Air Source Heat Pump Checklist

	Existing Furnace	Existing Air Conditioner	New Air Source Heat Pump	Notes
Make				
Model				
Age of equipment			N/A	Googling the serial number of your equipment can help determine the year it was manufactured.
Approx. how many years until the equipment requires replacing	(15 – current age) = years remaining approx. _____ years	(15 – current age) = years remaining approx. _____ years	N/A	If your existing equipment has less than 3 years of its expected lifespan, you should plan for its replacement, before it fails.
Means of Heating	Electric Resistive ☐ Natural Gas ☐ Other _____	N/A	Heat Pump ☐ Hybrid Heat Pump ☐ Backup Electric ☐ Other _____	
Means of Cooling	N/A	Electric ☐ Other _____		
Operating Modes	Single Stage ☐ Modulating Burner ☐	Single Stage ☐ Modulating Compressor ☐	Heat Pump Only ☐ Hybrid ☐ Backup Electric ☐ Other _____	
Heating Capacity	_____BTU _____kW	N/A	_____BTU _____kW	Make sure the ASHP is sized based on the <u>calculated</u> heating load of the home. Most existing furnaces are oversized. Calculated heating load is ___ BTU

Cooling Capacity	N/A	_____BTU _____Tons	_____BTU _____tons	Make sure the ASHP is sized based on the calculated cooling load of the home. Most existing AC's are oversized. Calculated cooling load is _____BTU or _____tons
Unit Efficiency	GAS AFUE: _____ Typical Hi Eff = 90-98% Typical Mi Eff = 78-82% Electric Eff: _____ Typical = 100% Oil Furnace AFUE: ___ Typical = 83%	SEER: _____ EER: _____ COP: _____ Varies based on make, model and age.	Heat SEER: _____ EER: _____ COP: _____ HSPF: _____ Cool SEER: _____ EER: _____ COP: _____	Searching your old AC make and model online will provide documentation regarding its EER/SEER rating. Notice the difference in operating efficiency associated with a heat pump unit, since the system moves heat rather than generating it.
Est Annual Operating Costs	$_____ Avg Gas = $710 Avg Oil = $2,400 Avg EBB = $2,011	$_____ Avg AC = $178-214	$_____ Avg = $1,000 Varies based on make, model	
Reason for Replacement	Failed unexpectedly ☐ Reaching end of life ☐ Other _____	Failed unexpectedly ☐ Reaching end of life ☐ Other _____	N/A	
System will be ducted or ductless (split)?	Ductwork existing Yes ☐ No ☐	Ductwork existing Yes ☐ No ☐	Ductwork requirements satisfied Yes ☐ No ☐	In most cases the indoor portion of the ASHP will replace the existing furnace and make use of the existing ductwork for air distribution
Space available for outdoor unit?	N/A	Yes ☐ No ☐	Yes ☐ No ☐	The outdoor portion of the ASHP is typically installed in the same location as the AC unit once it is removed

Electrical Requirements of water heater	120VAC 15Amp ☐ 120VAC 20Amp ☐ 240VAC 25 Amp ☐ 240VAC 30Amp ☐ 240VAC 40Amp ☐	120VAC 15Amp ☐ 120VAC 20Amp ☐ 240VAC 25 Amp ☐ 240VAC 30Amp ☐ 240VAC 40Amp ☐	**Indoor:** 120VAC 15Amp ☐ 120VAC 20Amp ☐ 240VAC 25 Amp ☐ 240VAC 30Amp ☐ 240VAC 40Amp ☐ **Outdoor:** 120VAC 15Amp ☐ 120VAC 20Amp ☐ 240VAC 25 Amp ☐ 240VAC 30Amp ☐ 240VAC 40Amp ☐	The indoor portion of the ASHP typically requires 120VAC, while the outdoor portion typically requires 240VAC
Ability to connect ASHP to desired thermostat?	Yes ☐ No ☐	N/A	Yes ☐ No ☐	Some ASHP require a unique thermostat provided by the manufacturer
Installation Cost	N/A	N/A	Parts _____ Labor_____ Total_____	
Available Incentives/rebates	N/A	N/A	Yes ☐ No ☐	
Warranty	N/A	N/A	Years _____	