

## REDi EB: Milestone Checklist (v1.0 as of January 2026)

TAP to fill in checklist upon completion of milestone deliverables. Once all items in a milestone are checked off, the "Verification of Milestone" row will turn green. This information will auto-populate the Requisition Approval Form Tab to ensure TAP can easily identify whether a milestone has been completed.



<b>MILESTONES: All buildings in REDi program. Note: Certain system types have different requirements, as noted below.</b>	<b>Details (for reference only, subject to change)</b>	<b>Resources</b>	<b>Max Amount that can be approved (may be adjusted per TAP)</b>
<b>Milestone 1: Closing Docs &amp; Kick Off</b>			
All outstanding pre-closing documentation	Final budget, Requisition Format, etc. TAP added to distribution list for meeting minutes, schedule updates, & Cx, distribution for requisitions & PCOs related to REDi Scope	REDi Budget and Requisition Workbook, Contact List	
Construction Kickoff Meeting	Introduce TAP team, coordinate ongoing communication, Review Milestones and Site Visits. Distribute this Checklist. Meeting may be virtual. TAP given access to submittals, change order documents, as-builts etc.	This Checklist.	
Soft Cost Payment, if being requested	At the discretion of HPD Program, up to 10% of the total award may be used for certain soft costs related to the design and engineering of REDi: EB scope items. This funding will be agreed upon at the time of application.	<a href="#">REDi Term Sheet</a>	
Verification of Milestone	<b>Max Amount that can be approved upon completion of Milestone 1-----&gt;</b>		<b>10%</b>
<b>Milestone 2: Electrification Kickoff &amp; Submittals</b>			
Have previous milestones been met?	Only initial if all previous milestones have been met		
Electrification Kickoff Meeting w/ GC	Review technical requirements including Appendix A, Heat Pump Tracker for contractor use, and this Milestone Checklist. Include HVAC team (PM, pipe fitter, lead tech) and optional Sustainability Consultant.	<a href="#">Applicable REDi Technical Requirements, Heat Pump Tracker</a>	
Technician sign-off on Technical Requirements	Contractor to provide written certification that each technician installing heat pumps have read and agree to the technical requirements. Submit initial Technician List and maintain updates during installation. Notify TAP if install crews change and with any request for TAP inspection.	REDi Technical Requirements Split systems & Heat Pump Tracker- Technician List	
Cut Sheets for REDi Scope 1&2 Items (Approved by Designer)	Final Submittals, including Cut Sheets and Shop Drawings, for REDi Scope Items related to Scopes 1 & 2 (Heat Pumps), including Thermostats/ Controls.		
Cut Sheets for REDi Scope 3 Items Approved by Architect/ Consultant. (Scope 3 projects only)	Final Submittals, including Cut Sheets and Shop Drawings, for REDi Scope 3 Items (windows, insulation, ERV system, etc.)		
Verification of Milestone	<b>Max Amount that can be approved upon completion of Milestone 2-----&gt;</b>		<b>40%</b>
<b>Milestone 3: Rough Ins</b>			
<b>Rough Ins Completed &amp; Inspected</b>			
Have previous milestones been met?	Only initial if all previous milestones have been met		
Inspection(s) - Open Wall. Upon completion of first complete lineset. (Split systems only)	Upon completion of first complete lineset installed per Appendix A technical requirements and prior to wall close-in. TAP inspection includes: refrigerant piping and joints, pipe support spacing, air sealed penetrations, metal nail protection plates, verifies as-built pipe length and location record-keeping on-site. Additional open wall inspections may be required at TAP's Discretion. If TAP issues field report. Contractor responds to deficiencies with photos & narrative.	REDi Technical Requirements- Split Systems  Contractor: As-Built VRF report (LATs, DSB, etc.) & Heat Pump Tracker	
Inspection(s) - Pressure Test Refrigerant Pipes. May be completed w/ Open Wall. (Split Systems only)	TAP observes: proper digital equipment & procedures, review pressure test record documentation being kept by contractor, progress on heat pump tracker & generally align expectations on procedures and documentation. (3rd party verification report acceptable at TAP discretion)	See above	
Inspection - Open Wall. PTHP/ Room Heat Pump systems only	TAP to observe rough-in, including surface prep, sleeve design, thermal breaks, air-sealing, and condensate drainage plan. Review plan for electrical power alligns with HPD Electric Heating Policy.	REDi Technical Requirements- Room Heat Pumps Manufacturer Directions	
Inspection (s) - Follow up work if necessary (based on TAP notes/ follow up items)	Re-inspect corrected work, or spot check work on additional buildings at TAP discretion. Contractor to notify TAP if pipe installation technicians change and Appendix A procedures need to be verified again.		
Verification of Milestone	<b>Max Amount that can be approved upon completion of Milestone 3-----&gt;</b>		<b>70%</b>
<b>Milestone 4: Equipment Installed</b>			
<b>Equipment Installed, including Start Up and Testing</b>			
Have previous milestones been met?	Only initial if all previous milestones have been met		
Inspection - Evacuation and system charging prior to start of lineset evacuation. (Split systems only)	TAP to observe lineset evacuation decay test and procedures for at least one system. Items to be observed include: Digital gauges with current calibrations; Location vacuum pump is connected; Service valve positions; Record of pump oil changes; Depth of vacuum; Review evacuation test record being kept by contractor.	Heat Pump Tracker Cols	
Inspection - DHW piping (REDi-funded Domestic Hot Water systems only)	TAP to review physical equipment piping and trim installation or receive detailed photos at TAP discretion	REDi Technical Requirements- HPWH Manufacturer Directions	
Split Heat Pump Tracker & Refrigerant Charging Report (Split systems only)	Submit completed Heat Pump Tracker spreadsheet summary and Refrigerant Charging Report per Appendix A Quality Control section of technical requirements. The previously shared heat pump tracker acts as a coversheet for this information.	Heat Pump Tracker, Refrigerant Charging Report	

