



Quality HVAC Program | Quality Maintenance Call Tier I Checklist

Company Name & CSLB Number:

Household Last Name & Street Number:

Customer email:

Service Date:

DIRECTIONS: This comprehensive checklist is to be completed onsite and uploaded to Iris. Certain key findings -- indicated by thick boxes below -- must be reviewed with and signed off by the customer. This customer review can be done using this checklist or via the Quality Service Report you will get by email. The key findings must also be entered in the online form at https://frontierenergy.formstack.com/forms/qmc_i

TESTS

Static Pressure	Results	81	Supply Static Pressure		IWC	= Supply SP - return SP; ≤ 0.7 required if ductwork is new
		82	Return Static Pressure		IWC	
		83	Total External Static Pressure		IWC	
Temperature Split	System Mode During Test	86	<input type="radio"/> Heating Mode			For heating = supply - return, ideally 25-65 For cooling = return - supply, ideally 15-25
		87	<input type="radio"/> Cooling Mode			
	Results	89	Supply Air Temperature		°F	
		90	Return Air Temperature		°F	
		91	Temperature Split		°F	
Charge Test	Rationale for Test	109	<input type="checkbox"/> Confirmed that Charge Test was Warranted		All sections must be completed. If they are Not Applicable, write "NA" and add an explanation in the comments box.	
		110	<input type="checkbox"/> Bad temperature split			
		111	<input type="checkbox"/> Comfort complaints across rooms			
		112	<input type="checkbox"/> Observed presence of oil suggesting leaks			
		113	<input type="checkbox"/> Other (please explain in comments box)			
		115	<input type="checkbox"/> Did Troubleshooting Before Charge Test			
			116	<input type="checkbox"/> Restricted filter flow		
			117	<input type="checkbox"/> Collapsed/disconnected ductwork		
			118	<input type="checkbox"/> High TESP		
			119	<input type="checkbox"/> High DP across coil		
			120	<input type="checkbox"/> Ducts are too small		
		Test Procedure	122	Was Lowest Outdoor Air Temperature <55°F?		<input type="radio"/> Yes <input type="radio"/> No
	125		If YES, how was test done?			
	126		<input type="checkbox"/> In cooling mode with condenser outlet restrictor			
	127		<input type="checkbox"/> Evacuated and used weigh in method			
	128		<input type="checkbox"/> Made plans to return when temperatures are higher			
		129	<input type="checkbox"/> Other (please explain)			
		130	Metering Device and Test Completed: <input type="radio"/> TXV/EXV: did SC test <input type="radio"/> Fixed Orifice: did SH test			
	Results	132	Target SC or SH	°F	= refrigerant line temp - saturation temp = target - measured SC or SH; ideally 0	
		133	Measured SC or SH	°F		
		134	Difference from Target	°F		
	Diagnosis	136	<input type="checkbox"/> Charge OK			
		137	<input type="checkbox"/> Charge Too High			
		138	<input type="checkbox"/> Charge Too Low			
		139	<input type="checkbox"/> Another Problem			
	Resulting Action Taken	141	<input type="checkbox"/> Discussed with Customer		If added or recovered charge, must also address in the Refrigerant Management section (field #301), including taking a photo.	
		142	<input type="checkbox"/> Recovered Charge			
		143	<input type="checkbox"/> Added Charge			
		144	<input type="checkbox"/> Provided Bid			
		145	<input type="checkbox"/> No Adjustment Made			

TEST Comments, Recommendations, and/or NA Explanation	147		<div style="border: 1px solid black; border-radius: 10px; padding: 5px; width: fit-content;"> Enter anything the customer should know and explain anything that is Not Applicable (NA) </div>

