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# PTCS Online Registry: How to Enter & Search for Jobs

# What is the Registry?

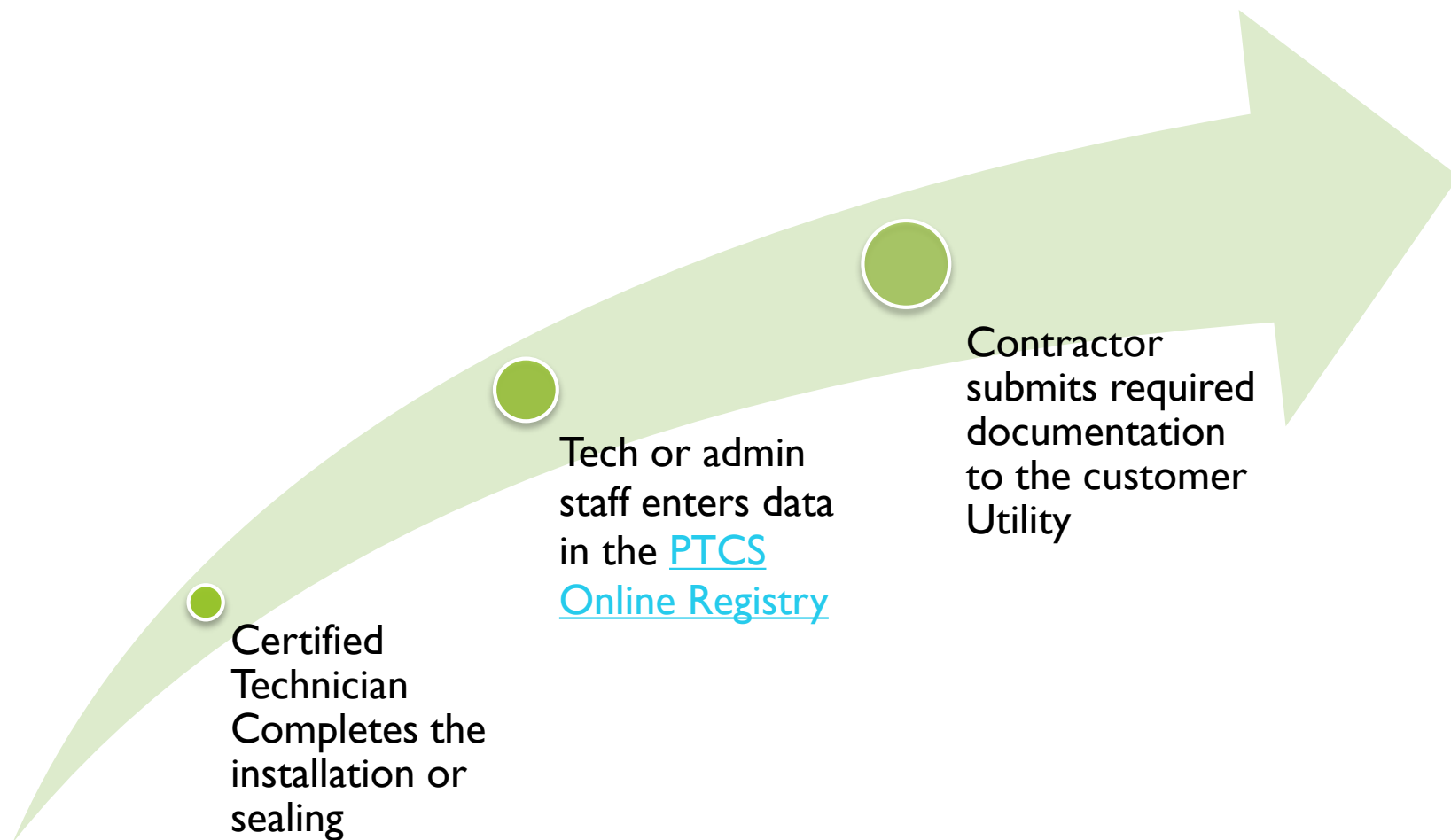
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<https://ptcs.bpa.gov/>

- ▶ It is a the primary online tracking tool for the PTCS and Prescriptive Duct Sealing Programs.
  - ▶ Technicians enter all completed work here
  - ▶ Utilities review completed work here
  - ▶ Tracks status of Certified Technicians
  - ▶ Tracks quality assurance inspections

