



PTCS

Performance Tested
Comfort Systems

Wednesday, June 3rd 2009

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Purpose of this Brown Bag

▶ To hear from utilities

- What has been working well
- What has not been working so well
- What is being done to make things better
- What else can be done to improve

▶ Address questions regarding the PTCS process

- What is the process?
- Who is responsible for different steps?

▶ To highlight recent changes to the PTCS registry and future changes to the website

Agenda

▶ The PTCS Website & the PTCS Registry

- What is on the website
- How to find & access the registry
- Online sizing calculator

▶ Recent Changes To The PTCS Registry

- Payment Eligibility Column
 - Accepted
 - Pending
 - Rejected
- Status Fields
- 30, 60, & 90 days

▶ Process & Flow

- Faxing, emailing, mailing forms
- Where, how, & when are jobs qualified & entered

▶ Questions

▶ The Future

The Website & The Registry

The website: www.ptcsnw.com

- General program information
- Class listings / announcements
- Heat Pump & Duct Seal Certificates (forms)
- Specifications & Technical Documents
- Master Technician Information
- Certified Technician Search Page
- Online heat pump sizing calculator

The registry: www.ptcsnw.com/forms

- Job list by utility
 - Pending, Accepted & Rejected
- Detailed view of job
 - Notes
 - ID Number

www.ptcsnw.com

PTCS Home - Windows Internet Explorer

http://www.ptcsnw.com/

File Edit View Favorites Tools Help

PTCS Home

Performance Tested Comfort Systems Northwest

Home Certified Technicians

New fax number: 1-877-848-4074

Events / Classes

Events

No event listings at this time.

Contact:
mneil@ecosconsulting.com
(503) 525 - 2700 x155

Welcome to Ecos Consulting's website designed to support contractors and utilities who are implementing Heat Pump and Duct Sealing programs based on Performance Tested Comfort Systems (PTCS™) standards.

The purpose of this website is to allow contractors and utilities to verify that particular technicians are certified to PTCS standards and to provide information that will help technicians meet standards.

[Download the new Heat Pump form \(v3\) here](#)

[Download the new Duct Sealing form here](#)

Forms

The Oregon Residential Tax Credit program accepts PTCS heat pump commissioning tests, but contractors must first apply to be listed as tax credit certified technician in order to qualify the installation for the tax credit. [Click here](#) for information about becoming an Oregon tax credit certified technician.

Program Standards and Examples

Below are the technical standards for PTCS™ Duct Sealing and Heat Pump Commissioning. Click on the links to download the files in Adobe Acrobat format.

- [Air-Source Heat Pump System Installation Standards](#)
- [Duct Program Standards and Testing Procedures](#)
- [Example of a completed Heat Pump commissioning field form](#)
- [Notes on Auxiliary Heat Controls and Thermostat](#)
- [Airflow Test Detailed Instructions](#)
- [Heat Pump Air Handlers_ Old School vs New School](#)
- [Strip Heat Cut-Out Thermostat Installation Procedure](#)
- [Heat Pump Field Form Detailed Instructions](#)
- [Heat Pump Sizing Calculator](#)

Links to Specifications

Sizing Calculator

Certified Technicians

To check your PTCS™ Certification number, click on the "Certified Technicians" tab above.

The Certified Technician database contains names of technicians that have been trained over the last 5-10 years, and designates what type of systems they are certified to work on (e.g. Duct Sealing in existing homes, Heat Pumps, etc). It has been compiled from various sources, such as Oregon Department of Energy, NEEA, WSU, Proctor Engineering, and Climate Crafters.

Master Technician Training Path

- [Master Technician Information Sheet](#)
- [Master Technician Application Form](#)

If you have any questions about the registry please contact:

