

**Version Tracking Document for  
ENERGY STAR Qualified Homes, Program Requirements for Hawaii and Puerto Rico, Revision 01  
9/10/2012**

In the time since the Version 3 ENERGY STAR New Homes guidelines for the Hawaii and Puerto Rico 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. 01) 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.

## **Hawaii and Puerto Rico ENERGY STAR Version 3 Guidelines**

### **1. Clarification – Qualifying Homes: Eligibility to certify detached structures**

To clarify which types of structures are eligible to participate in the ENERGY STAR Homes program, the Qualifying Homes section has been revised to read:

- “Detached dwelling units (e.g. single family homes); OR
- Dwelling units in any multifamily building with 4 units or fewer; OR
- Dwelling units in multifamily buildings with 3 stories or fewer above-grade; OR
- Dwelling units in multifamily buildings with 4 or 5 stories above-grade that have their own heating, cooling, and hot water systems, separate from other units, and where dwelling units occupy 80% or more of the occupiable square footage of the building. When evaluating mixed–use buildings for eligibility, exclude commercial / retail space when assessing whether the 80% threshold has been met.

Dwelling units in multifamily buildings that are not eligible to earn the ENERGY STAR through the New Homes Program may be eligible through the Multifamily High Rise Program.”

A footnote has been added to define the term “dwelling unit”, which reads:

“A dwelling unit, as defined by the 2009 IECC, is a single unit that provides complete independent living facilities for one or more persons, including permanent provisions for living, sleeping, eating, cooking, and sanitation.”

### **2. Refinement – Exhibit 3: Inclusion of zero bedrooms in Benchmark Home exhibit**

To more clearly convey the Benchmark Home size of a home with zero bedrooms, a column for zero bedrooms has been added to Exhibit 3. To avoid redundancy, the phrase “if a home has zero bedrooms with regard to the Benchmark Home Size determination, then the Benchmark Home Size for one bedroom shall be used” has been removed from the Prescriptive Path section.

### **3. Clarification - Footnote 8: Definition of a Rater**

To more clearly communicate the requirements for completing Rater Checklists, Footnote 8 has been revised as follows:

“The term ‘Rater’ refers to the person completing the third-party inspections required for qualification. This person shall: a) be a certified Home Energy Rater, Rating Field Inspector, BOP Inspector, or an equivalent designation as

determined by a Verification Oversight Organization such as RESNET; and, b) have attended and successfully completed an EPA-recognized training class. See [www.energystar.gov/newhomestraining](http://www.energystar.gov/newhomestraining).”

4. **Refinement** – **Footnote 9: Minor typographical error**

To correct a minor typographical error in Footnote 9, the word “were” has been revised to “where”.

## **ENERGY STAR HERS Index Target Procedure for Hawaii and Puerto Rico**

5. **Refinement** – **Exhibit 1: Inclusion of zero bedrooms in Benchmark Home exhibit**

To more clearly convey the Benchmark Home size of a home with zero bedrooms, a column for zero bedrooms has been added to Exhibit 1. To avoid redundancy, the phrase “if a home has zero bedrooms with regard to the Benchmark Home Size determination, then the Benchmark Home Size for one bedroom shall be used” has been removed from Footnote 1.

6. **Refinement** – **Footnote 4: Minor typographical error**

To correct a minor typographical error in Footnote 4, the word “were” has been revised to “where”.

## **Hawaii and Puerto Rico Inspection Checklists**

7. **Change** – **Sampling Protocol**

To clarify several issues regarding sampling protocol, such as who is permitted to use sampling protocol, which sampling protocol may be used, and which Items may be verified using sampling, the last paragraph on the first page of the Version 3 Hawaii and Puerto Rico Inspection Checklists has been revised as follows:

“Raters who operate under a Sampling Provider are permitted to use the RESNET-approved sampling protocol for homes located outside California, and the CEC-approved sampling protocol for homes located in CA, to verify any item designated “Rater Verified”. No parties other than Raters are permitted to use sampling. All other items shall be verified for each certified home.

“For example, no items on the HVAC System QI Contractor Checklist are permitted to be verified using a sampling protocol because they may only be designated as “Builder Verified” or “Contractor Verified”. As another example, if a Rater verifies 10 items on the Water Management System Builder Checklist and the builder verifies the remaining checklist items, then the applicable (either RESNET or CEC) sampling protocol is permitted to be used only on the 10 Rater-verified items.”

