



This U.S. Department of Energy checklist includes important specifications that can contribute to a complete and quality installation. All work shall comply with these specifications, all relevant codes and standards, and all manufacturer installation instructions. The contractor shall check each box on the checklist below and sign and date at the bottom to certify the work is completed.

PREPARATION

- All exposed ducts (e.g., attic, basement, and crawlspace) shall be inspected; all damaged or disconnected ducts shall be repaired or replaced; and all visible leaks shall be sealed with UL 181 tape and/or mastic.
- A room-by-room load calculation shall be performed as described in the Air-Conditioning Contractors of America (ACCA) Manual J.
- The air conditioner selected shall be ENERGY STAR-certified and sized in accordance with ACCA Manual S based on ACCA Manual J load calculation results.
- The system shall be evaluated to determine if the supply and return air flows are balanced and if ducts are properly sized.
- Recommendations shall be made to the homeowner if the ducts are not the right size.

INSTALLATION

- The air conditioner shall be installed in accordance with ANSI/ACCA Standard 5 HVAC Quality Installation Specifications.
- The air filter shall be replaced with a MERV 8 or higher filter selected for appropriate air flow across the coil.
- If the air filter is installed in a filter media box attached to the air handler, the access panel for the filter should be fitted with a flexible, air-tight gasket to prevent air leakage.
- Where a new thermostat location is to be provided, it shall be located on an interior wall away from heating or cooling registers, appliances, lighting fixtures, exterior doors, skylights, windows, and areas that receive direct sunlight or drafts.

COMMISSIONING

- Proper refrigerant charge shall be verified in accordance with the manufacturer's instructions.
- Pressure balance testing (pressure pan and/or flow hood) for proper room-to-room air flow shall be performed and adjustments shall be made to address any imbalances.
- Air flow across the coil shall be tested following procedures approved by ANSI/ACCA Standard 5 QI-2015 to verify it is within the CFM range specified by the equipment manufacturer. If it is not, adjustments shall be made as required.
- The home shall be inspected for the presence of a whole-house ventilation system. If one is present, the actual air flow shall be tested and verified to meet or exceed a target ventilation rate based on house size as follows: 50 cfm for up to 1,500 ft², 70 cfm for 1,501 to 2,500 ft², and 100 cfm over 2,500 ft², per ASHRAE 62.2-2013. Recommendations shall be made to the homeowner for either installing a new whole-house ventilation system compliant with the target rate if one is not present, or repairing an existing system to be compliant with the target rate if airflow is not adequate.

I hereby certify that, to the best of my knowledge and ability, all checked items on the above checklist have been accomplished as part of completion of this home upgrade.

Contractor Signature: _____ Date: _____

Contracting Organization: _____

THE U.S. DEPARTMENT OF ENERGY DOES NOT WARRANT OR ENDORSE THE WORK, PRODUCTS, OR SERVICES OF ANY OF ITS PARTNERS.