

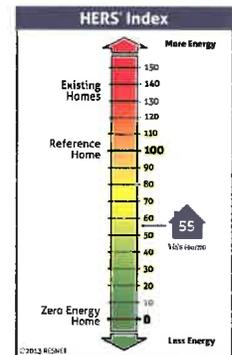
The Massachusetts Stretch Energy Code at a Glance

This document applies to new one- and two-family dwellings, townhouses, and dwelling units in R-use buildings four stories or less. Alterations, renovations, additions or repairs to existing buildings are exempt from the stretch energy code and are only required to comply with IECC Section R501 – R505 for matters relating to energy efficiency. All compliance paths must meet all mandatory requirements found on page two of this document.

Path 1

Energy Rating Index Compliance Alternative

- A **Home Energy System (HERS) Rating** must be completed by a certified HERS Rater for all new construction
- Homes without onsite renewable energy systems must achieve a **HERS Index score of 55 or less**
- Homes with onsite renewable energy systems are allowed a 5- to 12-point increase in maximum HERS Index depending on the type and number of systems. See Table R406.4 for more detail
- Documentation:
 - Preliminary HERS report, description of energy features and a statement that the index score is “based on plans” for permit
 - Final HERS report, completed ENERGY STAR Thermal Enclosure checklist and copy of certificate required by R401.3 for C.O



Path 2

ENERGY STAR® Certified New Homes

- The home must receive a certification from the **EPA's ENERGY STAR Certified New Homes Program, Version 3.1**.
- The program requires verification to be performed by a Home Energy System (HERS) Rater
- Documentation:
 - Preliminary HERS report, description of energy features and a statement that the index score is “based on plans” for permit
 - ENERGY STAR Homes certificate, Final HERS Report, completed ENERGY STAR Thermal Enclosure checklist and copy of certificate required by R401.3 for C.O



Path 3

Passive House

- The home must receive a certification from **PHIUS or PHI**
- The program requires verification by a **Certified Passive House Consultant** using PHIUS or PHI approved software
- Documentation:
 - A WUFI or PHI report demonstrating compliance with PHIUS+2018 (or newer) or PHI requirements, a statement that the report is “based on plans” and evidence of PHIUS or PHI precertification approval
 - An updated WUFI or PHI report demonstrating compliance with PHIUS+2018 (or newer) or PHI requirements, copy of Rater's test results, a statement that report the is “based on ‘as-built’” conditions



Energy Code Questions? Call **855-757-9717** or email **energycodesma@psdconsulting.com**



Mandatory requirements

- Certificate (R401.3)
- Air Leakage (R402.4)
- Maximum fenestration U-factor and SHGC (R402.5)
- Controls (R403.1)
- Heat pump supplementary heat (R403.1.2)
- Duct sealing (R403.3.2)
- Duct testing (R403.3.3)
- Building cavities (R403.3.5)
- Mechanical system pipe insulation (R403.4)
- Heated water circulation and temperature maintenance system (R403.5.1)
- Hot water pipe insulation (R403.5.3) (Required for Path 1 only)
- Mechanical ventilation (R403.6)
- Equipment sizing and efficiency rating (R403.7)
- System serving multiple dwelling units (R403.8)
- Snow melt and ice system controls (R403.9)
- Pools and permanent spas (R403.10)
- Portable spas (R403.11)
- Lighting equipment (404.1)

Learn More at [MassSave.com/EnergyCode](https://www.masssave.com/EnergyCode)

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Massachusetts Energy Code 9th Edition

Air Barrier and Insulation Installation Checklist

(Based on IECC 2018 Table R402.4.1.1)

