

Client:

Installation Type:

Installation Instructions Checklist

To qualify for ENERGY STAR, products shall have installation instructions readily available online or packaged with the product. This information does not need to be included on product labels. Electronic versions of instructions may be provided on the website of a retailer, manufacturer, and/or industry association. Retailers, manufacturers, and industry associations may include in these instructions whatever disclaimers they feel are necessary to limit their liability. EPA understands that the manufacturer cannot write installation instructions for every situation and that generic instructions covering the most common situations are acceptable to fulfill this requirement. The installation instructions shall include:

1. A list of hardware and tools required for installation, including those provided by the manufacturer and those not provided by the manufacturer.
2. Diagrams/pictures and descriptions of the product or a typical product of similar type and parts provided by the manufacturer.
3. General guidance on safely removing old products and preparing the frame for installation. Guidance should direct consumers to relevant content on proper management of lead paint, such as www.epa.gov/lead.* (Inclusion of diagrams/pictures is preferred, but optional.)
4. General information on proper disposal or recycling of products being removed.*
5. Detailed flashing instructions including diagrams/pictures or reference to the applicable flashing manufacturer's instructions, as applicable to the product.**
6. Instructions on properly shimming the product to achieve an installation that is flush, level, and plumb. (Inclusion of diagrams/pictures is preferred, but optional.)
7. Guidance on sealing and weatherproofing to prevent air and water infiltration at the product-wall interface. (Inclusion of diagrams/pictures is preferred, but optional.)
8. Variations of the above based on whether the job is a pocket installation, rough opening installation with exterior sheathing intact, and/or rough opening installation with exterior sheathing removed, as applicable to the product.

Comments:

Reviewed by:

Date Reviewed:

*Shall be present when Replacement installation type is selected, may be omitted under New Construction installation type

**Shall be present with New Construction installation type is selected, may be omitted under Replacement installation type