

**Version Tracking Document for  
ENERGY STAR Qualified Homes, Program Requirements for the State of California, Revision 02  
1/15/2012**

In the time since the Version 3 ENERGY STAR New Homes guidelines for the state of California were released, EPA has modified, clarified and refined various aspects of the program documents. This document is a summary of these edits. EPA has also posted the revised program documents, labeled (Rev. 02) on its Web site at [www.energystar.gov/newhomesguidelines](http://www.energystar.gov/newhomesguidelines).

All revisions are categorized as a Change, Clarification, or Refinement. These are defined as follows:

**Change** – The addition, deletion, or modification of a program requirement. A change will typically result from a partner question or feedback indicating that EPA's original intent is not being met or due to changes in relevant standards (e.g., ENERGY STAR labeled product requirements, NAECA standards, ICC codes). A change is the most significant type of edit for partners because it is likely to change the way that partners comply with the program.

**Clarification** – The clarification of a program requirement, typically resulting from a partner question indicating confusion or ambiguity. Clarifications are not intended to significantly change the scope of the program guidelines, but rather to clarify the original intent of the requirement. A clarification is secondary in importance to a change; it should not significantly alter the way that most partners comply with the program.

**Refinement** – A minor revision, such as an improved choice of words, a grammatical correction, or a correction to a typographical error. A refinement is the least important type of edit; it should have no impact on the way that partners comply with the program.

## **California ENERGY STAR Version 3 Guidelines**

### **1. Clarification – Partnership, Training, and Credentialing Requirements**

A section has been added to clarify the partnership, training, and credentialing requirements for builders, Raters, and HVAC contractors working on ENERGY STAR qualified homes. This new section appears after the "ENERGY STAR Performance Path" section and reads as follows:

#### **"Partnership, Training, and Credentialing Requirements**

Builders, Raters, and HVAC contractors must meet the following requirements prior to qualifying homes under these guidelines:

- Builders are required to be ENERGY STAR partners and complete the online Version 3 Builder Orientation. Partnership Agreements and Version 3 Builder Orientation can be found at [www.energystar.gov/homesPA](http://www.energystar.gov/homesPA).
- HVAC contractors must be credentialed by an EPA-recognized HVAC Quality Installation Training and Oversight Organization (H-QUITO). An explanation of this process and links to H-QUITOs can be found at [www.energystar.gov/newhomesHVAC](http://www.energystar.gov/newhomesHVAC).
- Raters and Field Inspectors are required to complete Version 3 Training which can be found at [www.resnet.us/energystar](http://www.resnet.us/energystar).

### **2. Clarification – Footnote 5**

If a conflict with code or other external guidelines prevents a home from including an energy efficiency feature required by the Inspection Checklists, that feature cannot be used to help the home meet or exceed the California 2008 Building Energy Efficiency Standards requirements by 15% under the Performance Path. If modeling the home as it will be built, without the efficiency feature, causes it to fail, then additional upgrades must be used to compensate for the missing feature. To clarify this, Footnote 5 has been revised as follows:

- a. "In cases where the overlapping requirements exceed the ENERGY STAR guidelines, these overlapping requirements shall be met;
- b. "In cases where overlapping requirements conflict with a requirement of these ENERGY STAR guidelines (e.g., slab insulation is prohibited to allow visual access for termite inspections), then the conflicting requirement within these guidelines shall not be met. Qualification shall only be allowed if the Rater has determined that no equivalent option is available that could meet the intent of the conflicting requirement of

these ENERGY STAR guidelines (e.g., switching from exterior to interior slab edge insulation). Note that, under the Performance Path, a home must still meet or exceed the California 2008 Building Energy Efficiency Standards requirements by 15%. Therefore, other efficiency measures may be needed to compensate for the omission of the conflicting requirement.”

## California ENERGY STAR Version 2.5 Guidelines

### 3. **Clarification** – Footnote 5

If a conflict with code or other external guidelines prevents a home from including an energy efficiency feature required by the Inspection Checklists, that feature cannot be used to help the home meet or exceed the California 2008 Building Energy Efficiency Standards requirements by 15% under the Performance Path. If modeling the home as it will be built, without the efficiency feature, causes it to fail, then additional upgrades must be used to compensate for the missing feature. To clarify this, Footnote 5 has been revised as follows:

- c. “In cases where the overlapping requirements exceed the ENERGY STAR guidelines, these overlapping requirements shall be met;
- d. “In cases where overlapping requirements conflict with a requirement of these ENERGY STAR guidelines (e.g., slab insulation is prohibited to allow visual access for termite inspections), then the conflicting requirement within these guidelines shall not be met. Qualification shall only be allowed if the Rater has determined that no equivalent option is available that could meet the intent of the conflicting requirement of these ENERGY STAR guidelines (e.g., switching from exterior to interior slab edge insulation). Note that, under the Performance Path, a home must still meet or exceed the California 2008 Building Energy Efficiency Standards requirements by 15%. Therefore, other efficiency measures may be needed to compensate for the omission of the conflicting requirement.”