| GENERAL REQUIREMENTS | | |
|---|--|--|
| <input type="checkbox"/> A continuous air barrier shall be installed in the building envelope. <input type="checkbox"/> The exterior thermal envelope contains a continuous air barrier. <input type="checkbox"/> Breaks or joints in the air barrier shall be sealed. <input type="checkbox"/> Air-permeable insulation shall not be used as a sealing material. <input type="checkbox"/> All insulation shall be installed at a Grade I quality in accordance with ICC/RESNET 301 | | |
| FRAMING INSPECTION | | |
| <input type="checkbox"/> | Ceiling/attic | <ul style="list-style-type: none"> The air barrier in any dropped ceiling/soffit shall be aligned with the insulation and any gaps in the air barrier shall be sealed. |
| <input type="checkbox"/> | Walls | <ul style="list-style-type: none"> The junction of the foundation and sill plate shall be sealed. The junction of the top plate and the top of exterior walls shall be sealed. Knee walls shall be sealed. Walls are framed to allow the corner to be insulated or continuous insulation is/will be installed. |
| <input type="checkbox"/> | Windows, skylights and doors | <ul style="list-style-type: none"> The space between window/door jambs and framing, and skylights and framing shall be sealed. |
| <input type="checkbox"/> | Rim joists | <ul style="list-style-type: none"> Rim joists shall include the air barrier. |
| <input type="checkbox"/> | Floors (including above garage and cantilevered floors) | <ul style="list-style-type: none"> The air barrier shall be installed at any exposed edge of insulation. |
| <input type="checkbox"/> | Crawl space walls | <ul style="list-style-type: none"> Exposed earth in unvented crawl spaces shall be covered with a Class I vapor retarder with overlapping joints taped. |
| <input type="checkbox"/> | Garage separation | <ul style="list-style-type: none"> Air sealing shall be provided between the garage and conditioned spaces. |
| <input type="checkbox"/> | Shower/tub on exterior wall | <ul style="list-style-type: none"> Exterior walls adjacent to showers and tubs shall be insulated The air barrier installed at exterior walls adjacent showers and tubs shall separate them from the showers and tubs. |
| <input type="checkbox"/> | Electrical/phone box on exterior walls | <ul style="list-style-type: none"> The air barrier shall be installed behind electrical or communication boxes or air-sealed boxes shall be installed. |
| <input type="checkbox"/> | Concealed sprinklers | <ul style="list-style-type: none"> When required to be sealed, concealed fire sprinklers shall only be sealed in a manner that is recommended by the manufacturer. Caulking or other adhesive sealants shall not be used to fill voids between fire sprinkler cover plates and walls or ceilings. |



| INSULATION INSPECTION | | |
|--------------------------------|--|---|
| <input type="checkbox"/> | Ceiling/attic | <ul style="list-style-type: none"> The insulation in any dropped ceiling/soffit shall be aligned with the air barrier. |
| <input type="checkbox"/> | Walls | <ul style="list-style-type: none"> Cavities within corners and headers of frame walls shall be insulated by completely filling the cavity with a material having a thermal resistance of R-3 per inch minimum. Exterior thermal envelope insulation for framed walls shall be installed in substantial contact and continuous alignment with the air barrier. |
| <input type="checkbox"/> | Rim joists | <ul style="list-style-type: none"> Rim joists shall be insulated. |
| <input type="checkbox"/> | Floors (including above garage and cantilevered floors) | <ul style="list-style-type: none"> Floor framing cavity insulation shall be installed to maintain permanent contact with the underside of subfloor decking, or floor framing cavity insulation shall be permitted to be in contact with the top side of sheathing, or continuous insulation installed on the underside of floor framing and extends from the bottom to the top of all perimeter floor framing members. |
| <input type="checkbox"/> | Crawl space walls | <ul style="list-style-type: none"> Where provided instead of floor insulation, insulation shall be permanently attached to the crawlspace walls. |
| <input type="checkbox"/> | Narrow cavities | <ul style="list-style-type: none"> Batts in narrow cavities shall be cut to fit, or narrow cavities shall be filled by insulation that on installation readily conforms to the available cavity space. |
| <input type="checkbox"/> | Recessed lighting | <ul style="list-style-type: none"> Recessed lighting fixtures installed in the building thermal envelope shall be air tight and IC rated. |
| PLUMBING ROUGH-IN INSPECTION | | |
| <input type="checkbox"/> | Plumbing and wiring | <ul style="list-style-type: none"> Batt insulation shall be cut neatly to fit around wiring and plumbing in exterior walls, or insulation that on installation readily conforms to available space shall extend behind piping and wiring. |
| MECHANICAL ROUGH-IN INSPECTION | | |
| <input type="checkbox"/> | Shafts, penetrations | <ul style="list-style-type: none"> Duct shafts, utility penetrations, and flue shafts opening to exterior or unconditioned space shall be sealed. |
| <input type="checkbox"/> | HVAC register boots | <ul style="list-style-type: none"> HVAC register boots that penetrate building thermal envelope shall be sealed to the subfloor, wall covering, or ceiling penetration. |
| FINAL INSPECTION | | |
| <input type="checkbox"/> | Recessed lighting | <ul style="list-style-type: none"> Recessed light fixtures installed in the building thermal envelope shall be sealed to the finished surface. |
| <input type="checkbox"/> | Ceiling/Attic | <ul style="list-style-type: none"> Access openings, drop down stairs or knee wall doors to unconditioned attic spaces shall be sealed. |

Notes:

Massachusetts Energy Code Residential New Construction Permit Application and Plan Review Checklist

Version 1.0

*This page is to be completed by the permit applicant and submitted to the local building department with other required permit application documents.

Applicant Name: _____ Applicant Phone: _____

Project Address: _____ Date: _____

Select a compliance path (R401.2)

| | | |
|--|--|---|
| <input type="checkbox"/> Path 1 (Prescriptive) | <input type="checkbox"/> Path 2 (ERI and Stretch Code) | <input checked="" type="checkbox"/> Mandatory Requirements (All projects) |
|--|--|---|

Path 1. Prescriptive: Sections R401 – R404 & R407: Indicate page number in plans & specifications where details are found:

| | Windows & Doors | Skylights | Ceilings | Wood frame walls | Mass walls | Floors | Basement walls | Slab insulation / depth | Crawlspace walls |
|---|-----------------|-----------|----------|--|-------------|---------|---|-------------------------|------------------|
| <input type="checkbox"/> Option A: R-value (R402.1.2) | Maximum value | | | Minimum value | | | | | |
| | U-0.30 | U-0.55 | R-49 | R-20 or R-13+5 | R-13 / R-17 | R-30 | R-15 / R-19 | R-10 / 2 ft. | R-15 / R-19 |
| <input type="checkbox"/> Option B: Equivalent U-factor (R402.1.4): Must include calculations | Maximum value | | | | | | | | |
| | U-0.30 | U-0.55 | U-0.026 | U-0.060 | U-0.082 | U-0.033 | U-0.050 | U-0.1 / 2 ft. | U-0.055 |
| <input type="checkbox"/> Option C: Total UA alternative (R402.1.5 plus MA amendment R402.1.5.1) | | | | | | | <input type="checkbox"/> REScheck™ version 4.6.5 or later | | |
| | | | | | | | <input type="checkbox"/> REScheck-Web™ | | |
| <input checked="" type="checkbox"/> Additional Efficiency Packages (R407.1) All prescriptive projects must comply with one of the options to the right. Select one. | | | | <input type="checkbox"/> More Efficient HVAC performance (R407.2) | | | | | |
| | | | | <input type="checkbox"/> Heat or energy recovery ventilation system (R403.6.1) | | | | | |
| | | | | <input type="checkbox"/> High efficiency water heating or solar thermal hot water heating (R407.3) | | | | | |

Path 2. Energy rating index (ERI) and Approved Alternatives (R406): MANDATORY FOR STRETCH CODE (optional path in non-stretch communities). Documentation must be submitted prior to issuing building permit. Select one method below.

Option A. RESNET HERS rating with MA amendments: Submittal must include: Preliminary HERS rating with Index score less than or equal to Table R406.4, description of energy features, and a statement that the rating index score is "based on plans".

Table R406.4

| Maximum HERS Index | |
|--------------------|------------------------------------|
| New construction | Whole house renovations; additions |
| 55 | 65 |

Note: Higher HERS Index scores are permitted for projects that include renewable energy generation. See MA 780 CMR Chapter 11 Table R406.4

Option B. Certified ENERGY STAR® homes, version 3.1 (R406.1.1): Submittal must include: Preliminary HERS rating, description of energy features, and a statement that the rating index score is "based on plans".

Option C. Passive House Institute US or Passive House Institute certification: Submittal must include: WUFI or PHPP compliance report which demonstrates compliance with PHIUS+2018 (or newer) or PHI performance requirements, a statement that the WUFI or PHPP results are "based on plans", and evidence of PHIUS or PHI precertification approval.

General Mandatory Requirements (ALL PROJECTS):

- Air sealing and insulation to be installed per Table R402.4.1.1
- Blower door test to be completed (R402.4.1.2) Building envelope leakage must be ≤ 3 ACH50
- Ducts to be pressure tested by a HERS Rater, HERS RFI, or BPI Certified Pro. Exception: All ducts/air handlers are inside (R403.3.3)
- Boiler temperature setback control indicated in specifications (R403.2) on page # _____

Mechanical ventilation rate (R403.6): _____ CFM

Method by which ventilation rate was calculated (select one):

- 1. Equation 4-1 (R406.3)
- 2. ENERGY STAR® Homes v3.1
- 3. ASHRAE 62.2-2013
- 4. MA amendment formula

Heating and cooling load calculations (Manual J) and Equipment Selection report (Manual S) to be submitted (R403.7)

Solar Ready Zone indicated in construction documents on page # _____ (RA101.1 through 103.6 and RA103.8) Note: This requirement applies only to new construction of one- and two-family dwellings and townhouses, excluding additions, and has the following exceptions:

1. less than 600 square feet of roof area is oriented between 110° and 270° of true north;
2. buildings with a permanently installed on-site renewable energy system;
3. buildings with a solar-ready zone that is shaded for more than 70 percent of daylight hours annually.

Massachusetts Energy Code Residential New Construction Inspection and Final Documentation Checklist

*This page may be used by the local building department to assist in performing energy code inspections and collecting required documentation.

Applicant Name _____ Applicant Phone _____

Project Address _____ Permit number _____

Reviewed by: _____ Date _____

| Path 1. Prescriptive: Sections R401 – R404 & R407 (Not applicable to Stretch Code Communities) | | | | | | | | | |
|--|---|-----------|----------|------------------|-------------|--------|----------------|---------------------|------------------|
| | Windows & Doors | Skylights | Ceilings | Wood frame walls | Mass walls | Floors | Basement walls | Slab R-value/ depth | Crawlspace walls |
| | Maximum value | | | Minimum value | | | | | |
| <input type="checkbox"/> Option A. R-Value | U-0.30 | U-0.55 | R-49 | R-20 or R-13+5 | R-13 / R-17 | R-30 | R-15 / R-19 | R-10 / 2 ft. | R-15 / R-19 |
| <input type="checkbox"/> Option B. Equivalent U-factor | If Option 1B was selected on the reverse side of this form, the installed materials match provided calculations | | | | | | | | |
| <input type="checkbox"/> Option C. Total UA Alternative | If Option 1C was selected on the reverse side of this form, installed values match the REScheck certificate | | | | | | | | |
| <input type="checkbox"/> Additional Efficiency Packages | The additional efficiency package selected on the reverse side of this form has been installed | | | | | | | | |

| Path 2. Energy rating index (ERI) and Approved Alternatives (R406): MANDATORY FOR STRETCH CODE (optional path in non-stretch communities). Verify the permit applicant has submitted documentation for one of the following options. | |
|---|--|
| <input type="checkbox"/> Option A. Certified RESNET HERS rating with MA amendments | <ul style="list-style-type: none"> Final HERS certificate indicating HERS rating index score complying with Table R406.4 HERS rater verified ENERGY STAR Thermal Enclosure Checklist Copy of certificate required by R401.3 listing the final HERS Index score |
| <input type="checkbox"/> Option B. Certified ENERGY STAR® Homes, Version 3.1 | <ul style="list-style-type: none"> Final ENERGY STAR® Homes certificate Certified final HERS rating ENERGY STAR® Thermal Enclosure System Checklist signed by Rater Copy of certificate required by R401.3 listing the final HERS Index score |
| <input type="checkbox"/> Option C. Certified Passive House (or PHIUS) performance method | <ul style="list-style-type: none"> Updated WUFI or PHPP compliance report demonstrating compliance with PHIUS+2018 (or newer) or PHI performance requirements Passive House Rater's test results Statement that the WUFI or PHPP results are "based on 'as built' conditions, incorporating the relevant test results and documented changes to equipment, materials, and assemblies that impact performance" |

| General Mandatory Requirements (ALL PROJECTS). Verify the following measures have been installed and testing documentation has been received. | |
|---|--|
| <input type="checkbox"/> 1. Air barrier - Mandatory (Table R402.4.1.1) – Continuous air barrier is properly installed, and connections between components are properly sealed | |
| <input type="checkbox"/> 2. Air leakage testing - Mandatory (R402.4.1.2) – Blower door test verification form received. Leakage is not over 3 ACH50 | |
| <input type="checkbox"/> 3. Duct sealing - Mandatory (R403.3.2) – All ducts, air handlers and filter boxes are sealed | |
| <input type="checkbox"/> 4. Duct testing and leakage (R403.3.3 and .4) – Duct leakage test verification form received. <i>Exception: All ducts and air handlers are within the building envelope.</i> Leakage is not over 4 cubic ft. per 100 sq. ft. of conditioned floor area. (3 cubic ft. if test was performed at rough-in and without air handler installed) <i>NOTE: Leakage may be higher if house complies using the ERI Path.</i> | |
| <input type="checkbox"/> 5. Duct insulation (R403.3.1) – Space conditioning ductwork in vented attics must be R-8 (or R-6 if <3" diameter). Space conditioning ductwork in all other unconditioned spaces must be R-6. (R-4.2 if <3" diameter.) | |
| <input type="checkbox"/> 6. Building framing cavities are not used as ducts or plenums - Mandatory (R403.3.5) | |
| <input type="checkbox"/> 7. Hot water boiler outdoor temperature setback - Mandatory (R403.2) – Installation verified | |
| <input type="checkbox"/> 8. Mechanical ventilation - Mandatory (R403.6.2 as amended) – Airflow testing documentation collected from HERS rater, HERS Inspector, or BPI Certified Professional. | |
| <input type="checkbox"/> 9. Lighting - Mandatory (R404.1) – Minimum 90% of the permanently installed lighting fixtures must contain only high-efficacy lamps (e.g., fluorescent or LED) | |
| <input type="checkbox"/> 10. Certificate - Mandatory (R401.3) – Permanent certificate listing insulation R-values, fenestration U-factors, duct R-values, blower door and duct leakage test results, and final HERS Index Score (when applicable), is posted on a wall in the space where the heating system is located, utility room, or other approved location inside the building | |

Notes:

Massachusetts Residential IECC Energy Performance Testing Certificate

House Address: _____ Permit #: _____ Date: _____
Permit holder: _____ Phone: _____

I Building Envelope Air Leakage (mandatory):

Blower door test (Mandatory)

Testing company: _____ Phone: _____
Tester Name (print): _____ Signature: _____ Date: _____
BPI or HERS Rater certification number: BPI no: _____ HERS Rater no: _____

Test Result:

Fan Flow at 50 Pascals = _____ CFM50 Total Conditioned Volume = _____ ft³

ACH50 = CFM50 x 60 / Volume = _____ ACH50 (must be ≤ 3.0 ACH50)

Visual Inspection (Mandatory)

- Air Barrier and Insulation Installation checklist completed, signed and included with this certificate.

II Heating and Cooling System Duct Leakage

- All portions of the ducts are located entirely within the building thermal envelope. Testing is not required*.

Duct leakage test

Testing company: _____ Phone: _____
Tester Name (print): _____ Signature: _____ Date: _____
BPI or HERS Rater certification number: BPI no: _____ HERS Rater no: _____

Total duct leakage test (choose 1):

- Rough-in w/ air handler (must be ≤ 4.0 CFM/100 ft²) Rough-in w/o air handler (must be ≤ 3.0 CFM/100 ft²)
 Post construction (must be ≤ 4.0 CFM/100 ft²)

Test Result:

System 1:

Fan Flow at 25 Pascals (CFM25) _____ CFM Conditioned Floor Area (CFA) served by system = _____ ft²

CFM25 / CFA x 100 = _____ CFM/100 ft²

System 2 (if present):

Fan Flow at 25 Pascals (CFM25) _____ CFM Conditioned Floor Area (CFA) served by system = _____ ft²

CFM25 / CFA x 100 = _____ CFM/100 ft²

*Note: When following the Energy Rating Index (ERI) path, a leakage to outdoors test is required per RESNET standards.



Residential Energy Code Compliance Paths

Non Stretch Code Communities

2015 IRC Chapter 11 as amended by 780 CMR 51.00¹

Energy Code Questions?
 Email: energycodesma@psdcconsulting.com
 Call: 855-757-9717 (toll free)
 Visit: www.masssave.com/energycode

Start Here

Is your building type listed below?

- One- and two-family dwellings and townhouses
- Groups R-2, R-3, and R-4 three stories or less

Yes

No

See 2018 IECC [CE]

Is it new construction³?

