2016-2017 Santee Cooper Commercial Prescriptive Rebate Program

HVAC Tune-up Form

Sheet Number ____ of _____ Total Number of Units Tuned-Up _____

INSTRUCTIONS

1) HVAC tune-ups must be serviced and tested in accordance with the requirements specified within the 2016-2017 Commercial Prescriptive Rebate Program Manual guidelines.
2) The Program pays HVAC Tune-up rebates directly to the Trade Ally or non-Trade Ally contractor. All contractors (Trade Ally or non-Trade Ally) must submit a copy of this HVAC Tune-up form (customer signature is not required).
3) This form must be signed by the service technician who performed the system measurements and verified all data.
4) Actions taken during HVAC tune-ups are intended to reduce energy consumption through improved efficiency.
5) As this rebate is paid directly to the contractor to help offset the additional costs of performing a proper HVAC tune-up, an IRS 1099 will be issued to contractor to report income (if over $600). Check with your tax professional for your tax implications.

CONTRACTOR'S INFORMATION

HVAC Contractor's Name _____

Technician's Name (printed) _____

Certification# (if applicable) _____

Date of tune-up _____

Federal Tax ID (EIN) _____

CUSTOMER'S INFORMATION

Customer's Name _____

Meter Base No. _____

Customer's Phone # (_____) _____

Project Site Address _____

_____

STEP 1-CONDENSING UNIT (SPLIT SYSTEMS) OR PACKAGE UNIT INFORMATION

Unit No.	Make (Brand)	Model Number	Unit Location or Designation & Area Served (Identifying it from other units at this location)	Is refrig. pipe insul. missing/deteriorated	Was pipe insul. replaced	Tons
1						
2						
3						
4						

STEP 2-MATCHING AIR HANDLER (FAN/COIL) INFORMATION

Unit No.	Make (Brand)	Model Number	Air Handler Unit Location (where is it located in the building)	Strip Heat kW (if avail.)	Condensate Drain has P-trap & flows freely
1					
2					
3					
4					

STEP 3-CONTROLS

Unit No.	Measured Control Volts	Clg Set Point	Htg. Set Point	Does t'stat turn unit on/off at set points (Y/N)	If no, was t'stat repaired/replaced (Y/N/)	Is t'stat mounted on outside wall or near heat source	If yes, was t'stat insulated from outside wall, moved or was heat source moved
1							
2							
3							
4							

STEP-4 ELECTRICAL POWER

Unit No.	Volts with Unit On	Compressor Rated Amps	Compressor Actual Amps	Was Comp. replaced	OD Fan Rated Amps	OD Fan Actual Amps	Was OD fan replaced	ID Fan Rated Amps	ID Fan Actual Amps	Was ID Fan replaced
1										
2										
3										
4										

STEP 5-FANS AND AIR FLOW

Unit No.	Filter(s) Cleaned or Replaced	ID Coil Cleaned	OD Coil Cleaned	Measured Air Handler CFM	Method of Measuring CFM*	Outside Temp.	Measured Cooling TD Across Indoor Coil**	CFM Per Cooling Tons	Was CFM Adjusted to 350-425 CFM/ton
1									
2									
3									
4									

* (1)Static Pressure & Blower Table; (2) Anemometer (with grille manufacturer's free area); (3)pressure matching (using duct blaster)

** Check TD after 5-10 minutes cooling run time. If cooling TD across evaporator coil is less than 17^0 or greater than 21^0 (and airflow is correct), refrigerant charge must be checked using Method 1 or 2 shown in STEP 6. When the outdoor temperature is below 55^0, the charge must be checked on all heat pumps using method 3. Otherwise proceed to step 7.

STEP 6-REFRIGERANT CHARGE (REQUIRED IF EVAP. COIL COOLING TD IS <17^0 OR >21^0)

			METHOD 1[1]		METHOD 2[2]		METHOD 3[5] (Req. for HP's)		
Unit No.	Refrig Type	Outside Temp.	Measured Super-heat (before/after)	Manuf. listed Super-heat	Measured sub-cooling (before/after)	Manuf. listed sub-cooling	Comp. Discharge Temperature[3] (before/after)	Discharge Temp minus Outside temp[4] (before/after)	Was Refrig. Added or removed
1									
2									
3									
4									

[1] Recommended for units with fixed orifice metering device (record super-heat before and after any refrigerant charge change)

[2] Recommended for units with Thermal Expansion Valve (record sub-cooling before and after any refrigerant charge change)

[3] Required for all heat pumps when outside temperature < =55^0 (record temperatures before and after any refrigerant change)

[4] Discharge temp minus the ambient temp should equal 110^0-125^0 Fahrenheit for properly charged system

[5] Manufacturer's heat pump heating charge table may be used (submit a copy of table with tune-up form)

STEP 7-TECHNICIAN'S SIGNATURE

I hereby certify that all HVAC equipment has been serviced in accordance with the manufacturer's guidelines, and that all the above information is accurate. Contractor agrees to hold Santee Cooper harmless for any damages incurred as a result of contractor's negligence. I understand that Santee Cooper requires a completed copy of this document prior to final processing of rebate requests.

Signature: _____ Date: _____