ADJUSTMENTS

Thermostat and Programming	Talked to Occupant About...	241	<input type="checkbox"/> Thoughts on Current Thermostat and Settings	<div style="border: 1px solid black; border-radius: 10px; padding: 5px; width: fit-content;"> Including Demand Response, Setbacks, Precooling, Thermostat Eco Modes. </div>
		242	<input type="checkbox"/> Current Strategies for Controlling Temperatures	
		243	<input type="checkbox"/> Interest in Advanced Strategies	
		244	<input type="checkbox"/> Recommended Thermostat Schedule	
		245	<input type="checkbox"/> Other Recommendations, ex. Thermostat Upgrade	
	Adjusted and Confirmed	247	<input type="checkbox"/> Checked Sensor Calibration and Adjusted as Needed	
		248	<input type="checkbox"/> Reviewed Programming	
	Scheduled Program	250	<input type="checkbox"/> NA – Not Needed, Already Efficiently Programmed	
		251	<input type="checkbox"/> Offered but Customer Declined	
		252	<input type="checkbox"/> Thermostat Schedule Programmed	
	Program & Overrides	254	<input type="checkbox"/> Offered Instruction but Customer Declined	
		255	<input type="checkbox"/> Programming and Override Instruction Provided	
Setup App or WiFi	259	<input type="checkbox"/> Offered Assistance but Customer Declined		
	260	<input type="checkbox"/> Assisted Customer in Installing or Connecting App		
Uploads	262	<input type="checkbox"/> PDF or Photo of Recommended or Final Programming		

Evacuation and Charging	Refrigerant Management	298	Refrigerant Type	
		299	Cannister Weight Before Adjustment	lb:oz
		300	Cannister Weight After Adjustment	lb:oz
		301	Amount of Refrigerant Added or Recovered	±lb:oz
		302	<input type="checkbox"/> Upload Photo of Scale After Charging, or Final SC/SH	
		303	Name of Technician	
		304	Date	
		305	Serial Number of Equipment that was Adjusted	
306	Serial Number of Cannister			

Condenser Coils	Cleaning Criteria	310	<input type="checkbox"/> Condenser Coil Cleaning Met all Following Criteria:
		311	<input type="checkbox"/> High pressure cleaning system was not used
		312	<input type="checkbox"/> Caustic or fuming coil cleaning chemicals not used
		313	<input type="checkbox"/> Flushed with water

ADJUSTMENT Comments, Recommendations, and/or NA Explanation	314	
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SERVICE COMPLETION

Other Programs	Referral to Other Programs	344a	Review the following programs with the customer: <input type="checkbox"/> TECH Clean California: \$1,000 incentives for new single family heat pump HVAC systems (up to two systems per home). Requirements: 1) must be a TECH-enrolled contractor, 2) project must be a non-heat pump to heat pump installation, 3) no new construction, retrofits only, 4) equipment must be AHRI matched systems, and 5) equipment must meet Title 24 code minimum standards. See https://techcleanca.com/ .
		344b	<input type="checkbox"/> GoGreen Financing: GoGreen Home provides California residents with financing for energy efficiency upgrades with zero fees or closing costs and some of the best rates available. Eligibility requires that the property receive electric or natural gas service from PG&E, SDG&E, SCE, or SoCalGas. See https://gogreenfinancing.com/ .
		344c	<input type="checkbox"/> Self-Generation Incentive Program: SGIP provides incentives for the installation of qualifying on-site power generation and storage technologies. The current residential incentive is \$0.15 per Wh-AC of the system. Advanced approval and funding reservation is required. The program is implemented by your IOU (PG&E, SDG&E, SCE, or SoCalGas). See https://www.selfgenca.com/ , or research your IOU's website.

COMPLETION

Comments,
Recommendations,
and/or NA
Explanation

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SIGNATURES

- Electronic signatures will be uploaded later, after review of the emailed Quality Service Report, at:
https://frontierenergy.formstack.com/forms/qhvac_claim_signature_attachment
- Signatures have been obtained below after review of boxed values in this checklist

Customer Name

Technician Name

Customer Signature

Technician Signature

I hereby certify that I reviewed the above key findings with the technician. I understand that this does not signify that I am selecting this contractor or accepting this bid.

I hereby certify that I reviewed the above key findings with the home decision maker.

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