# Program Process

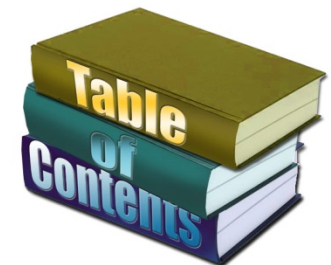
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# Contents

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- ▶ Before you start!
- ▶ Enter a job
- ▶ Enter a job for another user
- ▶ Troubleshoot
- ▶ Search for a completed job
- ▶ Find the Registry Installation Report
- ▶ Documentation requirements
- ▶ Notify utility of the completed job



# Before you start!

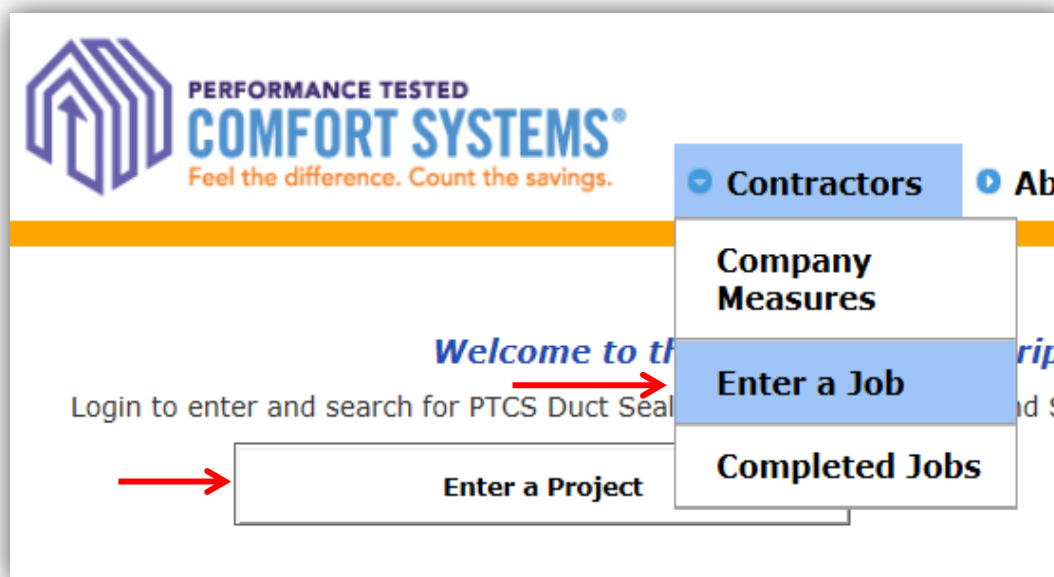
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- ▶ Verify the online account is for the appropriate technician or the account of a company admin.
- ▶ Ensure the account allows you to enter a job
  - ▶ To verify, go to the “My Account” tab and check to see if “Contractor” or CompanyAdmin is listed as a role.
  - ▶ If it is not activated, contact the ResHVAC team by email at [ResHVAC@bpa.gov](mailto:ResHVAC@bpa.gov) or call 1.800.941.3867.

# Enter a Job

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- 1) Log in to installing technician's or company admin account at [ptcs.bpa.gov](https://ptcs.bpa.gov)
- 2) Click “Enter a Project” or hover over “Contractors” and select “Enter a Job”



# Site Address

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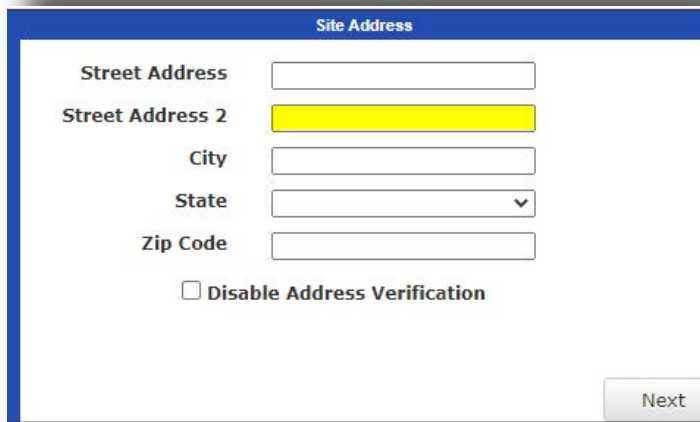
## 3) Enter the install address

- ▶ “Street Address 2” is for lot numbers.

