

**Return Form To:**

Utility Name  
 Address  
 City/State/Zip  
 Email  
 Fax

## Ducted Air-Source Heat Pump Data Collection Tool

This form can be used to document installation information for homes converting to a ducted air-source heat pump (ASHP) and a ducted variable-speed heat pump (VSHP), or homes upgrading to a ducted VSHP. All sections must be completed by the installer at the time of installation.

**Documentation to submit with this form:**

- Copy of this completed form
- Purchase receipt or invoice, including the heat pump make and model number
- AHRI Certificate
- If the units has a variable-speed compressor, include manufacturer documentation that the outdoor compressor includes variable-speed or inverter driven technology (e.g. specification sheet, brochure, or screen shot). Note: Including the text “variable-speed” on the invoice will not satisfy this requirement. Additional documentation is required.)

**Eligibility**

- Available for existing single-family and existing manufactured homes
- Heat pumps must be AHRI rated and meet current federal minimum standards for HSPF2 and SEER2
  - *If the unit only has an HSPF and SEER value, please contact the utility for verification of eligibility*
- For a conversion to an ASHP or VSHP, existing heating system type must be an electric forced air furnace, with or without air-conditioning.
- For an upgrade to a VSHP, existing heating system can be a DHP, ASHP, Zonal electric, Wood/Oil/Propane/Gas, or no existing heating

**Site Information**

Company Name		Technician Name (Optional)		Customer's Electric Utility	
Install Date	Install Site Address		Site City	Site State	Site Zip
Home Type	Single Family Existing	Manufactured Existing <small>*new manufactured homes are treated as existing once located at their site for occupancy</small>		Heated Area <span style="float: right;">Sq Ft</span>	
Existing Heating System Being Replaced					
Electric Forced Air Furnace without AC		Electric Forced Air Furnace with AC		Electric Zonal	
Air Source Heat Pump		Ductless Heat Pump		Ground Source Heat Pump	
Non -Electric Space Heating <small>(Wood/Oil/Propane/Gas)</small>		No Heating			

**New Heat Pump Equipment Data**

\*Check with utility for efficiency requirements beyond current federal minimum standards

AHRI Certificate #	SEER2*	HSPF2*
Heat Pump Manufacturer	Outdoor HP Model #	Indoor HP Model #
Outdoor HP Capacity (tons) (optional)	Non-Variable Speed HP Compressor	Variable Speed (or inverter-driven) HP Compressor

## Controls

HP Thermostat Make	HP Thermostat Model #
Auxiliary heat lockout does not engage at outdoor temperatures above 35°F or 5°F above balance point temperature?  <b>YES</b> <b>NO</b> If no, what is the temperature setting?	

## Notes

Utility: Please include any additional documentation requirements here