INFORMATION SHEET

No. M-06

DATE : October 18, 2019

SUBJECT : Mechanical

TITLE : Compliance with Title-24 Installation, Verification, and Acceptance Requirements and SFGBC AB-093 Attachment E Requirements

PURPOSE : The purpose of this Information Sheet is to explain compliance requirements for the Title-24 installation, verification, and acceptance energy certificates and San Francisco Green Building Code (SFGBC) AB-093 Attachment E requirements.

REFERENCE : 2016 California Energy Code Title 24, Part 1 and Part 6
2016 San Francisco Green Building Code AB-093
Information Sheets G-01, GB-01, M-02, M-03, M-04, and M-05

DISCUSSION : The 2016 California Energy Code (CEC) takes effect on January 1, 2016. The SFGBC AB-093 Attachment E form is required for new construction and major alteration permits that have a final certificate of occupancy after January 1, 2019. Appropriate Certificates of Installation, Acceptance, and Verification and the SFGBC AB-093 Attachment E form are to be completed by the responsible parties and documentation of compliance shall be submitted to Department of Building Inspection (DBI).

Required Certificates:

Applicable Title-24 Energy/Green Inspection Requirements forms are prepared as per Information Sheets M-03 and/or M-04 and affixed to the plans for permit submittal. The appropriate Certificates of Installation, Acceptance, and Verification forms that are to be completed prior to final inspection are indicated on the applicable Title-24 Energy Inspection Requirements form by the design professional, **energy consultant or other responsible party as allowed under Information Sheet G-01.

Note: For alterations to existing residential buildings for which Home Energy Rating System (HERS) field verification is not required; such as, water heater and window replacements; for additions to existing residential buildings that are less than 300 square feet for which HERS field verification is not required; the Certificate of Installation (forms listed on M-03 and M-04) documentation is not required.

The Certificate of Installation, Acceptance, and Verification forms can be found on the California Energy Commission website at http://energy.ca.gov/title24/2016standards/. Questions in regard to the certificates may be addressed by the California Energy Commission’s Energy Standard hotline at (800) 772-3300.

The San Francisco Green Building Code AB-093 Attachment E form is completed by the Design Professional of Record (Option 1)/Green Building Compliance Professional of Record (Option 2) for new construction and major alterations. The Attachment E form can be found on the SFDBI website at https://sfdbi.org/sites/default/files/AB-093.pdf.
Title-24 Energy Final Compliance Letter: (Affidavit)

It is the responsibility of the contractors, acceptance testers, and HERS raters to provide all the appropriate completed and signed certificates to the design professional, **energy consultant or other responsible party as allowed under Information Sheet G-01.

An Owner/Builder may submit the final affidavit for R3 occupancies provided the building permit was obtained by the Owner. The design professional, **Energy Consultant or other responsible party as allowed under Information Sheet G-01 shall email a compliance letter to the DBI Energy Inspection staff at dbi.energyinspections@sfgov.org. For HERS items, the affidavit must be submitted by a certified HERS Rater. The compliance letter shall include the following:

- Letterhead of Engineer, Architect, **Energy Consultant, or other responsible party.
  
  Note: DBI may accept the Final Compliance Letter from a Mechanical, Electrical, or Plumbing contractor on mechanical, electrical or plumbing work, respectively.

- Project Data – Project address, scope of work, Building Permit Application number, and if applicable, Mechanical, Electrical, or Plumbing permit numbers

- A list of the required certificates as per the Energy Inspection forms - This shall include the forms code at the end of each item specified [i.e. NRCI-LTI-01-E Certification of Installation-Indoor Lighting (IE6), NRCA-LTI-02 Lighting Controls (AE1)]

- A statement indicating all required certificates have been completed and signed together with license information

- Name (first and last), signature, and contact information of the design professional. This includes Engineers, Architects, Contractors, Owner/Builders (for Group R3 occupancy only), **Energy Consultants, Certified Acceptance Test Technicians, or other responsible parties as allowed under Information Sheet G-01 (please specify which one in the letter).

We recommend you use the sample letter attached.

Upon request all forms shall be available for review by DBI.

The completed and signed Certificates of Installation, Acceptance, and Verification forms shall be provided and maintained by the building owner.

Once the letter is received by DBI staff, the form codes will be checked off against those listed in DBI’s Permit Tracking System database. The final Certificate of Occupancy will not be issued until all required Title-24 energy installation/acceptance/verification items are cleared.

**Examples of Energy Consultants include:

Certified Energy Plans Examiner (CEPE): as issued by the California Association of Building Energy Consultants (CABEC) [http://www.cabec.org/]

Certified Energy Analyst (CEA): as issued by the California Association of Building Energy Consultants (CABEC) [http://www.cabec.org/]

Home Energy Rating System (HERS): as issued by the CalCERTS [https://www.calcerts.com/]

Acceptance Test Technician (ATT) certified by a California Energy Commission Acceptance Test Technician Certification Provider (ATTCHP)

San Francisco Green Building Compliance:

For new construction and major alterations, as defined in SFGBC AB-093, it is the responsibility of the Design Professional of Record (for Option 1) or Green Building Compliance Professional of Record (for Option 2) to complete the SFGBC AB-093 Attachment E form.