## 4) Click “Next”

- ▶ If the address does not validate, send PTCS form to BPA for entry by email to [ResHVAC@bpa.gov](mailto:ResHVAC@bpa.gov) or fax to 877.848.4074

“Street Address 2” field  
used for lot numbers.

A screenshot of a web form titled "Site Address". The form contains five input fields: "Street Address", "Street Address 2", "City", "State", and "Zip Code". The "Street Address 2" field is highlighted in yellow. Below the fields is a checkbox labeled "Disable Address Verification". A "Next" button is located at the bottom right of the form.

Site Address

Street Address

Street Address 2

City

State

Zip Code

☐ Disable Address Verification

Next

# Site Address

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- 5) Click the link of the correct address based on your input.
- ▶ Address not listed? Click “Previous” to edit or contact the ResHVAC team.

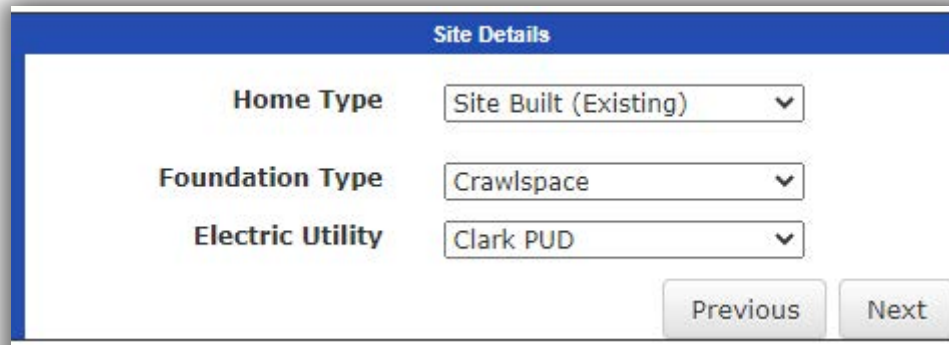




# Site Details

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- ) Enter all site details
  - Home Type
  - Foundation Type
  - Electric Utility Name



The screenshot shows a web form titled "Site Details" with a blue header. It contains three dropdown menus for "Home Type", "Foundation Type", and "Electric Utility". The "Home Type" dropdown is set to "Site Built (Existing)", "Foundation Type" is set to "Crawlspace", and "Electric Utility" is set to "Clark PUD". At the bottom right of the form are two buttons: "Previous" and "Next".

Site Details	
Home Type	Site Built (Existing) ▼
Foundation Type	Crawlspace ▼
Electric Utility	Clark PUD ▼
<div>Previous Next</div>	

# Measure Type

## 8) Select the measure type

- ▶ Measure option not available: Options only appear if your certification is updated on your account.\*\*
- ▶ Previous approved or pending jobs limits any additional entry of this measure.
- ▶ Job in progress: The installing tech saved the entry progress for this measure at this site.

Enter Site Address	<a href="#">Start a PTCS Duct Sealing form</a>
Choose Site	<a href="#">Start a Prescriptive Duct Sealing form</a>
Create New Site / Verify Site Info	<a href="#">Start an Air-Source Heat Pump form</a>
Site Details	* Maximum # of Heat Pump measures in the status of 'Pending' or 'Accepted'
Funding Program	<a href="#">Start a Ground-Source (Water to Air) Heat Pump form</a>
Site Complete	* Maximum # of Heat Pump measures in the status of 'Pending' or 'Accepted'
	<a href="#">Start a Ground-Source (Water to Water) Heat Pump form</a>
	* Maximum # of Heat Pump measures in the status of 'Pending' or 'Accepted'
	<div>Previous</div> <div>Next</div>

*\*\*Contact the PTCS Team if you don't see an option, but you or the technician received training.*

# Measure Entry

## Existing Heating System Type:

Duct Sealing • Indicate heating system at the time of sealing

Heat Pump Install

- New site built: select newly installed heating system
- Existing site built: select heating system being replaced

PTCS Air Source Heat Pump Entry Measure ID:0	
Site Data	
Heated Square Footage	<input type="text"/> *
Existing Heating System Type Being Replaced	<input type="text"/> *
Backup Heating System Type	<input type="text"/> *

# Measure Details: Air Source Heat Pump

Entering AHRI number will auto-populate all this information.

If the AHRI is not recognized, enter all AHRI data manually and contact program staff for review.

Certificate Information	
Completed Date	<input type="text"/>
Site Data	
NEW HEAT PUMP DATA	
AHRI Number	<input type="text"/>
SEER	<input type="text"/>
HSPF	<input type="text"/>
EER	<input type="text"/>
UNIT INFORMATION	
Make	<input type="text"/>
Model	<input type="text"/>
Capacity (Tons)	<input type="text"/>
INDOOR UNIT	
Model	<input type="text"/>
VALIDATE SYSTEM	
Heat Pump Stage(s)	<input type="text" value="v"/>
Balance Point	<input type="text"/> Provide BP documentation to utility.

# Measure Details:

## Air Source Heat Pump, *con't*

Measurement unit type will apply to ESP and TrueFlow Test.

CFM perTon is calculated by the registry: it accepts range of 325 to 500 CFM/ton and rejects jobs outside of that range.

If measure is rejected and airflow is as recommended by the manufacturer, please contact BPA for support.

Temperature Split and Subcooling calculated using calculations from R-410A tables (located online).

Airflow Test	
Did you perform all tests in Test Only/Check Charge mode?	<input type="checkbox"/>
Return Static Pressure	<input type="text"/>
Supply Static Pressure	<input type="text"/>
External Static Pressure	<input type="text"/> ?
Test measured in	<input type="text"/> Use same units for TrueFlow test.

TrueFlow Test	
TrueFlow Test Steps	
NSOP	<input type="text"/>
Plate Size	<input type="text"/>
Plate Location	<input type="text"/>
TFSOP	<input type="text"/>
Plate Pressure	<input type="text"/>
Calculated CFM per Ton	

Refrigerant Charge Check	
Outside Air Temp (F)	<input type="text"/>
Mode Tested	<input type="text" value="Heating"/>
Supply Temp	<input type="text"/>
Return Temp	<input type="text"/>
Calculated Temperature Split	

Controls Setup	
Is the low ambient lockout control (LAL) set to 5 degrees or less?	<input type="checkbox"/>
Auxiliary (strip) heat lockout has been set to:	<input type="checkbox"/>
Indoor Thermostat Make	<input type="text"/>
Indoor Thermostat Model	<input type="text"/>
Is this a Multiple Capacity Compressor System?	<input type="checkbox"/>

# Measure Details: PTCS Duct Sealing

Leakage is calculated using the ring size and fan pressure. Calculated reduction is based on the calculated leakage and home square footage.

Duct blaster fan pressure is not the house pressure.

Certificate Information	
Completed Date:	<input type="text"/>
Percent of ducts in conditioned space:	<input type="text"/>
Duct Sealing Data	
Type of ducts sealed:	<input type="text"/>
Is this information provided for Record Only?	<input type="text"/>
What type of equipment did you use?	<input type="text"/>
# of Supplies	<input type="text"/>
# of Returns	<input type="text"/>
Duct Insulation	<input type="text"/>
HOUSE PRESSURIZATION	
House Pressurization:	<input type="radio"/> 50 Pa <input type="radio"/> Other: <input type="text"/>
<u>Notes on Testing</u>	
Duct Leakage Test: Duct blaster CFM reading with duct pressure at 0Pa with respect to house and Blower Door @ +50Pa.	
Duct Blaster Fan Pressure: This is not the house pressure. Example: Ring 1, 78Pa Fan Pressure, 364 CFM)	
PRE-TEST	
Pre-Test Leakage Requirements	
Pre-Test Ring:	<input type="text"/>
Pre-Test Fan Pressure:	<input type="text"/> (Pa) *
Pre-Test Flow:	<input type="text"/> (CFM <sub>50</sub> ) *
POST-TEST	
Post-Test Leakage Requirements	
Post-Test Ring:	<input type="text"/>
Post-Test Fan Pressure:	<input type="text"/> (Pa) *
Post-Test Flow:	<input type="text"/> (CFM <sub>50</sub> ) *
Duct Blaster Location:	<input type="text"/>
Pressure Tap Location:	<input type="text"/>
Specification Requirements	
The duct sealing at this site meets program requirements including: repairs metal ducts secured with screws, flex duct interior and exterior liners secured with nylon straps or steel band clamps, ducts are supported and off the ground, boots are mechanically fastened to floor/ceiling, plenum, main ducts, takeoffs and boots sealed, and a good faith effort was made to remove existing duct tape and cover with mastic.	
<input type="text"/>	
CAZ Test	
Is there a combustion appliance zone?	<input type="text"/> *
Is a CO detector installed?	<input type="text"/> *

# Measure Details: Prescriptive Duct Sealing

This measure records whether all opportunities were sealed. There are no calculations involved.