Yes

No

See IECC [RE] Ch. 5 Existing Buildings

Mandatory requirements:

- Certificate (N1101.3)
- Air leakage (N1102.4)
- Max. fenestration U-factor & SHGC (N1102.5)
- Controls (N1103.1)
- Heat pump supplementary heat (N1103.1.2)
- Duct sealing (N1103.3.2)
- Duct testing (N1103.3.3)
- Building cavities (N1103.3.5)
- Mechanical system pipe insulation (N1103.4)
- Heated water circulation and temperature maintenance systems (N1103.5.1)
- Mechanical ventilation (N1103.6)
- Equipment sizing and efficiency rating (N1103.7)
- Systems serving multiple dwelling units (N1103.8)
- Snow melt and ice system controls (N1103.9)
- Pools and permanent spas (N1103.10)
- Portable spas (N1103.11)
- Lighting equipment (N1104.1)



- One option to the right

Prescriptive

- Building Thermal Envelope (N1102)
- Systems (N1103)
- Electric Power & Lighting (N1104)
- Additional Efficiency Packages (N1107)

Prescriptive with Envelope Tradeoffs

- Same as above + Envelope tradeoffs in REScheck

Energy Rating Index²

- HERS Index
- or
- ENERGY STAR v3.1
- or
- Passive House Certified

¹ The provisions of IECC Chapter 4 [RE] are equivalent to IRC Chapter 11.

² See page 2 for more detail on each Energy Rating Index option.

³ Additions, alterations, repairs, and change of occupancy or use shall comply with IECC Chapter 5 Existing Buildings

Start Here

Residential Energy Code Compliance Paths

Stretch Code Communities

2015 IRC Chapter 11 as amended by 780 CMR 51.00¹



Energy Code Questions?

Email: energycodesma@psdcconsulting.com

Call: 855-757-9717 (toll free)

Visit: www.masssave.com/energycode

Is your building type listed below?

- R-use building four stories or less

Yes

No

See 2018 IECC [CE]

Is it new construction?²

Yes

No

See IECC [RE] Ch. 5 Existing Buildings

Mandatory requirements:

- Certificate (N1101.3)
- Air leakage (N1102.4)
- Max. fenestration U-factor & SHGC (N1102.5)
- Controls (N1103.1)
- Heat pump supplementary heat (N1103.1.2)
- Duct sealing (N1103.3.2)
- Duct testing (N1103.3.3)
- Building cavities (N1103.3.5)
- Mechanical system pipe insulation (N1103.4)
- Heated water circulation and temperature maintenance systems (N1103.5.1)
- Mechanical ventilation (N1103.6)
- Equipment sizing and efficiency rating (N1103.7)
- Systems serving multiple dwelling units (N1103.8)
- Snow melt and ice system controls (N1103.8)
- Pools and permanent spas (N1103.9)
- Portable spas (N1103.11)
- Lighting equipment (N1104.1)



- One option to the right

HERS Index ≤ 55²

- HERS Rating completed per the most recent version of ANSI/RESNET/ICC 301 by a RESNET-certified HERS Rater using RESNET-accredited software
- Permit application: Preliminarily HERS report, description of energy features, statement that rating is based on plans
- Final inspection: Final HERS report, rater verified ENERGY STAR Thermal Enclosure checklist, copy of certificate as required by R401.3

Certified ENERGY STAR Homes v3.1

- Verification completed by a RESNET-certified HERS Rater using RESNET-accredited software
- Permit application: Preliminary HERS Report, description of energy features, statement that rating is based on plans
- Final inspection: ENERGY STAR Homes certificate, Final HERS Report, signed ENERGY STAR Thermal Enclosure Checklist, copy of certificate as required by Section R401.3

Passive House Institute (PHI or PHIUS)

- Verification completed by a Certified Passive House Consultant using PHI or PHIUS approved software
- WUFI or PHPP compliance report, statement that report is based on plans, and evidence of PHIUS or PHI precertification
- Final Inspection: Updated WUFI or PHPP compliance report, copy of Passive House Rater's test results, statement that results are based on 'as built' conditions

¹ The provisions of IECC Chapter 4 [RE] are equivalent to IRC Chapter 11.

² If onsite renewable energy is part of the design, the maximum HERS Index may be increased by 5 to 12 points in accordance with 780 CMR Table N1106.4.1

³ Additions, alterations, repairs, and change of occupancy or use shall comply with IECC Chapter 5 Existing Buildings