Appendix B: Compliance checklist

B1 This compliance checklist is divided into three parts, as follows.

a. Part 1 contains the building details and declarations.

b. Part 2a functions as a design checklist for the simplified approach detailed in Section 1.

c. Part 2b functions as a design checklist for the dynamic thermal modelling approach detailed in Section 2.

d. Part 3 is for verifying the completion details of the as-built residential building.

B2 All three parts of the compliance checklist should be completed. The relevant parts of Part 2 and 3 should be signed by a person who is competent to design the residential building.

B3 A copy of this checklist, or a similar checklist, may be submitted to the building control body as evidence that the building has been constructed as designed to reduce the risk of overheating.

Part 1 – Building details and declarations

The designer should complete this section.

1.1 Building and site details	
Residential building name/number	
Street	
Town	
County	
Postcode	
Proposed building use/type of building	
Are there any security, noise or pollution issues?	
1.2 Designer's details	
Designer's name	
Company	
Address line 1	
Address line 2	
Postcode	
Telephone number	
Email address	

Part 2 – Design details

The designer should complete either Part 2a or 2b, depending on the method used.

Part 2a – Simplified method (as detailed in Section 1)

2a.1 Site details	
Site location, assigned using paragraph 1.3[1]	
Building category, assigned using paragraph 1.4	
2a.2 Designed overheating mitigation strategy	
Details of standards selected:	
a. Maximum area of glazing	
b. Maximum area of glazing in the most glazed room	
c. Shading strategy	
d. Total minimum free area	
e. Bedroom minimum free area	
2a.3 Designer's declaration	
Designer's name	
Designer's organisation	
Designer's signature	
Registration number (if applicable)	
Date of design	

NOTE:

1. All references to paragraphs are to Approved Document O.

Part 2b – Dynamic thermal modelling method (as detailed in Section 2)

2b.1 Modelling details			
Dynamic software name and version			
Weather file location used, including any additional, more extreme weather files			
Number of sample units modelled, including an explanation of why the size/selection has been chosen			
2b.2 Modelled occupancy			
Has the project passed the assessment described in CIBSE's TM59, taking into account the limits detailed in paragraphs 2.5 and 2.6?[1]		Yes ☐	No ☐
Details of the occupancy profiles used			
Details of the equipment profiles used			
Details of the opening profiles used			
2b.3 Modelled overheating mitigation strategy			
Free areas			
Infiltration and mechanical flow rates			
Window g-value			
Shading strategy			
Mechanical cooling			
2b.4 Modelling results			
Has the project passed the assessment described in CIBSE's TM59, taking into account the limits detailed in paragraphs 2.5 and 2.6?		Yes ☐	No ☐
What is the overall overheating strategy (i.e. what design features are key to the project passing)?			
2b.5 Designer's declaration			
Has the building construction proposal been modelled accurately?		Yes ☐	No ☐
Designer's name			
Designer's organisation			
Designer's signature			
Registration number (if applicable)			
Date of design			

NOTE:

1. *All references to paragraphs are to Approved Document O.*

Part 3 – Completion details

Both the builder and the building control body inspector should complete this section.

3.1 Builder's declaration			
Has the residential building been constructed and completed according to the specifications set out in Parts 1 and 2 of this checklist?		Yes ☐	No ☐
Builder's name			
Builder's organisation			
Builder's signature			
Date of signature			
3.2 Building control body inspector's declaration			
Is the residential building's construction consistent with the details provided in Parts 1 and 2 of this checklist?		Yes ☐	No ☐
Inspector's name			
Inspector's signature			
Registration number (if applicable)			
Date of inspection			