**Heat Pump Post Evaluation Checklist**

|  |  |
| --- | --- |
| **PROJECT INFORMATION** | |
| **Property Address:** |  |
| **Job# or Client ID:** |  |
| **Inspector Printed Name:** |  |
| **Inspector QCI Certification #:** |  |
| **Inspection Date:** |  |
| **Local code inspection(s):**  **(if applicable)** | Permit #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date Passed \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Permit #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date Passed \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

|  |  |
| --- | --- |
| **ENERGY AUDIT INFORMATION** | |
| Was an energy audit performed on this dwelling that included this installation? | ☐ Yes ☐ No |
| If yes, was the measure Savings to Investment (SIR) less than 1? | ☐ Yes ☐ No ☐N/A |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **EQUIPMENT INFORMATION** | | | | |
| Heat Pump Equipment Type: | Air to Air Split ☐ Air to Air Package ☐ Mini-Split ☐ Ground source ☐ Other:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | |
| Manufacturer: |  | | | |
| Model #: |  | | | |
| Serial #: |  | | | |
| System is Energy Star or equivalent? | ☐ Yes ☐ No | | | |
| SEER Rating: |  | Does this meet or exceed the SEER rating called for in the work order?  ☐ Yes ☐ No | | |
| HSPF Rating: |  | Does this meet or exceed the HSPF rating called for in the work order?  ☐ Yes ☐ No | | |
| COP Rating: |  | Does this meet or exceed the COP rating called for in the work order?  ☐ Yes ☐ No | | |
| Design load calculation result (i.e., Manual J) (kBTU/hr): | Heating Load: \_\_\_\_\_\_\_\_\_\_\_\_ Cooling Load: \_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | Load calculation based on post-retrofit dwelling characteristics. ☐ Yes ☐ No | |
| System installed capacity (kBTU/hr): | Heating: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Cooling: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | |
| Is the installed capacity more than 115% of load calculation? | ☐ Yes ☐ No | | | |
| Refrigerant Information: | Type: ☐ R134a ☐R407c ☐R410a ☐R600 ☐R600a ☐R717  ☐Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | Charge (lbs/oz): \_\_\_\_\_\_\_\_\_\_\_  Pipe Length (ft): \_\_\_\_\_\_\_\_\_\_\_ |
| Other Heating/Cooling systems in the Home: | ☐None ☐Central Forced Air ☐Window AC Units ☐Baseboard Heat  ☐Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Percentage of heating load provided by existing system(s): \_\_\_\_\_\_%  Percentage of cooling load provided by existing system(s): \_\_\_\_\_\_% | | | |
| COMMENTS: |  | | | |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **INSTALLATION** | | | | |
| **Yes** | **No** | **N/A** | **Verify by assessing, testing and/or reviewing contractor submitted documentation** | **Notes** |
|  |  |  | System is installed per work order/invoice and design documents |  |
|  |  |  | System is installed per manufacturer specifications |  |
|  |  |  | Changes to duct work are completed per work order |  |
|  |  |  | Major duct leaks within conditioned space have been sealed, and all duct leaks outside of conditioned space are sealed |  |
|  |  |  | Refrigerant lines are leak free |  |
|  |  |  | Air filter is present, clean, and meets equipment minimum MERV rating |  |
|  |  |  | Occupant(s), owner(s), and/or maintenance staff have been provided with at least one (1) replacement filter |  |
|  |  |  | Air-to-Air Split System meets minimum requirements set forth in [SWS 5.0108.1](https://sws.nrel.gov/spec/501081) |  |
|  |  |  | Air-to-Air Package Units meets minimum requirements set forth in [SWS 5.0108.2](https://sws.nrel.gov/spec/501082) |  |
|  |  |  | Mini-Split System meets minimum requirements set forth in [SWS 5.0108.3](https://sws.nrel.gov/spec/501083) |  |
|  |  |  | Thermostat installation meets minimum requirements set forth in [SWS 5.0101.1](https://sws.nrel.gov/spec/501011) |  |
|  |  |  | Refrigerant Line installation meets minimum requirements set forth in [SWS 5.0103.1](https://sws.nrel.gov/spec/501031) |  |
|  |  |  | Refrigerant Charge meets minimum requirements set forth in [SWS 5.0103.2](https://sws.nrel.gov/spec/501032) |  |
|  |  |  | Duct Sealing meets minimum requirements set forth in [SWS 5.0106](https://sws.nrel.gov/spec/50106) |  |
|  |  |  | Duct Installation meets minimum requirements set forth in [SWS 5.0104.1](https://sws.nrel.gov/spec/501041) |  |
| COMMENTS: | | |  | |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **PERFORMANCE** | | | | |
| **Yes** | **No** | **N/A** | **Verify by assessing, testing and/or reviewing contractor submitted documentation** | **Note** |
|  |  |  | Heat Pump system meets 100% of home’s heating load or a backup system is present |  |
|  |  |  | Unit passes duct leakage test, if required |  |
|  |  |  | Thermostat programming is complete and fully operational |  |
|  |  |  | Refrigerant charge commissioned per manufacturer’s specifications |  |
|  |  |  | Air flow requirements for heating and cooling modes meet the manufacturer specified CFM |  |
|  |  |  | Air flow is unrestricted from registers, ducts, indoor heads, etc. |  |
|  |  |  | Sub cool and superheat temperatures are within manufacturer specifications (see installer documentation) |  |
| COMMENTS: | | |  | |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **CLIENT EDUCATION** | | | | |
| **Yes** | **No** | **N/A** |  | **Note** |
|  |  |  | Occupant(s), owner(s), and/or maintenance staff have been provided with user’s manual, warranty information, installation instructions, and installer contact information |  |
|  |  |  | Client understands system operation (i.e., thermostat) |  |
| COMMENTS: | | |  | |

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of Inspector Date