Certificate Information	
Completed Date	<input type="text"/>
Type of ducts sealed	<input type="text"/> *
Qualifying Characteristic	<input type="text"/> *
# of Supplies	<input type="text"/> *
# of Returns	<input type="text"/> *
Duct Repair	
Select all issues repaired:	<input type="checkbox"/> No repairs done
	- or -
	<input type="checkbox"/> Large gaps in sheet metal
	<input type="checkbox"/> Rusted portions
	<input type="checkbox"/> Missing sections
Metal Ducts:	<input type="text"/> *
Flex Duct Connections:	<input type="text"/> *
Flex Duct Liners:	<input type="text"/> *
Duct Support and Connections	
Duct Support	<input type="text"/> *
Ground Contact	<input type="text"/> *
Boots are mechanically fastened to the subfloor	<input type="text"/> *
Duct Sealing	
<b><u>All accessible portions of the duct which require sealing are sealed with approved materials.</u></b> This includes pulling insulation off, where opportunities exist. Examples of opportunities: Plenum; Air-handler cabinet to plenum; Plenum-to-take-off connections; Finger/dovetail joints; Branch T's, Y's and L's; Duct-to-duct connections; and Gores on adjustable elbows.	
Are all ducts properly sealed?	<input type="text"/> *
Return was	<input type="text"/> *
Duct Insulation	<input type="text"/> *
CAZ Test	
Is there a combustion appliance zone?	<input type="text"/> * (?)
Is a CO detector installed?	<input type="text"/> *

# Measure Details:

## Ground Source Heat Pump (Water to Air)

Entering AHRI number will auto-populate all this information.

If the AHRI is not recognized, enter AHRI data manually and contact program staff for review.

Certificate Information	
Completed Date	<input type="text"/>
Site Data	
NEW HEAT PUMP DATA	
Loop Type	<input checked="" type="radio"/> Open <input type="radio"/> Closed
AHRI Number	<input type="text"/>
COP	<input type="text"/>
UNIT INFORMATION	
Make	<input type="text"/>
Model	<input type="text"/>
Capacity (Tons)	<input type="text"/>
VALIDATE SYSTEM	
Heat Pump Stage(s)	<input type="text"/> <input type="button" value="v"/>
Balance Point	<input type="text"/> <small>Provide BP documentation to utility.</small>
Airflow Test	
Did you perform all tests in Test Only/Check Charge mode?	<input type="text"/> <input type="button" value="v"/>
Return Static Pressure	<input type="text"/>
Supply Static Pressure	<input type="text"/>
External Static Pressure	<input type="text"/> <input data-bbox="1613 935 1651 963" type="button" value="?"/>
Test measured in	<input type="text"/> <input type="button" value="v"/> <small>Use same units for TrueFlow test.</small>
TrueFlow Test	
<input type="button" value="TrueFlow Test Steps"/>	
NSOP	<input type="text"/>
Plate Size	<input type="text"/> <input type="button" value="v"/>
Plate Location	<input type="text"/> <input type="button" value="v"/>
TFSOP	<input type="text"/>
Plate Pressure	<input type="text"/>
Calculated CFM per Ton	



