



Energy Audit Reporting Compliance Checklist

Audit Scope & Methodology

Ensures the audit scope accurately reflects the facility being audited and the methodology is appropriate for the industry and energy usage patterns.

Describe the facility being audited (e.g., building type, size, processes)

Write something...

Select the primary energy sources being assessed (e.g., electricity, natural gas, steam)

- ☐ Electricity
- ☐ Natural Gas
- ☐ Steam
- ☐ Renewable Energy (Specify)
- ☐ Other (Specify)

Total building area (square feet/meters)

Enter a number...

Date of facility commissioning/major renovation (if applicable)

Enter date...

Audit methodology applied (e.g., ASHRAE Level 1, Level 1 Quick Walkthrough, Detailed Level 3)

- ☐ ASHRAE Level 1 Quick Walkthrough
- ☐ ASHRAE Level 1 Detailed
- ☐ ASHRAE Level 2
- ☐ ASHRAE Level 3
- ☐ Other (Specify)

Briefly describe the rationale for the selected audit methodology.

Write something...

Data Collection & Verification

Confirms accuracy and completeness of energy consumption data, meter readings, and related documentation.

Meter Reading - Total kWh (Month 1)

Enter a number...

Meter Reading - Total kWh (Month 2)

Enter a number...

Meter Reading - Total kWh (Month 2)

Enter a number...

Date of Meter Reading

Enter date...

Time of Meter Reading

Meter Accuracy Verification Status

- ☐ Verified
- ☐ Not Verified
- ☐ N/A

Supporting Documentation (e.g., meter calibration records)

 Upload File

Analysis & Findings Documentation

Verifies clear and concise documentation of energy use patterns, inefficiencies, and potential savings opportunities.

Detailed Description of Key Energy Consumption Patterns

Write something...

Total Energy Consumption (kWh)

Enter a number...

Peak Demand (kW)

Enter a number...

Identified Energy Inefficiencies

- ☐ Lighting
- ☐ HVAC
- ☐ Equipment
- ☐ Building Envelope
- ☐ Process Heating

Narrative Explanation of Significant Findings

Write something...

Supporting Data Charts/Graphs

 Upload File

Recommendations & Action Plan

Reviews the feasibility, cost-effectiveness, and potential impact of recommended energy efficiency measures.

Detailed Description of Recommendation

Write something...

Estimated Cost of Implementation

Enter a number...

Estimated Annual Energy Savings (kWh)

Enter a number...

Estimated Payback Period (Years)

Enter a number...

Priority Level (High/Medium/Low)

☐ High

☐ Medium

☐ Low

Target Implementation Date

Enter date...

Responsible Department(s)

- ☐ Facilities
- ☐ Engineering
- ☐ Procurement
- ☐ Operations

Potential Risks and Mitigation Strategies

Write something...

Reporting Format & Content

Ensures the report adheres to required standards and includes all necessary information for review and approval.

Report Template Version

- ☐ Version 1.0
- ☐ Version 1.1
- ☐ Version 1.2

Total Energy Savings (kWh)

Enter a number...

Total Cost Savings (\$)

Enter a number...

Executive Summary

Write something...

Supporting Data Files

 Upload File

Report Distribution Method

- ☐ Email
- ☐ Shared Drive
- ☐ Printed Copy

Report Submission Date

Enter date...

Review & Approval Process

Documents that required personnel have reviewed and approved the audit findings and recommendations.

Date of Initial Review

Enter date...

Reviewer Name

Write something...

Review Outcome

- ☐ Approved
- ☐ Rejected
- ☐ Requires Revision

Review Comments (if rejected or revision needed)

Write something...

Reviewer Signature

Date of Final Approval (if applicable)

Enter date...

Approver Name

Write something...

Record Retention & Accessibility

Confirms appropriate record-keeping procedures are in place for audit documentation.

Number of Years Records Retained

Enter a number...

Storage Medium (Physical/Digital)

- ☐ Physical (Paper)
- ☐ Digital (Electronic)

Description of Record Storage Location (Physical or Digital)

Write something...

Last Record Retention Review Date

Enter date...

Access Control Method (e.g., Password, Physical Key)

- ☐ Password Protection
- ☐ Physical Key/Lock
- ☐ Other

Contact Person for Record Retrieval

Write something...

Regulatory Compliance

Verifies adherence to relevant energy regulations and reporting requirements.

Applicable Regulations (Select all that apply)

- ☐ Energy Policy Act of 2005
- ☐ State Energy Efficiency Standard (SEES)
- ☐ Local Building Energy Codes
- ☐ ISO 50001 Certification
- ☐ Other (Specify in LONG_TEXT)

If 'Other' selected above, please specify:

Write something...


Last Regulatory Compliance Review Date

Enter date...

Reporting Frequency (e.g., annually, bi-annually)

Enter a number...

Supporting Documentation (Permits, certifications, etc.)

 Upload File

Reporting Submission Method

- ☐ Online Portal
- ☐ Email
- ☐ Mail