

Building Management System (BMS) Energy Performance Checklist 2026

System Connectivity & Sensor Calibration

Verification of all IoT sensors, thermostats, and actuators for accurate data transmission and calibration against baseline standards.

Calibration Date

Sensor Status

- ☐ Operational
- ☐ Malfunctioning
- ☐ Requires Replacement
- ☐ Offline

Deviation Percentage

Sensors Inspected

- ☐ Temperature Sensors
- ☐ Humidity Sensors
- ☐ CO2 Sensors
- ☐ Pressure Transducers
- ☐ Flow Meters

Calibration Notes

Write something...

Calibration Certificate

 Upload File

Technician Signature

HVAC Optimization & Setpoint Validation

Review of heating, ventilation, and air conditioning schedules, deadband settings, and seasonal temperature adjustments for maximum efficiency.

Inspection Date

Enter date...

Current HVAC Mode

- ☐ Heating
- ☐ Cooling
- ☐ Ventilation Only
- ☐ Economizer Mode

Current Temperature Setpoint (°C/°F)

Enter a number...

Measured Ambient Temperature

Enter a number...

Verified Components

- ☐ Thermostats
- ☐ Dampers
- ☐ VAV Boxes
- ☐ Air Handling Units (AHU)
- ☐ Chiller Setpoints

Discrepancy Notes & Observations

Write something...

Calibration Certificate or Photo Evidence

 Upload File

Technician Verification

Lighting Control & Occupancy Automation

Audit of lighting zones, daylight harvesting sensors, and occupancy-based dimming protocols to minimize idle energy consumption.

Lighting Zones Audited

- ☐ Office Areas
- ☐ Hallways & Corridors
- ☐ Parking Garages
- ☐ Lobby & Common Areas
- ☐ Storage & Mechanical Rooms

Occupancy Sensor Functionality

- ☐ Fully Operational
- ☐ Needs Calibration
- ☐ Malfunctioning/Non-Responsive
- ☐ Not Installed

Daylight Harvesting Sensor Sensitivity Level

Enter a number...

Discrepancies Found in Lighting Schedules

Write something...

Last Sensor Calibration Date

Enter date...

Lighting Efficiency Report/Photos



Upload File

Data Integration & Real-Time Monitoring

Assessment of data logging frequency, dashboard accuracy, and integration between the BMS and energy metering sub-systems.

Data Sync Frequency Status

- ☐ Real-time (Continuous)
- ☐ Interval-based (15-60 mins)
- ☐ Daily Batch
- ☐ Manual Upload

Sensor Latency (Seconds)

Enter a number...

Integrated Data Sources

- ☐ Smart Meters
- ☐ Temperature/Humidity Sensors
- ☐ CO2 Sensors
- ☐ Occupancy Sensors
- ☐ Power Meters

Dashboard URL/Access Point

Write something...

Recent Calibration Logs

 Upload File

Last System Integration Audit Date

Enter date...

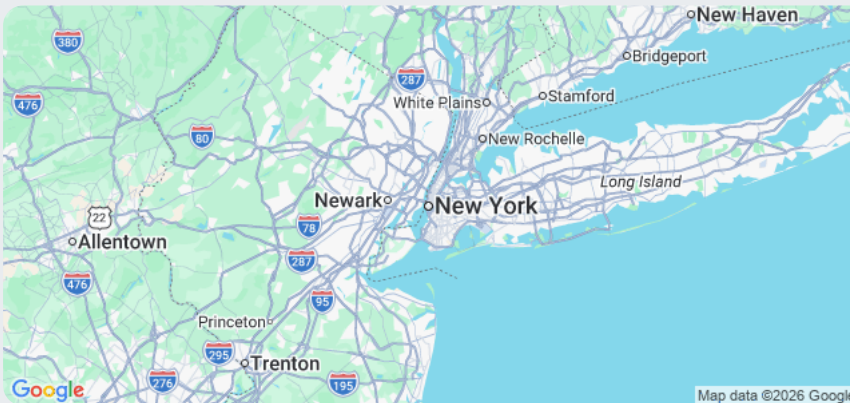
Data Discrepancy Notes

Write something...

Validation of energy consumption data from individual floors, departments, or heavy machinery to ensure granular tracking.

Enter date...

 Set My Current Location



☐ Electricity

☐ Water

☐ Gas

☐ Thermal/Chilled Water

Current Meter Reading

Enter a number...

Last Calibration Deviation (%)

Enter a number...

Verification Checks Performed

- ☐ Serial Number Match
- ☐ Physical Connection Integrity
- ☐ Communication Protocol Check
- ☐ Timestamp Synchronization

Calibration Certificate Upload

 Upload File

Inspector Signature

Hydronic & Airflow Efficiency Audit

Inspection of pump speeds, chiller plant optimization, and VFD (Variable Frequency Drive) performance under varying load conditions.

Chiller Plant Operational Status

- ☐ Fully Operational
- ☐ Operating with Issues
- ☐ Maintenance Required
- ☐ Offline

Current Chilled Water Supply Temperature (°C)

Enter a number...

Measured Airflow Rate (CFM/m³s)

Enter a number...

Inspected Components

- ☐ Variable Frequency Drives (VFDs)
- ☐ Cooling Towers
- ☐ Condenser Pumps
- ☐ Air Handling Units (AHUs)
- ☐ Dampers & Actuators

VFD and Pump Efficiency Observations

Write something...

Flow Rate Measurement Log/Report

 Upload File

Auditor Verification

Alarm Management & Fault Detection

Review of critical energy-related alerts, leak detection notifications, and the functionality of Automated Fault Detection and Diagnostics (AFDD).

Alarm Severity Level

- ☐ Critical
- ☐ Warning
- ☐ Information
- ☐ Advisory

Fault Description

Write something...

Alarm Detection Date

Enter date...

Alarm Timestamp

Affected Building Zones

- ☐ Floor 1
- ☐ Floor 2
- ☐ Floor 3
- ☐ Basement/Mechanical Room
- ☐ Roof/External Plant

System Error Log Screenshot

 Upload File

Technician Verification

Software & Cybersecurity Compliance

Ensuring BMS firmware is up to date and that remote access protocols comply with 2026 energy security and data privacy standards.

Last Software Update Date

Firmware Version Status

- ☐ Up to date
- ☐ Update required
- ☐ Critical vulnerability detected

Security Protocols Verified

- ☐ Multi-Factor Authentication (MFA) active
- ☐ Encrypted Data Transmission (TLS/SSL)
- ☐ User Access Logs Reviewed
- ☐ Firewall Configuration Validated

Cybersecurity Audit Report

 Upload File

IT Security Officer Approval

Energy Performance Reporting & KPI Tracking

Verification of automated report generation for Energy Use Intensity (EUI), peak demand monitoring, and carbon footprint reporting.

Reporting Period Start Date

Enter date...

Reporting Period End Date

Enter date...

Measured Energy Use Intensity (EUI)

Enter a number...

Peak Demand (kW) Recorded

Enter a number...

Energy Savings Target Status

- ☐ On Track
- ☐ Below Target
- ☐ Exceeding Target
- ☐ At Risk

KPIs Monitored in this Period

- ☐ Carbon Emissions (CO₂e)
- ☐ Cost Savings (\$)
- ☐ Load Factor
- ☐ Renewable Energy Fraction

Variance Analysis & Observations

Write something...

Monthly Energy Consumption Report (PDF)



Upload File

Energy Manager Approval

< Previous

> Next

🏁 Finish



Generate Sample Report