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Highlights from Version 3, Revision 04

Revision 04 of the Version 3 guidelines has now been posted to the [ENERGY STAR web site](http://www.energystar.gov). Partners are permitted to use this Revision immediately, at their discretion, but must apply this Revision to all homes permitted on or after October 1, 2011.

As part of this Revision, all major program documents have been updated. A Revision 04 Version Tracking Document, containing all of the specific changes in this Revision, has also been created. EPA strongly encourages partners to review these documents. The most substantial updates are summarized below:

National Program Requirements

- The implementation timeline has been adjusted, allowing homes permitted before January 1, 2012 to be qualified under Version 2.5 through June 30, 2012.
- The procedure for calculating the Benchmark Home Size and Size Adjustment Factor has been revised to include all bedrooms, regardless of location, but to continue to exclude conditioned floor area in most basements.
- The definition of gross basement wall area, used to determine whether to include conditioned floor area in a basement for the purpose of determining a home's Benchmark Home Size and Size Adjustment Factor, has been clarified for easier implementation.

All Inspection Checklists

- The use of sampling to verify compliance with items on the Inspection Checklists has been restricted to the Thermal Enclosure System Rater Checklist and the HVAC System Quality Installation Rater Checklist.
- Rating Field Inspectors may verify any item on the Inspection Checklists that Home Energy Raters may verify.

Thermal Enclosure System Rater Checklist

- Exemptions to the slab edge insulation requirement have been clarified and a process for requesting exemptions for challenging slab details has been defined.
- The reduced thermal bridging requirements for common walls, walls below grade, and mass walls (including Concrete Masonry Unit walls) have been clarified.
- Insulation requirements for headers in 2x4 assemblies in cold climates have been reduced.

HVAC System Quality Installation Contractor Checklist

- Additional flexibility has been provided when sizing HVAC equipment and designing duct systems for a home plan with multiple configurations (e.g., orientations, elevations, options), including extending the timeline for enforcement of site-specific design.

HVAC System Quality Installation Rater Checklist

- The timeline for enforcing the requirement for pressure-balanced bedrooms has been extended.
- The combustion safety test procedures for naturally drafted combustion appliances, unvented combustion appliances, and fireplaces have been clarified.

Water Management System Builder Checklist

- Additional alternatives have been provided to the requirement to tamp back-fill.
- The requirement for a layer of aggregate or sand with geotextile matting beneath slabs has been eliminated.