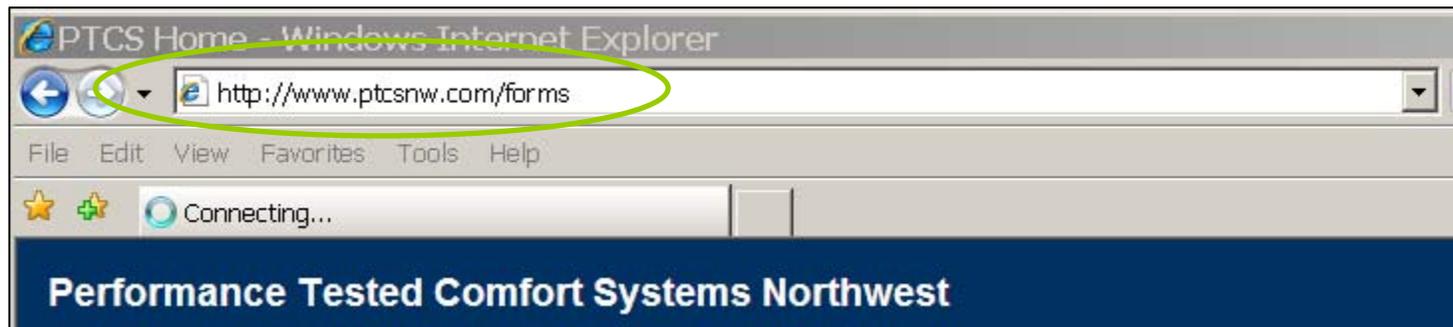
www.ptcsnw.com

Online Heat Pump Sizing Calculator

http://www.ptcsnw.com/downloads/HPSizeCalc_3_6.xls

The Registry: www.ptcsnw.com/forms

There is no direct link to the registry from the website!
You have to type in the address in the address bar.



This will bring up a login request box, enter your username & password to access the registry.

If you do not have your login information, or if you have misplaced it, please email Andres Morrison at:

amorrison@ecosconsulting.com

www.ptcsnw.com/forms

After logging in, you will see the following screen. From here you can see:

- A list of heat pumps commissioning jobs submitted in your territory
- A list of duct seal jobs submitted in your territory.
- You will also be able to see all jobs where the utility was entered as "unknown".

The screenshot displays the website interface for Performance Tested Comfort Systems Northwest. At the top, a dark blue header contains the company name in white. Below the header is a navigation bar with three tabs: 'Home' (highlighted in green), 'Heat Pump Forms', and 'Duct Sealing Forms'. The main content area is white and features two sections. The first section is titled 'Duct Seal Forms' and includes links for 'Detail View' and 'List View'. The second section is titled 'Heat Pump Forms' and also includes links for 'Detail View' and 'List View'.

New Changes to the Registry

- No longer have multiple status variation for each job.
 - All jobs have one of 3 eligibility indicators:
 - **Accepted:** The forms have been received & reviewed, and deemed as meeting PTCS specifications.
 - **Pending:** The forms have been received and reviewed, but the job may not meet specifications.
 - **Rejected:** The forms have been received and reviewed, and the job does not meet PTCS specifications.

Measure ID number is also link to Detailed View

Heat Pump Forms [to Excel](#) [New form](#)

HPForm	Inspector	Technician ID	Customer Name	Address	City	Zip	Company	Utility	Payment Eligibility	DSForm
6459	amorrison	2059					Dave's Heating and Cooling Service Inc		Accepted	
6458	amorrison	2791					Air Flo Heating		Accepted	
6456	amorrison	2354					Area Heating & Cooling		Pending	
6455	amorrison	1919					Area Heating & Cooling		Pending	
6454	amorrison	1817					Andy's Heating & AC		Rejected	
6453	amorrison	1817					Andy's Heating & AC		Rejected	
6452	amorrison	1141					Border Sheet Metal		Pending	
6451	amorrison	1141					Border Sheet Metal		Pending	
6450	amorrison	1141					Border Sheet Metal		Pending	
6449	amorrison	1141					Border Sheet Metal		Pending	
6448	amorrison	1141					Border Sheet Metal		Pending	
6447	amorrison	1932					Four Seasons Heating & Air Conditioning		Accepted	
6446	amorrison	1932					Four Seasons Heating & Air Conditioning		Accepted	
6445	amorrison	1932	Comille Indian	7011 BITTERFOOT

Link to pdf. form

Form Data

HPFormID	6454
Attached HPFormID	
Inspector	amorrison
Technician [1]	Sims, Andy
Company [2]	Andy's Heating & AC
ElecUtility [3]	Unknown
CustomerName [4]	[REDACTED]
SiteStretAddr [5]	[REDACTED]
SiteCity [6]	[REDACTED]
SiteState [7]	[REDACTED]
SiteZip [8]	[REDACTED]
SiteCounty [9]	[REDACTED]
SitePhone [10]	[REDACTED]
MailStretAddr	
MailCity	
MailState	
MailZip	
HPCommisionDte [11]	1/15/2009
DuctsInside [12]	<input type="checkbox"/>
DuctsCertified [13]	Yes
FundingProgram [14]	BPA
FundingProgramOther [15]	
TaxCredit [16]	<input type="checkbox"/>
TypeReplaced [17]	Non Elec Space
HeatedArea [18]	
HouseType [19]	
AHRINumber	882735
OutdoorUnitMake [20]	25HNA636
OutdoorUnitModel [21]	Carrier
OutdoorUnitCapacity [22]	3
CompressorStage [23]	1

