Desk Inspection Checklist for Residential HVAC

Date: 01/13/2022
Content

1. HVAC Program
HVAC Program:

Desk Inspection Checklist for Residential HVAC

Installation:

Installation Type:
- Select the type of installation.
- Include clear document of AHRI Certificate.
- Attach installed new condenser wide angle photos.
- Attach new unit name plate.

Pre-existing Equipment Inventory:
- Enter the type of condenser unit being replaced with its operational status and the year on the name plate – (If plate is not legible enter “Unknown” in EEPM)
- Include image of existing unit name plate – (Legible or not legible).
- When replacing an electric resistance unit with a heat pump a photo of the existing furnace is required. The photo should include the entire furnace indicating no flue or gas line exists. Provide two photos if unable to capture the entire furnace in one.

Photo Upload Location:

Central Heat Pump
1. Follow number sequence for picture/document uploads,
2. If the replaced system was Electric Resistance “upload image of the entire Electric Furnace indicating no flue or gas line exists”.
3. Upload Image of New condenser unit name plate
4. Upload AHRI certificate for new system
5. Upload the wide-angle image of newly installed condenser.
6. Upload image of Existing unit name plate.
7. Select “Is Uploaded Existing Unit Name Plate Label Legible?” is “YES/NO”.

Upload AHRI certificate:
[Choose File] No file chosen

HSPF Level:
Select

EER:

Climate Zone:

Upload legible image of new unit name plate:
[Choose File] No file chosen

Picture of installed new condenser:
[Choose File] No file chosen

Wide angle Photo New Condenser

Upload Existing Unit Name Plate Label:
[Choose File] No file chosen

Sq Ft of the Conditioned area served by Retired unit

Is Uploaded Existing Unit Name Plate Label Legible?
Select

Upload Existing Electric Furnace indicating no flue or gas line exists:
[Choose File] No file chosen
Central Air Conditioner:
1. **Follow number sequence for picture/document uploads**
2. Upload Image of Existing condenser unit name plate – (Legible or not)
3. **Upload New equipment pictures in below sequence**
4. Upload AHRI certificate for new system
5. Upload image of new condenser unit name plate
6. Upload the wide-angle image of newly installed condenser.

Mini-Split Heat Pump:
1. **Follow number sequence for picture/document uploads**
2. If the replaced system was Electric Resistance “upload image of the entire Electric Furnace indicating no flue or gas line exists”.
3. Upload Image of New condenser unit name plate
4. Upload AHRI certificate for new system
5. Upload the wide-angle image of newly installed condenser.
6. Upload image of Existing unit name plate – (Legible or not).
7. Select “Is Uploaded Existing Unit Name Plate Label Legible?” is “YES/NO”.
8. Select “Unit Installed Type” as Mini Split HP or DC Inverter HP.
Important Note for Condenser Model number input:

After Entering the AHRI number and the unit data is auto populate from the AHRI database, you must enter the missing characters as displayed on the condenser label photo. The Condenser model and serial reported within EEPM must match the label.

EEPM Measure input screen:

Model number from Condenser label:
A photo of the existing and new condenser label is required for each site. Please upload a clear photo of the condenser label whether legible or not legible.

If reporting replacing an electric resistance unit with a heat pump - an option has been added within EEPM to report whether the existing condenser label is legible or not legible.

If reporting “label is legible” the model and serial number will be required for validation. If complete numbers cannot be reported, then the label is not legible. If inspection finds that the label is not legible and is reported legible, the measure will fail inspection and incentives/savings will be lowered.

If reporting “label is NOT legible” the incentives and savings will be lowered.

Operational requires a completely legible photo of the old condenser label; legible serial and model number required for operational status.

Photos of packing label, invoice or other photos are not an accepted form of verification. Only photo of the new nameplate of the installed unit can be approved.

### Residential Required Documents and Photos for HVAC

Each Column Contains the Required Documents/Photos Based on Type of Unit Installed/Replaced Whether Operational or Non Operational

<table>
<thead>
<tr>
<th>Central Air Conditioner w/ gas furnace - Replacing same type or Mini Split Air Conditioning replacing Central AC</th>
<th>Central or Mini Split Heat Pump Replacing Central Heat Pump</th>
<th>Heat Pump or Mini Split Replacing Central Electric Resistance Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Customer Agreement</td>
<td>Customer Agreement</td>
<td>Customer Agreement</td>
</tr>
<tr>
<td>2 Picture of old condenser label/faceplate</td>
<td>Picture of old condenser label/faceplate</td>
<td>Picture of old condenser label/faceplate</td>
</tr>
<tr>
<td>3</td>
<td>No picture of electric furnace required</td>
<td>No picture of electric furnace required</td>
</tr>
<tr>
<td>---</td>
<td>---------------------------------------</td>
<td>----------------------------------------</td>
</tr>
<tr>
<td>4</td>
<td>AHRI Certificate for new unit</td>
<td>AHRI Certificate for new unit</td>
</tr>
<tr>
<td>5</td>
<td>Picture of new condenser faceplate showing manufacturer, model and serial</td>
<td>Picture of new condenser faceplate showing manufacturer, model and serial</td>
</tr>
<tr>
<td>6</td>
<td>Wide picture of new condenser installed</td>
<td>Wide picture of new condenser installed</td>
</tr>
</tbody>
</table>
Help Desk Details:

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