

**Version Tracking Document for  
ENERGY STAR Certified Homes, Program Requirements for the State of Florida, Revision 05  
6/01/2013**

In the time since the Version 3 and 3.1 ENERGY STAR Certified Homes guidelines for the state of Florida 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. 05) 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.

## **Florida ENERGY STAR Version 3.1 Guidelines**

### **1. Clarification – Prescriptive Path: Use of sampling protocol**

To clarify that Raters who operate under a Sampling Provider are permitted to verify the Minimum Rated Features of the home using the RESNET-approved sampling protocol, the following sentence has been added to the end of Footnote 9:

“Raters who operate under a Sampling Provider are permitted to verify the Minimum Rated Features of the home using the RESNET-approved sampling protocol.”

### **2. Refinement – Performance Path: Using software to determine the ENERGY STAR HERS Index Target**

To clarify that the process of determining the ENERGY STAR HERS Index Target must be completed using a RESNET-accredited rating software program, and is no longer permitted to be completed manually, the phrase “Use a RESNET-accredited Home Energy Rating software program...” has been added to the beginning of Step 1 of the Performance Path. Additionally, the second paragraph of Step 1 of the Performance Path, which states that Raters are permitted to calculate the ENERGY STAR HERS Index Target manually until software becomes available to do this automatically, has been removed.

### **3. Refinement – Step 2 of Performance Path: Reference to Thermal Enclosure System Rater Checklist**

To improve clarity, the reference to Items 1.2 and 2.1 of the TES in Step 2 of the Performance Path have been removed and the first paragraph of Step 2 has been revised as follows:

“Using the same RESNET-accredited Home Energy Rating software program, configure the preferred set of energy measures for the rated home and verify that the resulting HERS Index meets or exceeds the ENERGY STAR HERS Index Target, as determined in Step 1. Note that, regardless of the measures selected, Mandatory Requirements for All Qualified Homes in Exhibit 2 are also required and impose certain constraints on the energy measures selected (e.g., insulation levels, insulation installation quality, window performance, duct leakage).”

### **4. Refinement – Exhibit 2: Redundant Section header and accompanying text removed**

To eliminate redundancy, the Section header (i.e., “Mandatory Requirements for All ENERGY STAR Qualified Homes”) and accompanying text (i.e., “As noted in the Performance Path and the Prescriptive Path, all ENERGY STAR Qualified New Homes must meet the requirements of the checklists in Exhibit 2”) have been removed.

### **5. Change - Exhibit 2 & Footnote 25: Removal of Indoor airPLUS Checklist as compliance option**

Because all ENERGY STAR Certified Homes must complete the Water Management System Builder Checklist regardless of the home’s participation in the Indoor airPLUS program, the phrase “(or Indoor airPLUS Verification

Checklist)” has been removed from Exhibit 2 as has Footnote 25, which describes how to use an Indoor airPLUS Verification Checklist as an alternative to the Water Management System Builder Checklist.

6. **Refinement - Exhibit 4: Consolidation of Footnotes**

To improve the clarity of the document, Footnote 1 of Exhibit 4 has been moved to the general Footnotes for the rest of the document and renumbered accordingly.

Footnote 2 of Exhibit 4, which is duplicative of the general Footnote 14, has been deleted and the general Footnote has been referenced instead.

Footnote 3 of Exhibit 4, which allowed advance labeling of homes under Version 2.5 and prohibited homes from being certified under Version 3 until January 1, 2012, is no longer applicable and has been removed.

Footnote 4 of Exhibit 4, which allowed labeling of homes under Version 3 prior to July 1, 2012 where a utility or state sponsor was mandating or incentivizing early adoption, is no longer applicable and has been removed.

7. **Refinement – Footnote 8: Removal of redundant guidance on Benchmark Home Size for zero bedrooms**

Because a column has already been added to the Benchmark Home table in Exhibit 3 for zero bedrooms, the guidance in Footnote 8 on this topic is redundant. To avoid redundancy, the sentence “If, as a result of this policy, a home has zero applicable bedrooms with regard to the Benchmark Home Size determination, then the Benchmark Home Size for one bedroom shall be used” has been removed.

8. **Refinement - Footnote 10: Complete definition of ENERGY STAR Reference Design**

The information in Footnote 10 is already provided in Step 1 of the Performance Path. To avoid redundancy, Footnote 10 has been removed.

9. **Refinement – Footnote 12: Improved word choice**

Footnote 12 stated that Grade II cavity insulation installation was acceptable if “continuous rigid insulation sheathing” was used. The use of the word “sheathing” was unnecessary and has been removed to avoid confusion.

10. **Refinement – Footnote 17: Improved word choice**

The phrase “meets the requirement for a radiant barrier” has been revised to “meets the intent of a radiant barrier”.

11. **Clarification - Footnote 21: Applicability of thermostats with ‘Adaptive Recovery’ technology**

To clarify that any home with an air-source or ground-source heat pump with an electric resistance heating element used to supplement the capacity of the heat pump is required to have a thermostat with ‘Adaptive Recovery’ technology, Footnote 21 has been revised as follows:

"For homes with heat pumps that contain an electric resistance heating element used to supplement the capacity of the heat pump, the thermostat shall have ‘Adaptive Recovery’ technology to prevent excessive use of the heating element."

Note that a home with an air-source or ground-source heat pump that only includes an electric resistance heating element used during compressor failure (i.e., emergency heat) is not required to have a thermostat with ‘Adaptive Recovery’ technology.