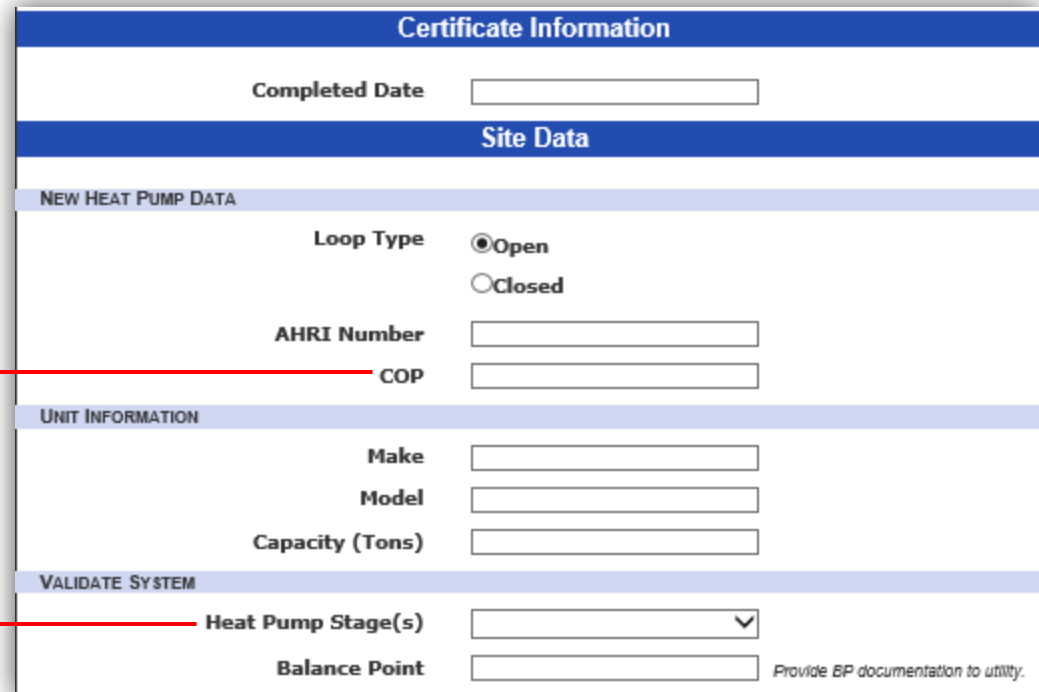
# Measure Details:

## Ground Source Heat Pump (Water to Water)

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Entering AHRI number will auto-populate all this information.

If the AHRI is not recognized, enter AHRI data manually and contact program staff for review.



Certificate Information	
Completed Date	<input type="text"/>
Site Data	
NEW HEAT PUMP DATA	
Loop Type	<input checked="" type="radio"/> Open <input type="radio"/> Closed
AHRI Number	<input type="text"/>
COP	<input type="text"/>
UNIT INFORMATION	
Make	<input type="text"/>
Model	<input type="text"/>
Capacity (Tons)	<input type="text"/>
VALIDATE SYSTEM	
Heat Pump Stage(s)	<input type="text"/> ▼
Balance Point	<input type="text"/> Provide BP documentation to utility.

# Saving Entry Progress

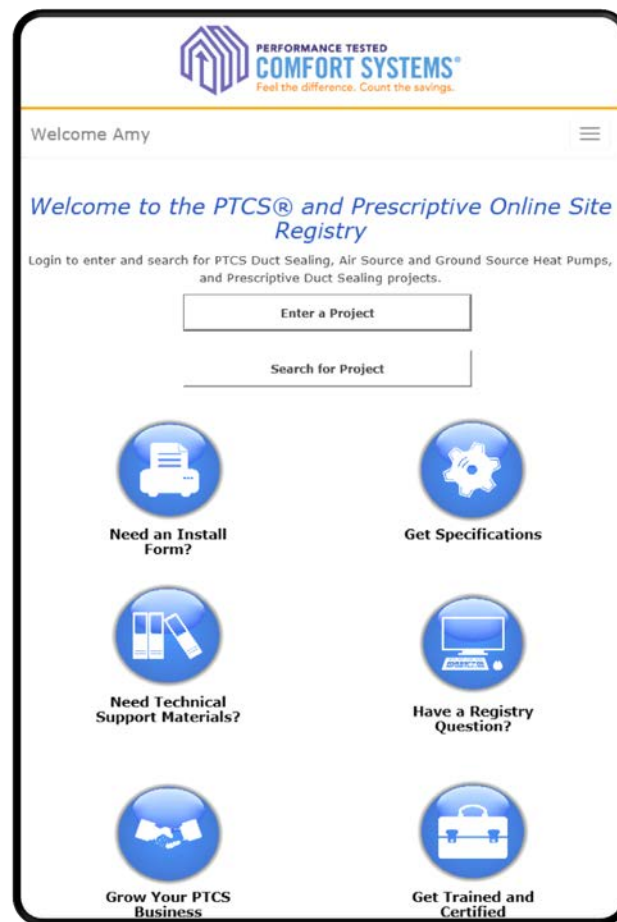
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- ▶ If you aren't able to enter all the data, click “Save Progress” on the bottom of the entry screen to complete later.
- ▶ Accessing/Completing later:
  1. Log on as the installing technician or company admin account.
  2. Search for the measure using the address or measure ID
  3. Click “Continue Job”