Once the completed Attachment E form is received by DBI staff, the form code will be checked off against those listed in DBI’s Permit Tracking System database. The final Certificate of Occupancy will not be issued until the SFGBC AB-093 Attachment E form is cleared.
Effective date of the provisions of this Information Sheet:

The provisions of the Title-24 energy inspection forms become effective for building permit applications submitted on or after January 1, 2017. The provisions of the SFGBC AB-093 Attachment E form is required for new construction and major alteration permits that have a final certificate of occupancy after January 1, 2019. For AB-093 Attachment E, the 2016 Energy/Green Inspection forms may be used for all previous code cycles.

Notes:

1. Refer to GB-01, Attachment H for projects required to exceed energy standards per San Francisco Green Building Code.
2. When the letter is submitted to DBI, State License number for Engineer, Architect or Contractor and Certificate number for Testers/Consultants and HERS Testers shall be provided in the letter.

Tom C. Hui, S.E., C.B.O., Director
Department of Building Inspection

Date: 01/18/19

Attachments:

1. Sample Compliance Letter (Affidavit)
2. Requirements for Submittals of Title 24 Compliance Letters (Table)
3. Sample Certificate Pg. 1
4. Sample Certificate Pg. 2
5. SFGBC AB-093 Attachment E

This Information Sheet is subject to modification at any time. For the most current version, visit our website at http://www.sfdbi.org
SAMPLE COMPLIANCE LETTER (AFFIDAVIT)

Date

Title 24 Coordinator  
Department of Building Inspection  
1660 Mission Street  
San Francisco, CA 94103

This is to confirm that the required Certificate of Installation, Acceptance and Verification for the project below has been completed and signed by the appropriate parties and is on file with the building owner. A copy will be available for Department review upon request.

Project Address:  
__________________________________________________________________________  
__________________________________________________________________________

Permit Application #:  
__________________________________________________________________________  
(Include mechanical, electrical and plumbing permits, if any)

Below is a list of all the required certificates for this project (see example):

1.  
(AEI NRCA-LTI-02 LIGHTING CONTROLS)  
__________________________________________________________________________

2.  
__________________________________________________________________________

3.  
__________________________________________________________________________

4.  
__________________________________________________________________________

Sincerely,

__________________________________________________________________________  
(Name and Signature)  
(Date)

Title  
[Engineer, Architect, Contractor, Energy Consultant, Owner Builder (for Group R3 occupancy only), Certified Acceptance Test Technician (ATT), etc. If ATT, include ATT number and expiration date]

License/Certificate No.  
__________________________________________________________________________

Address & Phone Number  
__________________________________________________________________________

NOTE: If not cleared after 10 business days, do not resubmit. Call 1(415)558-6132 and leave message explaining reason, permit application number and date of compliance letter. Special Inspections will return your call within 72 hours.
Information Required for Submittal of Compliance Letters

<table>
<thead>
<tr>
<th>PREPARER</th>
<th>LICENSE/INFORMATION REQUIRED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Architect</td>
<td>License No. _____________________________</td>
</tr>
<tr>
<td>Engineer</td>
<td>License No. _____________________________</td>
</tr>
<tr>
<td>Contractor</td>
<td>License No. _____________________________</td>
</tr>
<tr>
<td>Energy Consultants*</td>
<td>License No. &amp; _____________________________  Expiration Date _____________________________</td>
</tr>
<tr>
<td>Home Owners**</td>
<td>Contact Information _____________________________</td>
</tr>
</tbody>
</table>

* For HERS items, the Affidavit must be submitted by a licensed HERS rater

** For R3 occupancies ONLY
<table>
<thead>
<tr>
<th>Code</th>
<th>Type</th>
<th>System Type</th>
<th>Energy Type</th>
<th>Efficiency</th>
<th>District Block</th>
<th>Max. Daily Demand</th>
<th>Storage</th>
<th>Return</th>
<th>System Type</th>
<th>Energy Type</th>
<th>Efficiency</th>
<th>District Block</th>
<th>Max. Daily Demand</th>
<th>Storage</th>
<th>Return</th>
</tr>
</thead>
<tbody>
<tr>
<td>12</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
<td>8</td>
<td>9</td>
<td>10</td>
<td>11</td>
<td>12</td>
<td>13</td>
<td>14</td>
<td>15</td>
<td>16</td>
</tr>
</tbody>
</table>

*This document is part of the HERS (Home Energy Rating System) certification process. It contains information about the central water heating systems in a residential building.*

*Note: The table provides details on the central water heating systems installed in the building. This information is part of the certification process outlined in the HERS certification guidelines.*
Green Building: Final Compliance Verification

This form is required prior to issuance of a final Certificate of Completion.

Address: ________________________________________________________________

Permit Application Numbers: _____________________________________________

Verification that the above referenced project has been constructed to comply with the requirements of the San Francisco Green Building Code is based upon one of the following:

☐ Option 1: This project has submitted for certification under LEED or GreenPoint Rated (“Option 1” on the green building submittal), but is not yet certified. As the Design Professional of Record, I verify that, to the best of my knowledge, the project has been constructed to substantially comply with the green building requirements of San Francisco’s building codes.

Signed: ___________________________ Date: ______________
Affix professional stamp:

Mandatory follow-up for Option 1: Evidence of LEED or GreenPoint Rated certification.

Staff Use Only: Proof of LEED or GreenPoint Rated certification received:
Sign & Date: ____________________________

☐ Option 2: This project will not utilize LEED or GreenPoint Rated certification to demonstrate compliance with the San Francisco Green Building Code. As the Green Building Compliance Professional of Record for this project, I verify that to the best of my knowledge the above referenced project has been constructed to substantially comply with the green building requirements of San Francisco’s building codes. [Affix stamp below.]

Signed: ___________________________ Date: ______________
Affix professional stamp: