

Heating & Air Conditioning Installation Bid Comparison Checklist

When you purchase a new heating or cooling system, you expect high performance. Unfortunately, more than half of new systems in U.S. homes do not perform to their rated efficiency as a result of improper installation. In fact, improper installation can reduce performance by as much as 30%. This not only affects your utility bills, but can lead to a variety of comfort problems, including insufficient dehumidification, dust from leaking ductwork, and poor air distribution.

Ask the contractors bidding for your business if they follow ENERGY STAR® Quality Installation Guidelines (www.energystar.gov/qispec) to ensure that you are not buying just a piece of equipment but a properly installed heating and cooling system that provides comfort and efficiency. Ask the following questions to each contractor:

Contractor A: _____ Contractor B: _____ Contractor C: _____

Contact: _____ Contact: _____ Contact: _____

Phone: _____ Phone: _____ Phone: _____

EQUIPMENT

	A	B	C
Do you offer ENERGY STAR qualified equipment?			
Will you measure my home and calculate the correct size for my equipment using Manual J? ¹			
Will you install a properly matched indoor coil and outdoor unit? ² (AC & heat pump only)			
Will you test to determine the maximum system size that can be installed with my existing ductwork?			
Will you install new refrigerant lines rather than reusing existing lines?			
Will you install and help me to set up a programmable thermostat (if not already in use)?			
Will you consider if zoning, with separate temperature controls for different areas, would be appropriate for my home?			
Will you provide me with information on any local rebate programs for which I might be eligible?			

DUCT WORK

Will you check for damage to existing ductwork and duct insulation, and make repairs if necessary?			
If insulating ducts, will you seal all duct seams first?			
Will you test to confirm that duct leakage does not exceed recommended levels? ³			

VERIFICATION & MAINTENANCE

Will you show me how to replace the air filter(s) in my new system?			
After installation, will you leave all manuals with me and provide documentation of installation procedures, including Manual J calculations, AHRI certificate, and records of any measurements or testing?			
Do you offer third-party verification that my system was properly installed and set up?			
Will you confirm proper levels of refrigerant and airflow across the coil? (AC & heat pump only)			

NOTES

¹ Proper equipment size is vital for maximizing efficiency and comfort. To size your new system, the contractor should calculate your home's heating and cooling loads using the Air Conditioning Contractors of America (ACCA) Manual J or equivalent.

² Your contractor should provide an Air Conditioning, Heating and Refrigeration Institute (AHRI) certificate to document that your system was properly matched.

³ Duct sealing is essential to the operation of your heating and cooling system. In most cases, it is recommended that total duct leakage be no more than 20%.