Applicant Name: ___________________________________________ Applicant Phone: ________________________

Project Address: __________________________________________ Date: ____________________

Select a compliance path (R401.2)

☐ Path 1 (Prescriptive)  ☐ Path 2 (ERI and Stretch Code)  ✔ Mandatory Requirements (All projects)

Path 1. Prescriptive: Sections R401 – R404 & R407: Indicate page number in plans & specifications where details are found:

<table>
<thead>
<tr>
<th>Windows &amp; Doors</th>
<th>Skylights</th>
<th>Ceilings</th>
<th>Wood frame walls</th>
<th>Mass walls</th>
<th>Floors</th>
<th>Basement walls</th>
<th>Slab insulation / depth</th>
<th>Crawlspace walls</th>
</tr>
</thead>
<tbody>
<tr>
<td>Option A:</td>
<td>R-value (R402.1.2)</td>
<td>Maximum value</td>
<td>Minimum value</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>U-0.30</td>
<td>U-0.55</td>
<td>R-49</td>
<td>R-20 or R-13+5</td>
<td>R-13 / R-17</td>
<td>R-30</td>
<td>R-15 / R-19</td>
<td>R-10 / 2 ft.</td>
</tr>
<tr>
<td>Option B:</td>
<td>Equivalent U-factor (R402.1.4): Must include calculations</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>U-0.30</td>
<td>U-0.55</td>
<td>U-0.026</td>
<td>U-0.060</td>
<td>U-0.082</td>
<td>U-0.033</td>
<td>U-0.050</td>
<td>U-0.1 / 2 ft.</td>
</tr>
<tr>
<td>Option C: Total UA alternative (R402.1.5 plus MA amendment R402.1.5.1)</td>
<td>☐ REScheck™ version 4.6.5 or later</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Additional Efficiency Packages (R407.1)

☐ More Efficient HVAC performance (R407.2)
☐ Heat or energy recovery ventilation system (R403.6.1)
☐ High efficiency water heating or solar thermal hot water heating (R407.3)

Path 2. Energy rating index (ERI) and Approved Alternatives (R406): MANDATORY FOR STRETCH CODE (optional path in non-stretch communities). Documentation must be submitted prior to issuing building permit. Select one method below.

☐ Option A. RESNET HERS rating with MA amendments: Submittal must include: Preliminary HERS rating with Index score less than or equal to Table R406.4, description of energy features, and a statement that the rating index score is “based on plans”.

<table>
<thead>
<tr>
<th>New construction</th>
<th>Whole house renovations; additions</th>
</tr>
</thead>
<tbody>
<tr>
<td>55</td>
<td>65</td>
</tr>
</tbody>
</table>

Note: Higher HERS Index scores are permitted for projects that include renewable energy generation. See MA 780 CMR Chapter 11 Table R406.4

☐ Option B. Certified ENERGY STAR® homes, version 3.1 (R406.1.1): Submittal must include: Preliminary HERS rating, description of energy features, and a statement that the rating index score is "based on plans".

☐ Option C. Passive House Institute US or Passive House Institute certification: Submittal must include: WUFI or PHPP compliance report which demonstrates compliance with PHIUS+2018 (or newer) or PHI performance requirements, a statement that the WUFI or PHPP results are “based on plans”, and evidence of PHIUS or PHI precertification approval.

General Mandatory Requirements (ALL PROJECTS):

☐ Air sealing and insulation to be installed per Table R402.4.1.1
☐ Blower door test to be completed (R402.4.1.2) Building envelope leakage must be ≤ 3 ACH50
☐ Ducts to be pressure tested by a HERS Rater, HERS RFI, or BPI Certified Pro. Exception: All ducts/air handlers are inside (R403.3.3.)
☐ Boiler temperature setback control indicated in specifications (R403.2) on page #

☐ Mechanical ventilation rate (R403.6): ___________ CFM

Method by which ventilation rate was calculated (select one):
1. Equation 4-1 (R406.3)
2. ENERGY STAR® Homes v3.1
3. ASHRAE 62.2-2013
4. MA amendment formula

☐ Heating and cooling load calculations (Manual J) and Equipment Selection report (Manual S) to be submitted (R403.7)

Solar Ready Zone indicated in construction documents on page # (RA101.1 through 103.6 and RA103.8) Note: This requirement applies only to new construction of one- and two-family dwellings and townhouses, excluding additions, and has the following exceptions:
1. less than 600 square feet of roof area is oriented between 110° and 270° of true north;
2. buildings with a permanently installed on-site renewable energy system;
3. buildings with a solar-ready zone that is shaded for more than 70 percent of daylight hours annually.
Massachusetts Energy Code
Residential New Construction Inspection and Final Documentation Checklist

*This page may be used by the local building department to assist in performing energy code inspections and collecting required documentation.

