



HOME PERFORMANCE UPGRADE CHECKLIST
NEW HEAT PUMP INSTALLATION

SunState Account# _____

Permit # _____

EXISTING EQUIPMENT #1			
Manufacturer:		AHU Model:	
SEER:	HSPF:	Capacity:	Condensator Model:
Manufacturer:		AHU Model:	
SEER:	HSPF:	Capacity:	Condensator Model:

EXISTING EQUIPMENT #2			
Manufacturer:		AHU Model:	
SEER:	HSPF:	Capacity:	Condensator Model:
Manufacturer:		AHU Model:	
SEER:	HSPF:	Capacity:	Condensator Model:

SYSTEM SIZING	(SEMI-OPTIONAL, SEE GUIDE)
<input type="checkbox"/>	A Manual J8 whole-home was performed to properly size new system(s)
<input type="checkbox"/>	A Manual J8 room-by-room was performed to determine required room air flows

NEW EQUIPMENT #1			
Manufacturer:		AHU Model:	
SEER:	HSPF:	Capacity:	Condensator Model:
Manufacturer:		AHU Model:	
SEER:	HSPF:	Capacity:	Condensator Model:

NEW EQUIPMENT #2			
Manufacturer:		AHU Model:	
SEER:	HSPF:	Capacity:	Condensator Model:
Manufacturer:		AHU Model:	
SEER:	HSPF:	Capacity:	Condensator Model:

AIR LEAKAGE	
<input type="checkbox"/>	Supply and return plenums properly secured and supported
<input type="checkbox"/>	Supply and return plenum penetrations sealed with foam, caulk or mastic
<input type="checkbox"/>	Mastic applied to all plenum connections at air handler unit
<input type="checkbox"/>	Filter cover at air handler makes a complete seal
<input type="checkbox"/>	All seams/penetrations at air handler unit are sealed with putty or UL181 tape and mastic (optional)
<input type="checkbox"/>	Access panels at air handler are sealed with UL181 tape (optional)
<input type="checkbox"/>	All penetrations in air handler (line set, condensation line, etc.) sealed

INSTALL	
<input type="checkbox"/>	All wires inside units tightly connected to terminals and properly secured
<input type="checkbox"/>	Lines & coil evacuated to 500 microns for a minimum of 10 minutes
<input type="checkbox"/>	Evaporator Fan speed set properly per manufacturer specifications for system configuration
<input type="checkbox"/>	Condensation drain lines tested for proper drainage
<input type="checkbox"/>	Drain Pan over flow and condensation line safety switch tested for proper operation
<input type="checkbox"/>	Horizontal Drain pan in air handler unit removed for vertical installations

START UP**Operate system in appropriate mode for 30 minutes before taking refrigerant measurements:**

COOL	HEAT	COOL	HEAT
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Supply Air Temperature:	F	F	Suction Pressure:	PSIG	PSIG
Return Air Temperature:	F	F	Head Pressure:	PSIG	PSIG
Manufacturer Refrigerant Specs			Measured Refrigerant Data		
Subcool:	F	Superheat:	F	Subcool:	F
Electrical					
Motor Amperage Readings:	Condensor	Evaporator Fan	Compressor		
Auxilliary Heat					
Supply Air Temp w/ AUX Heat:	F	Outdoor Temp:	F	Electric Heat Amps:	

POST-INSTALLATION DUCT TESTING

- All ducts associated with the replaced HVAC equipment were tested to less than 10% leakage to outside (optional)
- A test and balance of the system was performed for delivered BTU output (optional)

HOMEOWNER ORIENTATION

- Educated homeowner on operation of programmable thermostat
- Discussed maintenance issues (filter, drain line, etc) with homeowner
- Showed homeowner location of all breakers for HVAC system
- Discussed the checklist with homeowner and answered all questions
- Outside temp. was below 60 degrees. Will return when temp. above 60 to verify refrigerant charge

The contractor has answered all questions regarding the checklist. I understand the checklist is **NOT** a guarantee of quality or performance but a guide to ensure key items have been addressed and discussed.

Contractor:	Date:
Sign	Print
Homeowner:	Date:
Sign	Print