8. **Clarification** - **Footnote 2: Definition of a Rater**

To more clearly communicate the requirements for completing Rater Checklists, Footnote 2 has been revised as follows:

“The term ‘Rater’ refers to the person completing the third-party inspections required for qualification. This person shall: a) be a certified Home Energy Rater, Rating Field Inspector, BOP Inspector, or an equivalent designation as determined by a Verification Oversight Organization such as RESNET; and, b) have attended and successfully completed an EPA-recognized training class. See [www.energystar.gov/newhomestraining](http://www.energystar.gov/newhomestraining).”

9. **Clarification** – **Alignment with National Inspection Checklists**

Because the HVAC System QI Contractor Checklist, HVAC System QI Rater Checklist, and Water Management System Builder Checklist from the National Program are also used in the HI & PR program, edits to these Checklists also apply to the HI & PR region. Rather than listing these edits twice, they have been listed as edits to the “Inspection Checklists Version 3, Rev. 05” in the [Revision 06 Tracking Document](#).

## **Thermal Comfort System Rater Checklist for HI & PR**

10. **Clarification**– **Footnote 1: Reference to requirements for credentialed HVAC contractor**

Because the description of the requirements for credentialed HVAC contractors has been moved from the cover page of the Inspection Checklists to a new Footnote in the HVAC System QI Rater Checklist, Footnote 1 of the Thermal Comfort System Rater Checklist for HI & PR has been revised as follows:

“Cooling loads shall be calculated according to the latest edition of ACCA Manual J. The Rater, builder, and HVAC contractor are permitted to calculate the load. An HVAC contractor is not required to hold specific credentials to complete this calculation. However, note that contractors completing the HVAC System QI Contractor Checklist shall be credentialed per the requirements indicated in Footnote 10 of the HVAC System QI Rater Checklist.”

## **Hawaii and Puerto Rico ENERGY STAR Version 2.5 Guidelines**

### **11. Clarification – Qualifying Homes: Eligibility to certify detached structures**

To clarify which types of structures are eligible to participate in the ENERGY STAR Homes program, the Qualifying Homes section has been revised to read:

- “Detached dwelling units (e.g. single family homes); OR
- Dwelling units in any multifamily building with 4 units or fewer; OR
- Dwelling units in multifamily buildings with 3 stories or fewer above-grade; OR
- Dwelling units in multifamily buildings with 4 or 5 stories above-grade that have their own heating, cooling, and hot water systems, separate from other units, and where dwelling units occupy 80% or more of the occupiable square footage of the building. When evaluating mixed-use buildings for eligibility, exclude commercial / retail space when assessing whether the 80% threshold has been met.

Dwelling units in multifamily buildings that are not eligible to earn the ENERGY STAR through the New Homes Program may be eligible through the Multifamily High Rise Program.”

A footnote has been added to define the term “dwelling unit”, which reads:

“A dwelling unit, as defined by the 2009 IECC, is a single unit that provides complete independent living facilities for one or more persons, including permanent provisions for living, sleeping, eating, cooking, and sanitation.”

### **12. Refinement – Exhibit 3: Inclusion of zero bedrooms in Benchmark Home exhibit**

To more clearly convey the Benchmark Home size of a home with zero bedrooms, a column for zero bedrooms has been added to Exhibit 3. To avoid redundancy, the phrase “if a home has zero bedrooms with regard to the Benchmark Home Size determination, then the Benchmark Home Size for one bedroom shall be used” has been removed from the Prescriptive Path section.

### **13. Clarification - Footnote 8: Definition of a Rater**

To more clearly communicate the requirements for completing Rater Checklists, Footnote 8 has been revised as follows:

“The term ‘Rater’ refers to the person completing the third-party inspections required for qualification. This person shall: a) be a certified Home Energy Rater, Rating Field Inspector, BOP Inspector, or an equivalent designation as determined by a Verification Oversight Organization such as RESNET; and, b) have attended and successfully completed an EPA-recognized training class. See [www.energystar.gov/newhomestraining](http://www.energystar.gov/newhomestraining).”

### **14. Refinement – Footnote 9: Minor typographical error**

To correct a minor typographical error in Footnote 9, the word “were” has been revised to “where”.