Uploaded Forms

Date	User	#
5/26/2009 4:06:59 PM	mneil	New Delete

QA Inspections

Date	Inspector	Event	Corrected	#
New No data to display				

Status History

StatusID	UserID	Date	#
Measure Failed	mneil	5/26/2009	Edit New Delete

Notes

Type	User	Date	#
Comment	mneil	5/26/2009	Edit New Delete
airflow: states 320/ton controls: blank			

Notes explaining why a job is pending or rejected.

Done

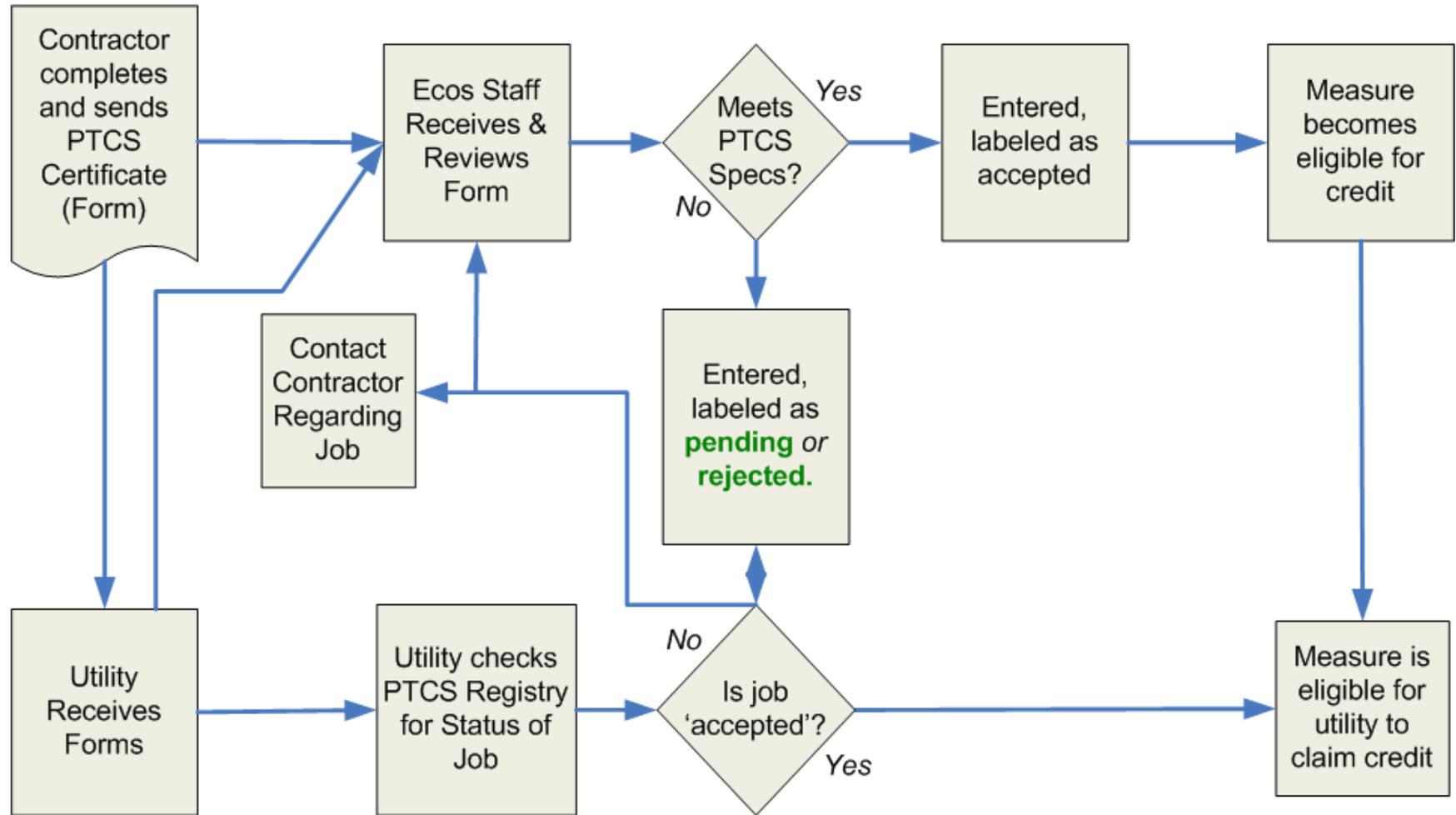
Example

www.ptcsnw.com/forms

30, 60, & 90 Day Notifications

- Job aging reports will be sent to utilities for measures that are 30, 60, and 90 days as 'pending'.
 - You will receive an email monthly with:
 - **30 days:** These jobs have been received and have been labeled as 'pending' for at least 30 days.
 - **60 days:** The jobs have been received have been labeled as 'pending' for at least 60 days.
 - **90 days: Rejected:** The jobs have been labeled as 'pending' for at least 90 days and have now been converted to 'rejected'.
 - We will need an email address to send reports to

PTCS Process Flow – June 3, 2009

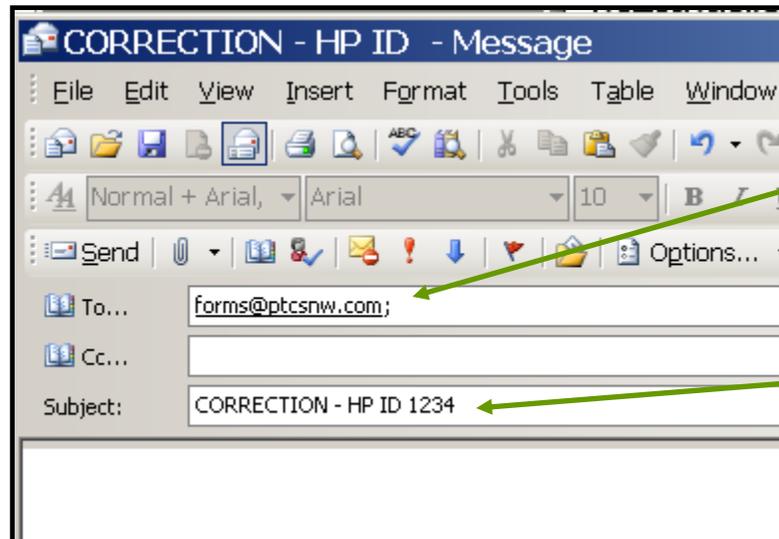


Submitting Corrections

Once the contractor has submitted a new set of forms, informed you of a correction, or otherwise indicated that the reason for which the job was 'pending' or 'rejected' has been corrected, please notify Ecos so the database can be updated.

This can be done by sending the information to Ecos *along with the measure ID & an indication that it is a correction.*

Email example:



forms@ptcsnw.com

PTCS measure ID number

Questions



Review

- Changes to the PTCS Registry
- Who is responsible for submitting PTCS forms