12. **Refinement – Footnote 22: Improved word choice**

The phrase “only after all components of the system have been installed (e.g., air handler and register grilles)” has been deleted to avoid potential redundancy or misalignment with the guidance on duct testing contained in the HVAC System QI Rater Checklist.

## **ENERGY STAR HERS Index Target Procedure for Florida**

13. **Refinement - Exhibit 2, Service Water Heating Systems: Addition of oil water heater Energy Factors**

The following rows have been added to the Service Water Heating Systems Section of Exhibit 2 to address the configuration of the ENERGY STAR Reference Design for homes with oil water heating:

**“Oil Storage Tank Capacity: 30 Gallon 40 Gallon 50 Gallon 60 Gallon 70 Gallon 80 Gallon**

**Oil DHW EF:                                    0.55      0.53      0.51      0.49      0.47      0.45”**

14. **Change - Exhibit 2, Service Water Heating Systems: Tank size**

To address the tank size to be modeled, the System Type definition in the Service Water Heating Systems Section of Exhibit 2 has been revised as follows:

“System Type: Conventional storage water heater with tank size equal to that of Rated Home, unless Rated Home uses instantaneous water heater in which case select 40 gallon tank for gas systems and 60 gallon tank for electric systems. Select applicable efficiency from below using tank size of Reference Home.”

## Florida ENERGY STAR Version 3 Guidelines

### 15. **Clarification** - Prescriptive Path: Use of sampling protocol

To clarify that Raters who operate under a Sampling Provider are permitted to verify the Minimum Rated Features of the home using the RESNET-approved sampling protocol, the following sentence has been added to the end of Footnote 7:

“Raters who operate under a Sampling Provider are permitted to verify the Minimum Rated Features of the home using the RESNET-approved sampling protocol.”

### 16. **Refinement** - Step 1 of Performance Path: Reference to Thermal Enclosure System Rater Checklist

To improve clarity, the reference to Items 1.2 and 2.1 of the TES in Step 1 of the Performance Path have been removed and the first paragraph of Step 1 has been revised as follows:

“Using a RESNET-accredited Home Energy Rating software program, configure the preferred set of energy measures for the rated home and verify that the resulting HERS Index meets or exceeds a HERS Index of 77. Note that, regardless of the measures selected, Mandatory Requirements for All Certified Homes in Exhibit 2 are also required and impose certain constraints on the energy measures selected (e.g., insulation levels, insulation installation quality, window performance, duct leakage).”

### 17. **Refinement** - Exhibit 2: Redundant Section header and accompanying text removed

To eliminate redundancy, the Section header (i.e., “Mandatory Requirements for All ENERGY STAR Qualified Homes”) and accompanying text (i.e., “As noted in the Performance Path and the Prescriptive Path, all ENERGY STAR Qualified New Homes must meet the requirements of the checklists in Exhibit 2”) have been removed.

### 18. **Change** - Exhibit 2 & Footnote 27: Removal of Indoor airPLUS Checklist as compliance option

Because all ENERGY STAR certified homes must complete the Water Management System Builder Checklist regardless of the home’s participation in the Indoor airPLUS program, the phrase “(or Indoor airPLUS Verification Checklist)” has been removed from Exhibit 2 as has Footnote 27, which describes how to use an Indoor airPLUS Verification Checklist as an alternative to the Water Management System Builder Checklist.

### 19. **Refinement** - Exhibit 3: Consolidation of Footnotes

To improve the clarity of the document, Footnote 1 of Exhibit 3 has been moved to the general Footnotes for the rest of the document and renumbered accordingly.

Footnote 2 of Exhibit 3, which is duplicative of the general Footnote 11, has been deleted and the general Footnote has been referenced instead.

Footnote 3 of Exhibit 3, which allowed advance labeling of homes under Version 2.5 and prohibited homes from being certified under Version 3 until January 1, 2012, is no longer applicable and has been removed.

Footnote 4 of Exhibit 3, which allowed labeling of homes under Version 3 prior to July 1, 2012 where a utility or state sponsor was mandating or incentivizing early adoption, is no longer applicable and has been removed.

### 20. **Refinement** – Footnote 9: Improved word choice

Footnote 9 stated that Grade II cavity insulation installation was acceptable if “continuous rigid insulation sheathing” was used. The use of the word “sheathing” was unnecessary and has been removed to avoid confusion.

### 21. **Clarification** - Footnote 12: Applicability of thermostats with ‘Adaptive Recovery’ technology

To clarify that any home with an air-source or ground-source heat pump with an electric resistance heating element used to supplement the capacity of the heat pump is required to have a thermostat with ‘Adaptive Recovery’ technology, Footnote 12 has been revised as follows:

"For homes with heat pumps that contain an electric resistance heating element used to supplement the capacity of the heat pump, the thermostat shall have 'Adaptive Recovery' technology to prevent excessive use of the heating element."

Note that a home with an air-source or ground-source heat pump that only includes an electric resistance heating element used during compressor failure (i.e., emergency heat) is not required to have a thermostat with 'Adaptive Recovery' technology.

22. **Refinement** – **Footnote 13: Improved word choice**

The phrase "only after all components of the system have been installed (e.g., air handler and register grilles)" has been deleted to avoid potential redundancy or misalignment with the guidance on duct testing contained in the HVAC System QI Rater Checklist.