Thermostats & Controls	Ensure thermostats and controls are set per REDI Technical Requirements: Thermostats should be preset with setpoint limits and to a schedule to be obtained in writing from the <u>owner for each space</u>	Applicable REDI Technical Requirements,	
Verification of Milestone	<b>Max Amount that can be approved upon completion of Milestone 4 -----&gt;</b>		<b>90%</b>
<b>Milestone 5: Final Documents</b>	<b>All Final Documents Submitted</b>		
Have previous milestones been met?	Only initial if all previous milestones have been met		
Preliminary Cx Report (if required by energy code, typically bldgs over 20 units)	Preliminary Cx report is transmitted to TAP.		
Warranties for REDI systems	Warranty report, including detailing start/end dates of warranties. 10+ yr parts, 1+yr labor <u>per Rider</u>	Warranties	
Maintenance Plan & Optional Contract	Submit In-House Maintenance Plan for all heat pump equipment for owner's staff. Submit Optional Comprehensive Maintenance Contract for all heat pump equipment that aligns <u>with manufacturer's requirements and best practices</u> .	Applicable REDI Maintenance Plans may be used	
Staff training prep meeting (at least 1 month prior to Substantial Completion)	Owner/HPD and contractor convenes and TAP facilitates an operating staff training planning meeting related to operation and maintenance of heat pumps. Owner to confirm who staff are, and what their roles are. TAP ensure that Maintenance Plans and Contracts <u>are given to building staff</u>	Staff Training Meeting Agenda?	
Resident training prep meeting (at least 1 month prior to Substantial Completion)	Owner/HPD & sustainability consultant convenes and TAP facilitates a resident training planning meeting for all in-unit heat pumps and controls.	Resident Training Meeting Agenda?	
O&M Manuals Submitted	Detailed manufacturer's operation handbook + maintenance manual containing information on the major components and a schedule of required system maintenance, including maintenance and testing requirements of antifreeze solutions used on the project and any start-up/commissioning documentation for the system(s). For commercial-grade VRF systems or systems over 5-tons, the O&M manual must include as-built drawings.		
Verification of Staff (& Resident) Training	TAP attends and participates in training session(s). -or- TAP <u>reviews training materials and sign-in sheets submitted by contractor</u> .		
Completed Construction Checklist	This checklist, completed and signed by TAP.		
Verification of Milestone	<b>Once Milestone 5 is hit, TAP can approve up to this amount-----&gt;</b>		<b>100%</b>
<b>Milestone 6: Release of Retainage</b>	<b>Final Testing Submitted</b>		
Have previous milestones been met?	Only initial if all previous milestones have been met		
Final Contractor Testing (REDI-funded Heat Pumps only)		Applicable REDI Technical Requirements,	
Final Energy code Cx Report	Includes: - DHW full load test (if HPWH Scope 1 funding included. ) - Resolved Cx Issues - <u>Other requirements per Energy Code C408</u>	NYCECC C408	
Verification of Milestone	<b>Once Milestone 5 is hit, TAP can approve up to this amount-----&gt;</b>		<b>Retainage</b>