- How to determine if a job is PTCS Certified
- How to determine why a job is Pending or has Failed
- Who is responsible for notifying the contractor that more information is needed or why a job failed
- The on-line PTCS Heat Pump Sizing and Balance Point Calculator

The Future

PTCS
Performance Tested
Comfort Systems

Home Forms Database Posts Contact

Welcome to the web site for Performance Tested Comfort Systems

Links

Program Overview
Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia Curae; Vivamus posuere porttitor turpis. Sed lectus augue, gravida sit amet, rhoncus at, vulpate eu, neque.

Vivamus sed ligula sed mauris tincidunt adipiscing. In nulla risus, hendrerit quis, suscipit a, molestie id, orci. Duis iaculis. Mauris sem ipsum, lacinia at, condimentum vel, varius non, elit. Duis purus mi, tincidunt in, placerat vitae, egestas in, orci. Pellentesque lacus nibh, porta eu, blandit porta, condimentum eu, lectus.

Donec est sem, viverra non, euismod eget, euismod eget, mauris. Curabitur in leo in nulla eleifend luctus. In vel lorem at justo dignissim egestas. Donec sagittis. Quisque arcu. Maecenas tincidunt. Cras porttitor accumsan diam.

For Utilities For Contractors For Homeowners

Upcoming Events

- Alquam erat volutpat. Phasellus pretium. Aliquam erat volutpat. Phasellus eget augue.
- Aenean ornare. Suspendisse venenatis, tellus varius volutpat gravida, risus ipsum imperdiet ante, nec iaculis tortor tellus egestas eros.
- Morbi quis sem eu enim iaculis congue. Aliquam quis quam. Nam nec leo. Nunc elit.

Calendar & Events

- More user friendly
- More intuitive
- Better visual appeal