Heat Pump
Summary Sheet

☐ **Emergency**
☐ Follow-up Needed
Client_____ Job #
Address_____ Phone #
City/Zip
Client Interview

	Pre Test	**Post Test**	**Inspection**
Indoor Manufacturer _____Model #_____Serial #			
☐ Upflow	☐ Downflow	☐ Horizontal Left	☐ Horizontal Right
Aux. Drain Pan	☐ Yes ☐ No	Pan Added	☐ Yes ☐ No
Kinks In Piping	☐ Yes ☐ No	Repaired	☐ Yes ☐ No
Insulated Vapor Pipe	☐ Yes ☐ No	Insulation Added	☐ Yes ☐ No
Condensate Line Trapped	☐ Yes ☐ No	Repaired	☐ Yes ☐ No
Describe Line Configuration and Termination			
CFM (From Page Two)	_____ CFM	_____ CFM	_____ CFM
Thermostat			
Level And Secure	☐ Yes ☐ No	Repaired	☐ Yes ☐ No
Anticipator 2nd Stage	Measured ____	Set At ____	Reset ____
Ductwork			
Leaky	☐ Yes ☐ No	Repaired	☐ Yes ☐ No
Disconnected	☐ Yes ☐ No	Repaired	☐ Yes ☐ No
In Unconditioned Space	☐ Yes ☐ No	Insulated	☐ Yes ☐ No
Filter/Blower			
Air Filter Condition	☐ Dirty ☐ Clean ☐ Missing	Replaced/Size_____	☐ Yes ☐ No
Blower Wheel	☐ Dirty ☐ Clean	Cleaned	☐ Yes ☐ No
Blower Motor	☐ Direct Drive ☐ Belt Drive	Speed Changed	☐ Yes ☐ No
Oil Cups Facing Up	☐ Yes ☐ No	Repaired	☐ Yes ☐ No
Fan Centered In Housing	☐ Yes ☐ No	Repaired	☐ Yes ☐ No
Coil Clean	☐ Yes ☐ No	Cleaned	☐ Yes ☐ No
Outdoor Manufacturer _____Model #_____Serial #			
Elevated Above Snow Line	☐ Yes ☐ No	Repaired	☐ Yes ☐ No
Unit Level	☐ Yes ☐ No	Repaired	☐ Yes ☐ No
Insulated Vapor Pipe	☐ Yes ☐ No	Insulated	☐ Yes ☐ No
Refrigerant Leaks	☐ Yes ☐ No	Repaired	☐ Yes ☐ No
Refrigerant Charge Checked In What Mode		☐ Heating	☐ Cooling
Refrigerant Charge Changed		☐ Yes ☐ No	
	____ PSIG Suction	____ PSIG Suction	____ PSIG Suction
	____ PSIG Discharge	____ PSIG Discharge	____ PSIG Discharge
	____ OAT___RAT	____ OAT___RAT	____ OAT___RAT

Technician _____ Date_____ Reviewer_____ Date_____ Inspector_____ Date

Water Heater	☐ Gas	☐ Electric	
T and P Relief Valve	☐ Yes ☐ No	Added	☐ Yes ☐ No
Gas Leaks	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Venting Problems	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Carbon Monoxide Indicators	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Carbon Monoxide	___/___PPM	___/___PPM	___/___PPM
Spillage	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Worst Case Draft/OAT	___"W.C.___^{0}F.	___"W.C.___^{0}F.	___"W.C.___^{0}F.
Water Temperature	_____^{0}F. Adjusted	☐ Yes ☐ No Final Temp.	_____^{0}F.

Comments

Specifications

Client Interview: Comments Regarding Operation, Cold Rooms, High Bills, Repairs, Adding Freon...Etc. **Auxiliary Drain Pan**: Required By Code If The Unit Is Located Above A Living Space. **Kinks In Piping:** None. **Refrigerant Leaks**: None. **Vapor Pipe Insulation**: Closed Cell Rubber Insulation Of A Minimum ½" Wall Thickness. **Condensate Line Trap**: Must Have One / If One Is Added It Should Be Vented On The Outlet.
Describe Line: Concerns Are Length, # Of Fittings, And Termination In Or Out Of The Drain.