# Enter on a Mobile Device

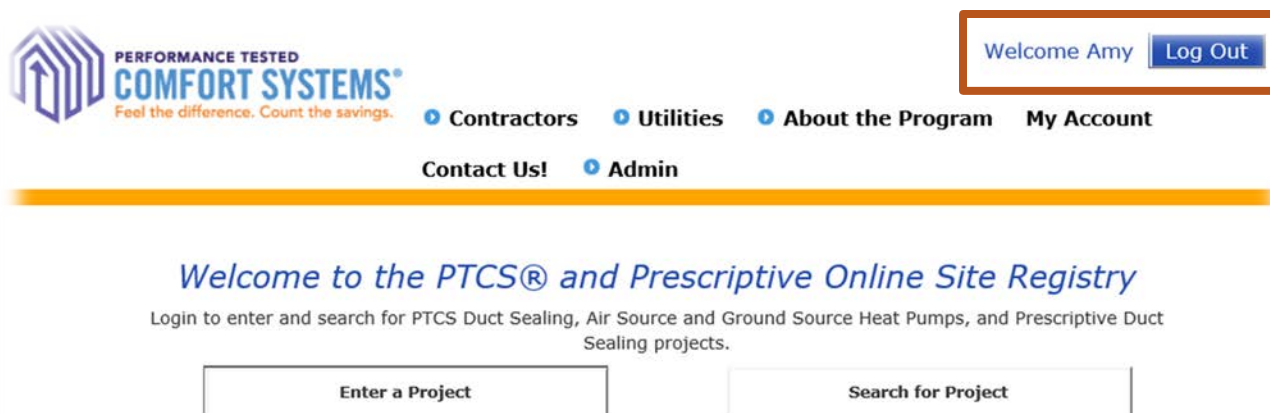
- ▶ Entry can be done using any mobile device with internet access. Offline access is coming soon.
- ▶ If you aren't able to enter data in the field, forms will still be available on the online registry to record the data until you have access to the internet.



# Enter a Job for Another User

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- ▶ If you are entering work for one or multiple other technicians, please create an account for yourself and contact program staff to receive the CompanyAdmin permissions. This will allow you to enter jobs for any certified technicians under your company.



# Troubleshoot

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- ▶ Contact the PTCS team if:
  - ▶ Address isn't validating
  - ▶ Measure set to 'BPA Pending' after submitting
  - ▶ Need to enter in a third system for a single site
  - ▶ Can't find an entered job
  - ▶ Need to edit an address or submitted data
  - ▶ Need immediate review of "Pending" entry (reviewed regularly)
  - ▶ Have general questions or feedback for improvement

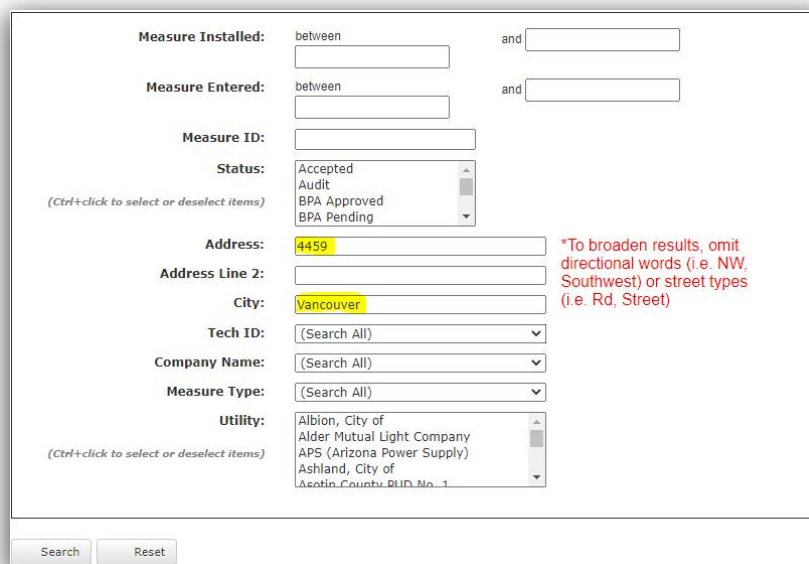
# Search for a Completed Job

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- ▶ Each account has access to jobs depending on the user. For example:
  - ▶ Technicians can only see jobs they are associated with.
  - ▶ Utility can only see jobs entered in their territory.
  - ▶ Company Admin can see all jobs for associated with the contractor.
- ▶ Contact the PTCS team if you would like additional access.

