

Pre-energy Audit Document Checklist

Compiling up-to-date building documentation in advance of your energy audit is a necessary first step in the energy audit process. Having the relevant document ready before you contract an auditor will result in a timelier and better-quality audit. Materials to collect in advance of the audit include:

- Drawings relevant to the systems to be targeted, preferably “as-built” drawings if accurate
- Operations and Maintenance manuals
- Recent engineering facility evaluations and reports
- Testing, adjusting and balancing reports
- Original design documents
- A list of equipment including nameplate information, dates of installation, and submittals including pump and fan curves
- A list of regularly used outside service contractors
- Copies of current service contracts
- Control system documentation, such as sequences of operation, special control strategies, control diagrams, points list, and control program or code
- Energy-efficient operating strategies
- Utility bills and/or accounting information for at least the last 36 months, with any relevant supply contract information for each utility type (gas, electricity, water, steam, etc.)

It is also helpful to have your regular HVAC service contractor onsite on the day of the site visit to answer any technical questions the auditor may have. Plan to make arrangements once dates and times have been set.

Source: [California Commissioning Guide: Existing Buildings](#), 2006.