CFM: (CFM = BTUH DIVIDED BY 1.08 TIMES TEMPERATURE RISE)

Pre Test _____Volts X _____Amps = _____watts X 3.413 = _____BTUH _____ =CFM
Supply _____^{O}F minus Return _____^{O}F = Δ T _____^{O}F X 1.08 =_____ | BTUH

Post Test_____ Volts X _____Amps = _____watts X 3.413 = _____BTUH _____ =CFM
Supply _____^{O}F minus Return _____^{O}F = Δ T _____^{O}F X 1.08 =_____ | BTUH

Inspect _____ Volts X _____Amps = _____watts X 3.413 = _____BTUH _____ =CFM
Supply _____^{O}F minus Return _____^{O}F = Δ T _____^{O}F X 1.08 =_____ | BTUH

* Note: These CFM Tests Are Done In The Emergency Heat Mode With The Fan On Continuously At Thermostat Subbase.
Anticipator: Set At Measured Amp Draw As Measured At The Thermostat. **Ductwork Leaky**: Repaired Using Appropriate Materials And Sealed Using Mastic And Mesh Tape. **Disconnected**: Reconnected And Sealed. **Unconditioned Space:** Insulate Using Minimum R-11 Duct Insulation. **Air Filter**: Must Have One / Prefer Washable Type That Client Knows How To Clean. **Blower Wheel/Motor**: Clean. **Coil**: Clean. **Elevated Outdoor Unit**: Should Have A Minimum Clearance Of 4"Above Anticipated Snow Depth. **Level:** Outdoor Unit Should Be Level In All Directions. **Refrigerant Charge**:AdjustedTo Meet Manufacturers Specifications. Tech Must Meet All EPA And Applicable Guidelines. **OAT**, Outside Air Temperature. **RAT**: Return Air Temperature. **Gas Leaks**: None. **Venting Problems**: Intact Or Repaired. **Monoxide Indicators**: No carbon, Flame Problems, White Flames. **Carbon Monoxide**: Less Than 100 PPM In The Flue And Checked On Both Sides Of The Baffle. **Spillage**: None Using Smoke Test.
Draft/ OAT: -.005"W.C. @ >80^{0}F, -.01"W.C. @ 30^{0}F To 80^{0}F, -.02"W.C. @ < 30^{0}F (Minimums).
Water Temperature: 120^{0}F / Mark The Dial At The Original Setting.

What You Should Know About Your Heat Pump

This Heat Pump Performance Modification improves the safety and efficiency of your heat pump and water heater. The work completed can save you money on your utility bills during the next year.

You can be more informed about the operation of the equipment and help to save money by reading and maintaining the following items that have been improved and checked.

____1. The blower has been cleaned. This will allow for better air flow and greater efficiency. It should be cleaned whenever it starts to get dirty.

____2. The filter has been changed / washed. A clean filter allows air through the heat pump. No air means heat pump service and higher utility bills. Your filter should be replaced if it is a throw away type or washed if it is reusable every month.

____3. The blower motor (☐ has ☐ has not) been oiled. If the motor can be oiled, it needs 3-5 drops of oil in each port once a year. Do not over oil as this can damage the motor.

____4. The coil has been cleaned. This is also necessary for good air flow and heat transfer.

____5. Checked for blocked supply registers and return air grilles. Do not close registers. Also checked for seasonal direction of registers if applicable.

____6. Sealed and connected leaky ducts. Now the heat is being delivered to the house where you want it. The ducts have also been insulated if they run in an unconditioned space.

____7. The thermostat has been adjusted for optimum performance. It is not necessary to set the thermostat back at night. Emergency heat should not be used unless the outdoor unit is broken.

____8. The drain line has been checked for operation. If you ever notice water around the indoor unit, there is a drain problem that needs repair.

____9. The vapor pipes have been insulated and the refrigerant charge checked and adjusted for peak performance of the heat pump.

____10. Turned down the hot water temperature. This can save you money. The dial is marked at your old setting. If you need hotter water, turn it up just a little bit, but not higher than the mark.
Hot water temperature_____ ^{0}F

____11. If you have a gas water heater, it has been checked for gas leaks, venting safety, and carbon monoxide.

____12. Additional work performed:_____
Additional information: During the defrost cycle it is normal to see the outdoor unit shrouded in steam. Also, try to be aware of the outdoor unit not operating so you are not constantly heating with expensive electric strip heat.
If you have any problems or questions, please call the office at the number listed below.
Tune up performed by: _____ Ph.#_____ Date ___/___/