

**COMMERCIAL NEW CONSTRUCTION**  
**Massachusetts Energy Code 9<sup>th</sup> Edition**  
**Checklist of Required Documentation**  
 (To be completed by the permit applicant)



Applicant Name \_\_\_\_\_ Applicant Phone \_\_\_\_\_

Project Address \_\_\_\_\_

**Type of Construction:**

<input type="checkbox"/> <b>New Construction</b>	<input type="checkbox"/> <b>Addition</b>	<input type="checkbox"/> <b>Alteration</b>	<input type="checkbox"/> <b>Change of Occupancy</b>
--	--	--	---

**Select Compliance Path (C401.2):**

<input type="checkbox"/> <b>#1: ASHRAE Standard 90.1 or Massachusetts Stretch Code (select one below):</b>
<input type="checkbox"/> <b>Prescriptive:</b> Provide plans and specifications demonstrating compliance with all measures of 90.1-2016 Section 5, 6,7,8,9.
<input type="checkbox"/> <b>Energy Cost Budget</b> (Chapter 11): Provide plans and specifications demonstrating compliance with all 90.1-2016 mandatory measures of Section 5 and all measures in 6,7,8,9.
<input type="checkbox"/> <b>Performance Rating</b> (Appendix G): Provide plans and specifications demonstrating compliance with all mandatory requirements. Provide energy model documentation including inputs and outputs of the energy model and a summary report. Energy model must be based on 90.1-2016 Section 11 of 90.1 2016.
<input type="checkbox"/> <b>Massachusetts Stretch Code:</b> All buildings over 100,000 ft <sup>2</sup> , and new supermarkets, laboratories and conditioned warehouses over 40,000 ft <sup>2</sup> must demonstrate energy use per square foot at least <u>10% below the energy requirements of ASHRAE 90.1-2013 Appendix G.</u>

<input type="checkbox"/> <b>#2: IECC Prescriptive Path:</b> Provide plans and specifications demonstrating compliance with all measures of Sections C402 through C405, C406, and C408.
--

<input type="checkbox"/> <b>#3: IECC Performance Path:</b> Provide plans and specifications demonstrating compliance with all measures of Sections C402.3, C405, C407, C408. (select one option below)
<input type="checkbox"/> Option 1: Energy Rating Index for Multifamily up to 5 stories
<input type="checkbox"/> Option 2: Passive House (PHIUS+18 or PHI)

**Requirements for Chosen Compliance Path:**

**Compliance Path # 1: ASHRAE Standard 90.1-2016/MA Stretch Code**

**Prescriptive Path and Energy Cost Budget (Chapter 11):**

<input type="checkbox"/> Attach COMcheck Report (Code = ASHRAE 90.1)	<input type="checkbox"/> Meet C402.3 Rooftop Solar Ready & C405.10 EV- Ready	<input type="checkbox"/> Indicate C406 Options Below
--	--	--

**Section C406 – Must Include Three (3) options**

<input type="checkbox"/> C406.2 More Efficient HVAC	<input type="checkbox"/> C406.3 Reduced LPD	<input type="checkbox"/> C406.4 Enhanced Lighting Controls	
<input type="checkbox"/> C406.5 Renewable Energy	<input type="checkbox"/> C406.6 DOAS	<input type="checkbox"/> C406.7 High Efficiency SHW	<input type="checkbox"/> C406.8 Enhanced Env. Perf.
<input type="checkbox"/> C406.9 Reduced Air Infiltration	<input type="checkbox"/> C406.10 Renewable Space Heating	<input type="checkbox"/> C406.11 Type IV Heavy Timber Const.	

