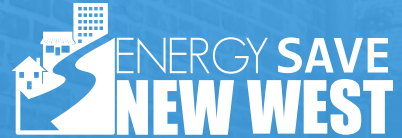




# HOMEOWNER CHECKLIST

# HEAT PUMPS



Following this checklist will help ensure you make the proper considerations when installing a new heat pump



## STEP 1 PRE-CHANGEOUT STAGE

- COMFORT & EXPERIENCE** – Discuss your experiences with the existing heating system. Let your contractor know how the HVAC system has been working and what your concerns/preferences are.
- EXISTING DISTRIBUTION SYSTEMS** – Your contractor should examine the existing ductwork capacity and perform air flow and static pressure testing (for central system).
- EXISTING ELECTRICAL PANEL/SERVICE** – You may need to upgrade your existing electrical panel and/or service. Speak to your contractor or electrician to determine potential upgrade requirements or alternative options (e.g. energy management system).
- ENVELOPE PERFORMANCE/AIRTIGHTNESS** – If your home's heat demand is too high, you may want to consider upgrading your windows/doors, insulation, or improving air tightness before installing a new heat pump.



## STEP 2 DESIGN & EQUIPMENT SELECTION

- LOAD CALCULATION AND EQUIPMENT SIZING** – Ensure your equipment has been selected based on a proper heat loss/heat gain calculation using the CSA F280 method.
- NOISE AND PLACEMENT** – Some heat pumps are quieter than others. Consider choosing a quieter model when you have space limitation for placement and/or noise limits set by the local government. You can also inquire your contractor about noise mitigation strategies.
- AESTHETICS** – Consult with your contractor to minimize visibility of external pipes and tubes. If you're concerned about visibility of the outdoor unit, consider installing a cover that matches your home's external cladding or placing a privacy/planter box screen. Keep in mind that you still need to maintain free airflow for your heat pump to extract heat from surrounding air.
- BUDGET** – Equipment/upfront costs can largely vary depending on equipment type and performance factors. However, when selecting a heat pump, operational costs should also be considered as some heat pumps can reduce or eliminate the use of less efficient supplementary heating.
- SUPPLEMENTARY HEATING** – In some cases either integrated or independent auxiliary or back-up heating may be required. Consult with your contractor for type and location of heat source(s).

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## STEP 3 QUOTE REVIEW

- **PRODUCT MODEL WITH PERFORMANCE CREDENTIALS** – Check how efficient your heat pump is at various outdoor temperatures.
- **CONFIRMATION OF REBATES** – Not all heat pumps qualify for the rebates. Check with your contractor if the proposed equipment is eligible for government and utility rebates and meets program requirements.
- **WARRANTY** – Check your warranty period for parts, compressor and labour.
- **POTENTIAL EXTRA COSTS** – Understand what exactly is included in the quote and ask your contractor if there will be any unforeseen extra charges involved.



## STEP 4 QUALITY INSTALLATION

- **DUCT ENHANCEMENTS AND PROPER DUCT SEALING** – Confirm with your contractor if your ductwork has been enhanced as proposed and properly sealed.
- **REFRIGERANT LINE SET** – Check if the entire length of refrigerant line has been covered by insulation to avoid condensation and decreased efficiency and is also fully protected from UV. All penetrations through the shell of the home (i.e. floor, wall, ceiling) should be properly sealed with insulating sealant/spray foam.
- **FILTRATION** – Good filtration means minimum 4-inch pleated filters (for central systems) with Minimum Efficiency Reporting Values (MERV) rating 8 or higher. Ductless or mini/multi split units require custom-sized filters. Confirm filter maintenance requirements with your contractor.
- **OUTDOOR EQUIPMENT** – Ensure the outdoor unit is installed above anticipated snow level and equipped with a vibration isolator (e.g. waffle pads).
- **CONDENSATION PIPE** – Check if a condensate pipe is connected to a drain or pump (for central system).
- **MATCHING CONTROLS** – Ensure your contractor has installed matching controls and wired them correctly.



## STEP 5 COMMISSIONING & PERFORMANCE VERIFICATION

- **COMMISSIONING CHECKLIST** – Your contractor is responsible for completing all equipment start-up procedures and documentation of results during commissioning of your new heat pump. This process ensures the system to operate at its optimal performance.
- **WARRANTY COVERAGE** – Your contractor should also complete warranty coverage of the heat pump system and control system including servicing requirements for compliance with warranty policy.
- **ELECTRICAL** – Check if all electrical circuits have been correctly labeled.
- **HOMEOWNER EDUCATION AND WALKTHROUGH** – Ask your contractor to give you a walkthrough of the new system operation/controls and maintenance.
- **DOCUMENTATION** - All documentation should be stored in a tabbed binder including equipment specifications and cut sheets, warrantee documents, start-up/commissioning checklists, maintenance schedules and user manuals.

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