# Search for a Completed Job

1. Sign in to the Online Registry with the appropriate account
2. Click “Search for Project”
3. Entering just the number in the address box, and the city in the city box tends to provide the best results (i.e. only “1234” for the address “1234 Main St”). Being too specific might yield no results.



The screenshot shows a search form with the following fields and options:

- Measure Installed:** between  and
- Measure Entered:** between  and
- Measure ID:**
- Status:**  (Accepted, Audit, BPA Approved, BPA Pending) (Ctrl+click to select or deselect items)
- Address:**  (4459)
- Address Line 2:**
- City:**  (Vancouver)
- Tech ID:**  (Search All)
- Company Name:**  (Search All)
- Measure Type:**  (Search All)
- Utility:**  (Albion, City of, Alder Mutual Light Company, APS (Arizona Power Supply), Ashland, City of, Astoria, City of, BUD No. 1) (Ctrl+click to select or deselect items)

\*To broaden results, omit directional words (i.e. NW, Southwest) or street types (i.e. Rd, Street)

Search Reset

# Find the Registry Installation Report

- ▶ Click on the measure ID in the search results to get a PDF report

Measure ID	Measure Type	Entered
1234 test st 20170614 portland, OR		
<a href="#">Edit Measure</a> <a href="#">View History</a>	<a href="#">1786994</a> PTCS Duct Seal	6/14/

**PTCS Registry Installation Report**  
**PTCS Duct Seal #1786994**

Site Address  
1234 test st 20170614  
portland, OR 99999

**Site Info**

House Type	EXIST
Foundation Type	Crawlspace
Heated Area	2000
Existing Heating System Type Being Replaced	Electric Forced Air w/out AC
Backup Heat System Type	None

**Electricity** **Utility**

Electricity	Rocky Mountain Power
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**Technician**

Technician Name: [Burke, Amy](#)  
PTCS ID: 10458

**Company**

Company: [Bonneville Power Administration](#)  
Portland, OR

**Measure**

Service Date: 6/1/2017  
Entered Date: 4/24/2019  
CAZ Present: False  
CO Monitor Present: False  
Duct Seal Type: Seal Existing Ducts



# Documentation Requirements

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- ▶ It is strongly encouraged to contact the customer's utility company for documentation requirements as they vary from utility to utility. Some potential requirements below:
- ▶ Registry Installation Report (*found online*)
- ▶ Equipment/Contractor Invoice
- ▶ Documentation of Sizing (*only Air Source & Ground Source Heat Pumps*)
- ▶ Loop Design (*only Ground Source Heat Pumps*)
- ▶ Handwritten form (*only Ground Source Heat Pumps*)  
*Please check with the customer utility for additional documentation requirements.*



# Heat Pump Documentation: Sizing

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- ▶ If sizing documentation is required by utility, this tool can be used for Heat Pump Sizing and Balance Point (submitting either):
  - ▶ “Both the ‘Heating Load/Heat Loss calculations’ and ‘Balance Point Worksheet’”

**OR**

- ▶ “[PTCS Heat Pump and Central Air Conditioner Sizing Calculator](#)”
- ▶ (found on <https://www.bpa.gov/-/media/Aep/energy-efficiency/document-library/Heat-Pump-Sizing-Calculator.xlsb>)

# Notify Utility of the completed job

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- ▶ Technician or company is required to notify the utility of the completed job.
- ▶ Contact customer's utility for information on required paperwork.
- ▶ Utilities have access to the online registry and are able to review completed job details.



# Questions? Comments?

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Contact the PTCS Team:

*Phone:* (800) 941-3867

*Email:* [ResHVAC@bpa.gov](mailto:ResHVAC@bpa.gov)

Thank  
you