**Performance Path: Energy Cost Budget (Chapter 11) or Appendix G:**

Compliance report for permitting must include:	<input type="checkbox"/> A statement indicating that the proposed design complies with Chapter 11 or Appendix G
	<input type="checkbox"/> A site-specific energy analysis report
	<input type="checkbox"/> The name of the individual performing the analysis and generating the report
	<input type="checkbox"/> The name and version of the compliance software tool

**Massachusetts Stretch Code:**

<input type="checkbox"/> Provide plans and specifications demonstrating compliance with all mandatory requirements. Provide energy model documentation including inputs and outputs of the energy model and a summary report. Energy model must be based on and show to be 10% better than <b>90.1-2013 Appendix G.</b>
---

### Compliance Path #2: IECC Prescriptive

- |  |  |   |  |
|--|--|---|--|
| <input type="checkbox"/> Attach COMcheck Report (Code = 2018 IECC) | <input type="checkbox"/> Meets C402 through C405 | <input type="checkbox"/> Meet C402.3 Rooftop Solar Ready & C405.10 EV Ready | <input type="checkbox"/> Indicate C406 Options Below |
|--|--|---|--|

#### Section C406 – Must Include Three (3) options

- |  |  |  |   |
|--|--|--|---|
| <input type="checkbox"/> C406.2 More Efficient HVAC      | <input type="checkbox"/> C406.3 Reduced LPD              | <input type="checkbox"/> C406.4 Enhanced Lighting Controls   |   |
| <input type="checkbox"/> C406.5 Renewable Energy         | <input type="checkbox"/> C406.6 DOAS                     | <input type="checkbox"/> C406.7 High Efficiency SHW          | <input type="checkbox"/> C406.8 Enhanced Env. Perf. |
| <input type="checkbox"/> C406.9 Reduced Air Infiltration | <input type="checkbox"/> C406.10 Renewable Space Heating | <input type="checkbox"/> C406.11 Type IV Heavy Timber Const. |   |

### Compliance Path #3: IECC Performance

- |  |   |   |
|--|---|---|
| <input type="checkbox"/> Attach COMcheck Report (Code = 2018 IECC) | <input type="checkbox"/> Meet C402.3 Rooftop Solar Ready & C405.10 EV-Ready | <input type="checkbox"/> Meets C405, C407, C408 |
|--|---|---|

#### Multifamily ERI –based compliance in accordance with C407.1.1:

- |   |  |
|---|--|
| Compliance report for permitting shall comply with C407.5.1 and C407.6 and include: | <input type="checkbox"/> HERS compliance report with score of 55 or lower for each finished residential unit, attested to be ‘based on plans’.<br><input type="checkbox"/> A site-specific description of unit’s energy features<br><input type="checkbox"/> The name of the individual performing the analysis and generating the report<br><input type="checkbox"/> The name and version of the compliance software tool |
|---|--|

#### Passive House Institute US or Passive House Institute compliance with C407.1.2

- |   |   |
|---|---|
| Compliance report for permitting shall comply with C407.5.2 and C407.6 and include: | <input type="checkbox"/> A WUFI or PHPP compliance report showing proposed design complies with PHI/PHIUS+2018 performance requirements, and evidence of precertification approval from PHIUS or PHI.<br><input type="checkbox"/> Statement that WUFI or PHPP results are based on plans.<br><input type="checkbox"/> Certified Passive House consultant verifies compliance. |
|---|---|

### Construction Document Location:

#### Required Construction Details

Indicate primary locations within the construction documentation of the following information:

	Drawing Page(s)	Specification(s)
<b>Building thermal envelope</b>		
Cross section showing insulation R-values and materials for each building thermal envelope component		
Cross section showing air barrier/air sealing details		
Fenestration U-factors and solar heat gain coefficients (SHGCs)		
<b>Mechanical systems</b>		
Design criteria		
Equipment types, sizes and efficiencies		
Controls description		
Pipe insulation		
Fan motor horsepower (hp) and controls		
Economizer description		
Duct sealing, insulation and location		
Service water heating systems		
Equipment types, sizes and efficiencies		
Controls description		
Pipe insulation and location		
<b>Lighting</b>		
Lighting fixture schedule with wattage and control narrative		
Location of daylight zones of floor plans		
<b>Other Compliance Items</b>		
Solar Ready roof zone in accordance with Appendix CA.		
EV Ready Spaces locations in accordance with C405.10		
COMcheck Reports (Mandatory, all Projects)		

- Commissioning Plan** - Preliminary Commissioning Plan from commissioning agent