Applicant Name ____________________________________  Applicant Phone ___________________
Project Address ___________________________________  Permit number ________________________
Reviewed by: ______________________________________  Date ______________________

Path 1. Prescriptive: Sections R401 – R404 & R407 (Not applicable to Stretch Code Communities)

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☐ Option A. R-Value
U-0.30  U-0.55  R-49  R-20 or R-13+5  R-13 / R-17  R-30  R-15 / 2 ft.  R-15 / R-19

☐ Option B. Equivalent U-factor
If Option 1B was selected on the reverse side of this form, the installed materials match provided calculations

☐ Option C. Total UA Alternative
If Option 1C was selected on the reverse side of this form, installed values match the REScheck certificate

☐ Additional Efficiency Packages
The additional efficiency package selected on the reverse side of this form has been installed

Path 2. Energy rating index (ERI) and Approved Alternatives (R406): **MANDATORY FOR STRETCH CODE** (optional path in non-stretch communities). Verify the permit applicant has submitted documentation for one of the following options.

☐ Option A. Certified RESNET HERS rating with MA amendments
- Final HERS certificate indicating HERS rating index score complying with Table R406.4
- HERS rater verified ENERGY STAR Thermal Enclosure Checklist
- Copy of certificate required by R401.3 listing the final HERS Index score

☐ Option B. Certified ENERGY STAR® Homes, Version 3.1
- Final ENERGY STAR® Homes certificate
- Certified final HERS rating
- ENERGY STAR® Thermal Enclosure System Checklist signed by Rater
- Copy of certificate required by R401.3 listing the final HERS Index score

☐ Option C. Certified Passive House (or PHIUS) performance method
- Updated WUFI or PHPP compliance report demonstrating compliance with PHIUS+2018 (or newer) or PHI performance requirements
- Passive House Rater’s test results
- Statement that the WUFI or PHPP results are “based on ‘as built’ conditions, incorporating the relevant test results and documented changes to equipment, materials, and assemblies that impact performance”

General Mandatory Requirements (ALL PROJECTS). Verify the following measures have been installed and testing documentation has been received.

☐ 1. Air barrier - Mandatory (Table R402.4.1.1) – Continuous air barrier is properly installed, and connections between components are properly sealed

☐ 2. Air leakage testing - Mandatory (R402.4.1.2) – Blower door test verification form received. Leakage is not over 3 ACH50

☐ 3. Duct sealing - Mandatory (R403.3.2) – All ducts, air handlers and filter boxes are sealed

☐ 4. Duct testing and leakage (R403.3.3 and .4) – Duct leakage test verification form received. Exception: All ducts and air handlers are within the building envelope. Leakage is not over 4 cubic ft. per 100 sq. ft. of conditioned floor area. (3 cubic ft. if test was performed at rough-in and without air handler installed) NOTE: Leakage may be higher if house complies using the ERI Path.

☐ 5. Duct insulation (R403.3.1) – Space conditioning ductwork in vented attics must be R-8 (or R-6 if <3” diameter). Space conditioning ductwork in all other unconditioned spaces must be R-6. (R-4.2 if <3” diameter.)

☐ 6. Building framing cavities are not used as ducts or plenums - Mandatory (R403.3.5)

☐ 7. Hot water boiler outdoor temperature setback - Mandatory (R403.2) – Installation verified

☐ 8. Mechanical ventilation - Mandatory (R403.6.2 as amended) – Airflow testing documentation collected from HERS rater, HERS Inspector, or BPI Certified Professional.

☐ 9. Lighting - Mandatory (R404.1) – Minimum 90% of the permanently installed lighting fixtures must contain only high-efficacy lamps (e.g., fluorescent or LED)

☐ 10. Certificate - Mandatory (R401.3) – Permanent certificate listing insulation R-values, fenestration U-factors, duct R-values, blower door and duct leakage test results, and final HERS Index Score (when applicable), is posted on a wall in the space where the heating system is located, utility room, or other approved location inside the building

Notes: