

PTCS Thermostat Support Sheets

Click on a link below

Carrier Côt™

(Models: TP-WEM01)

Carrier Edge

(Models: TP-PAC, TP-PHP, TP-NAC, TP-NHP)

Carrier Infinity Touch

(Models: SYSTXCCITW01-A, SYSTXCCINTN01-A, SYSTXCCITC01-A)

Honeywell Prestige

(Models: Prestige IAQ, Wi-Fi 9000)

Honeywell VisionPRO8000

(Models: NEW VisionPRO 8000, VisionPRO 8000 Wi-Fi, VisionPRO 8000 w/RedLINK)

Honeywell VisionPRO IAQ

(Models: YTH9421C1010, YTH9421C1002, TH9421C1004)

Lennox iComfort Wi-Fi

Nest I, II, III

(Models: T100577, T200577, T3007ES)

Trane/American Standard 824

(Models: XL824, TCONT824)

Trane ComfortLink II

(Models: XL950, TZONE950AC52ZA)

PTCS Heat Pump Thermostat Support Sheet

Manufacturer: Carrier C^or™

Thermostat Models: TP-WEM01

Caution: On the first screen when entering installer set-up mode (service menu), always press "Cancel" rather than "Save" to avoid changing original installer settings.

Is a Password Required? **NO**

-On the home screen, the wifi connection is displayed in the top right (standby screen) or top center (home screen) of the display. Cell phone bars indicate an active connection. An internet connection is necessary for this thermostat to operate properly.



1. How to enter installer set-up (Service Menu)

- a. From the Home screen, press "Menu" in the lower right corner
- b. An "Options" screen appears with 8 icons.
- c. Press and HOLD the "Service" icon located in the lower right corner for 10 seconds until it turns green

2. Determine system characteristics through T-Stat

- a. The C^or™ is not a communicating thermostat. Detailed system information is not automatically displayed through this thermostat.
- b. From the Service menu (accessed by pressing and holding the service icon) press "INSTALLATION SETTINGS"
- c. From the Installation Settings menu, select "EQUIPMENT SETUP"
- d. Select "HEAT PUMP". The number of heat pump stages will be displayed.

3. Check Compressor Lockout settings - *Carrier refers to this feature as "Heat Source Lockouts- HP Lockout"*

- a. **AN INTERNET CONNECTION IS NECESSARY FOR THIS FEATURE TO OPERATE PROPERLY**
- b. From the Service menu (accessed by pressing and holding the service icon) press "INSTALLATION SETTINGS"
- c. From the Installation Settings menu, select "EQUIPMENT SETUP"
- d. Select "HEAT PUMP"
- e. From the Heat pump screen, select HEAT PUMP LOCKOUT (compressor lockout). Lockout temperature will be displayed. Default setting is off. This setting does not work if the thermostat is not connected to the internet. Verify it is set to "below" 5 degrees, or "OFF". This setting is adjustable from 5-55 degrees.
- f. Click "Cancel" to return to the previous screen without changing any settings.
- g. Continue to press the "BACK" button to return to a screen with the option to select "DONE". Pressing the "DONE" option in the lower right corner returns to the HOME screen.
- h. **Do not hit the save button at any time.**

PTCS Heat Pump Thermostat Support Sheet

Manufacturer: Carrier C^or™

Thermostat Models: TP-WEM01

4. Check Strip Heat settings - *Carrier refers to this feature as "Heat Source Lockouts - AUX Heat Lockout"*

- a. **AN INTERNET CONNECTION IS NECESSARY FOR THIS FEATURE TO OPERATE PROPERLY**
- b. From the Service menu (accessed by pressing and holding the service icon) press "INSTALLATION SETTINGS"
- c. From the Installation Settings screen, select "OPERATING THRESHOLDS"
- d. From the operating thresholds screen, press "AUXILIARY HEAT CONFIGURATION"
- e. From the Auxiliary Heat Configuration menu, press "AUXILIARY HEAT LOCKOUT TEMP"
- f. Electric Heat/Furnace Lockout (strip heat or backup heat lockout) is displayed in the center of the screen. Verify it is set to 35 degrees or less. This setting is adjustable from 5-80 degrees. The default setting is 70 degrees.
- g. Click "Cancel" to return to the previous screen without changing any settings
- h. Continue to press the "BACK" button to return to a screen with the option to select "DONE". Pressing the "DONE" option in the lower right corner returns to the HOME screen.
- i. **Do not hit the save button at any time.**

5. Access Test Mode for testing system at full capacity

- a. **There is no test only option for this thermostat.** To test the system, make a big call (at least 10 degrees) for HEATING or COOLING depending on the type of test you wish to perform.
- b. Wait and listen to ensure that the system sounds as if it has ramped up to full fan speed. This may take a few minutes depending on the indoor unit characteristics.
- c. Wait at least 10 minutes before taking static pressure readings and inserting flow plate for Trueflow plate test
- d. Wait at least 20 to 25 minutes before doing temperature split readings for refrigerant test. The longer the system is allowed to run, the more likely it will reach a steady state
- e. Note- On systems with variable speed fans installed, there is a "Perfect Heat Pump System" or "Comfort Heat Pump" feature that, when selected, runs the air handler at a lower speed if the outdoor temperature is below 40 degrees. This setting would equate to approximately 325 CFM per ton under ideal conditions. The system default for this feature is disabled; however, if Trueflow plate testing results are below spec, and the outdoor temperature is below 40 degrees, it could be because of this feature.

6. Exit Service Menu

- a. To exit the Service menu, press "DONE" in the bottom right hand corner of the screen

7. Exit Set-Up Menu

- a. Depending on which Setup menu screen you are on, press "BACK" until you reach the main service menu screen
- b. Press "Exit" and you will return to the home screen

Caution: On the first screen when entering installer set-up mode (service menu), always press "Cancel" rather than "Save" to avoid changing original installer settings.

Resources: Carrier Support: 1-800-227-7437

Sources: Advanced Installation and Configuration Instructions Manual:
<http://dms.hvacpartners.com/docs/1009/public/09/tp-wem-tempsti.pdf>

PTCS Heat Pump Thermostat Support Sheet

Manufacturer: Carrier Edge

Thermostat Models: TP-PAC, TP-PHP, TP-NAC, TP-NHP

The Carrier Edge can be configured as a communicating thermostat

Caution: On the first screen when entering installer set-up (service menu), always press "Cancel" rather than "Save" to avoid changing original installer settings.

Is a Password Required? **NO**

1. How to enter installer set-up (Configuration Mode)

- a. From the Home screen, press and hold the "Fan" button for approximately 10 seconds. After ten seconds the system will enter "Configuration mode".
DO NOT HOLD FOR 15 SECONDS, that will enter a different mode.
- b. Scroll and select the option number for characteristics you wish to check
- c. The thermostat will automatically exit Configuration mode if nothing is pressed for 3 minutes



2. Determine system characteristics through T-Stat

- a. Follow step 1-a to enter Configuration mode
- b. Once in Configuration mode, select "Option 1" to display equipment type.
There is no option to display serial numbers
- c. Press "Back" or "Done" to exit the system information screen

3. Check Compressor Lockout settings

- a. **There is no compressor lockout option with this thermostat**

4. Check Strip Heat settings - *Carrier refers to this feature as "Auxiliary Heat Lockout Temperature"*

- a. Follow step 1-a to enter Configuration mode
- b. Select Option 8 to view lockout temperature
- c. The temperature listed when Option 8 is selected is the temperature setting for the auxilliary heat lockout.
- d. **Do not hit the save button at any time.**

5. Access Test Mode for testing system at full capacity

- a. **There is no test only option for this thermostat.** To test the system, make a big call (at least 10 degrees) for HEATING or COOLING depending on the type of test you wish to perform.
- b. Wait and listen to ensure that the system sounds as if it has ramped up to full fan speed. This may take a few minutes depending on the indoor unit characteristics.
- c. Wait at least 10 minutes before taking static pressure readings and inserting flow plate for Trueflow plate test
- d. Wait at least 20 to 25 minutes before doing temperature split readings for refrigerant test. The longer the system is allowed to run, the more likely it will reach a steady state.

PTCS Heat Pump Thermostat Support Sheet

Manufacturer: Carrier Edge

Thermostat Models: TP-PAC, TP-PHP, TP-NAC, TP-NHP

The Carrier Edge can be configured as a communicating thermostat

7. Exit Set-Up Menu (Configuration Mode)

- a. To exit Configuration mode at any time, press either "Fan" or "Done" on the display
- b. If left in Configuration mode, the system will time out and return to the home screen after 3 minutes of inactivity

Caution: On the first screen when entering installer set-up (service menu), always press "Cancel" rather than "Save" to avoid changing original installer settings.

Resources: Carrier Support: 1-800-227-7437)

Sources: <http://dms.hvacpartners.com/docs/1009/public/0a/tp-pac-07si.pdf>

PTCS Heat Pump Thermostat Support Sheet

Manufacturer: Carrier Infinity Touch Control

Thermostat Models: SYSTXCCITW01-A, SYSTXCCINTN01-A, SYSTXCCITC01-A

The Carrier Infinity Touch is a communicating thermostat compatible with Carrier units only

Caution: On the first screen when entering installer set-up mode (service menu), always press "Cancel" rather than "Save" to avoid changing original installer settings.

Is a Password Required? **NO**

1. How to enter installer set-up (Service Menu)

- a. From the Home screen, press "Menu" in the lower right corner
- b. An "Options" screen appears with 8 icons. Press the down arrow in the lower right corner to scroll to the second page of options
- c. Press and HOLD the "Service" icon (a picture of a baseball cap) located in the upper left corner for 10 seconds until it turns green



2. Determine system characteristics through T-Stat

- a. From the Service menu (accessed by pressing and holding the service baseball cap icon) press "Service Information"
- b. Select "Service Information" from the "Options" screen
- c. Scroll down to "Model/Serial numbers" and press "Enter". The system information will be displayed.
- d. Press "Back" or "Done" to exit the system information screen

3. Check Compressor Lockout settings - *Carrier refers to this feature as "Heat Source Lockouts- HP Lockout"*

- a. From the Service menu (accessed by pressing and holding the service baseball cap icon) press "SETUP"
- b. From the Setup menu, select "AC/HEAT PUMP"
- c. Heat Pump Lockout (compressor lockout) is displayed on the left. Verify it is set to "below" 5 degrees, or "None". This setting is adjustable from 5-55 degrees.
- d. Click "Cancel" to return to the previous screen without changing any settings
- e. **Do not hit the save button at any time.**

4. Check Strip Heat settings - *Carrier refers to this feature as "Heat Source Lockouts - Electric Heat Lockout"*

- a. From the Service menu (accessed by pressing and holding the service baseball cap icon) press "SETUP"
- b. From the Setup screen, select "AC/HEAT PUMP"
- c. Electric Heat/ Furnace Lockout (strip heat or backup heat lockout) is displayed on the right. Verify it is set to "above" 35 degrees or less This setting is adjustable from 5-55 degrees
- d. Click "cancel" to return to the previous screen without changing any settings
- e. **Do not hit the save button at any time.**

PTCS Heat Pump Thermostat Support Sheet

Manufacturer: Carrier Infinity Touch Control

Thermostat Models: SYSTXCCITW01-A, SYSTXCCINTN01-A, SYSTXCCITC01-A

The Carrier Infinity Touch is a communicating thermostat compatible with Carrier units only

5. Access Test Mode for testing system at full capacity

- a. **There is no test only option for this thermostat.** To test the system, make a big call (at least 10 degrees) for HEATING or COOLING depending on the type of test you wish to perform.
- b. Wait and listen to ensure that the system sounds as if it has ramped up to full fan speed. This may take a few minutes depending on the indoor unit characteristics.
- c. Wait at least 10 minutes before taking static pressure readings and inserting flow plate for Trueflow plate test
- d. Wait at least 20 to 25 minutes before doing temperature split readings for refrigerant test. The longer the system is allowed to run, the more likely it will reach a steady state

6. Exit Service Menu

- a. To exit the Service menu, press "DONE" in the bottom right hand corner of the screen

7. Exit Set-Up Menu

- a. Depending on which Setup menu screen you are on, press "BACK" until you reach the main service menu screen
- b. Press "Exit" and you will return to the home screen

Caution: On the first screen when entering installer set-up mode (service menu), always press "Cancel" rather than "Save" to avoid changing original installer settings.

Resources: Carrier Support: 1-800-227-7437)

Sources: Installation Manual: <http://dms.hvacpartners.com/docs/1009/public/09/systxccitw-06si.pdf>
http://www.training.carrier.com/wcs/dynamiclit_result/1,2759,CLI1_DIV41_ETI4922_NBD_PRD1949,00.html

PTCS Heat Pump Thermostat Support Sheet

Manufacturer: Honeywell

Thermostat Models: Prestige IAQ, Wi-Fi 9000

**Caution: entering installer set-up mode may result in altering settings.
Select "NO" when prompted "DO YOU WISH TO SAVE YOUR CHANGES"**

Is a Password Required? YES

Password is 4-digit date code

Password can be found in two ways:

- a.
 1. Press "Menu"
 2. Scroll Down and Select "Dealer Information"
 3. If dealer information is configured, "Date Code" will be displayed
- b.
 1. Remove Thermostat from wall
 2. Password (date code) is 4 digits listed to the right of the model number

It is recommended that the thermostat not be removed from the wall if possible. If the installer did not configure dealer information during the initial installation, a password can only be obtained by removing the unit from the wall.



1. How to enter installer set-up (Models: YTHX9421R5127WW, YTHX9421R5101WW, YTHX9421R5085WW, TH9320WF5003, TH9320WF6007)

- a. Press Menu in the top right corner of the home screen
- b. Scroll to bottom and select "INSTALLER OPTIONS"
- c. Enter 4 digit password (instructions above) and press "DONE"
- d. Select "VIEW/EDIT CURRENT SETUP". **DO NOT ENTER THE CREATE SETUP MENU BY SELECTING "CREATE SETUP" AT ANY TIME.**

2. Determine system characteristics through T-Stat

- a. In the installer options menu accessed by following the steps listed above, select "VIEW/EDIT CURRENT SETUP". The accessed menu displays a list of options to select that show the different system characteristics enabled or programmed into/by the thermostat.

3. Check Compressor Lockout settings

- a. In the installer options menu, select "VIEW/EDIT CURRENT SETUP".
- b. Scroll to and select "HEAT/COOL CONTROL OPTIONS". A drop down menu will be displayed.
- c. From the drop down menu, scroll and select "COMPRESSOR LOCKOUT/BALANCE POINT". A screen for mode 3120, outdoor temperature lockouts will be displayed. This screen shows the activated lockout temperatures for both the compressor lockout and auxiliary heat lockout. The Compressor Lockout setting is displayed on the left and must be set to "Off" or 5 degrees to meet spec.
- d. NOTE- If no outdoor sensor is installed or enabled, lockouts will be displayed as OFF and are not adjustable.

4. Check Strip Heat settings

- a. In the installer options menu, select "VIEW/EDIT CURRENT SETUP".
- b. Scroll to and select "HEAT/COOL CONTROL OPTIONS". A drop down menu will be displayed.
- c. From the drop down menu, scroll and select "BACKUP HEAT LOCKOUT". A screen for mode 3120, outdoor temperature lockouts will be displayed. This screen shows the activated lockout temperatures for both the compressor lockout and auxiliary heat lockout. The Auxiliary Heat Lockout setting is displayed on the right and must be set to 35 degrees or lower to meet spec.
- d. NOTE- If no outdoor sensor is installed or enabled, lockouts will be displayed as OFF and are not adjustable.

PTCS Heat Pump Thermostat Support Sheet

Manufacturer: Honeywell

Thermostat Models: Prestige IAQ, Wi-Fi 9000

5. Access Test Mode for testing system at full capacity

- a. Press Menu
- b. Scroll to bottom and Select "INSTALLER OPTIONS"
- c. Enter 4-digit password and press "DONE"
- d. Scroll and select "INSTALLER TEST" to enter equipment test mode.
- e. Scroll and select "EQUIPMENT TEST". To select the desired system test, press "NEXT TEST" in the bottom right until the mode you wish to test is displayed.
- f. The first test screen is COOLING MODE; if you do not wish to test in cooling, press "NEXT TEST" to proceed to the next testing option.
- g. The second test screen option is the FAN TESTING MODE. This testing option should not be used for PTCS heat pump QA purposes. To access the HEATING TEST MODE, press "NEXT TEST" to proceed to the Heating test mode screen.
 - A. Heating mode: Once in the "EQUIPMENT TEST: HEAT STAGES" screen accessed by following the steps above, select the compressor button on the left for the desired stage you wish to test in. If there is more than 1 compressor stage, more than 1 button will be displayed. Press the button for the highest stage to test heating in the highest stage. A timer will begin to count as the test proceeds.
 - B. Cooling mode: The first test screen displayed when entering test mode is the "EQUIPMENT TEST: COOL STAGES" option. To test cooling, select the highest compressor stage button displayed on the screen. A timer will begin to count as test proceeds.
 - C. Wait at least 10 minutes before taking static pressure readings and inserting flow plate for TrueFlow plate test. Listen to ensure fan has staged up completely.
 - D. Wait at least 20 to 25 minutes before doing temperature split readings for refrigerant test. The longer the system is allowed to run, the more likely it will reach a steady state. **System test automatically times out after 30 minutes of inactivity.**

6. Exit Test Mode

- a. System test automatically times out after 30 minutes of inactivity. Test mode runs for 30 minutes by default.
- b. Select the "EXIT TEST" button at the bottom of the testing screen to stop testing and exit test mode. Continue to select the "previous screen" button until the display returns to the main menu screen.
- c. Select the "HOME" button at the top left of the screen to return to the home screen and ensure the system is set at the original comfort settings.

7. Exit Set-Up Mode

- a. From the "VIEW/EDIT CURRENT SETUP" screen, select "DONE" to return to the installer options screen.
- b. From the installer options screen, select "PREVIOUS MENU" on the left to return to the options menu.
- c. From the options menu, select the "HOME" button on the top left of the screen to return to the home screen.

Caution: entering installer set-up mode may result in altering settings.

When exiting Installer options, Select "NO" when prompted "DO YOU WISH TO SAVE YOUR CHANGES"

Resources: Honeywell Technical Support: 1-800-468-1502

Source: http://www.forwardthinking.honeywell.com/products/thermostats/thermostat_products.html

PTCS Heat Pump Thermostat Support Sheet

Manufacturer: Honeywell VisionPRO 8000

Thermostat Models: NEW VisionPRO 8000, VisionPRO 8000 Wi-Fi, VisionPRO 8000 w/RedLINK

**Caution, entering installer set-up mode may result in altering settings.
Select "DO NOT SAVE CHANGES" when exiting installer set-up**

Is a Password Required? YES

Password is 4-digit date code

Password can be found in two ways:

- a.
 1. Press "Menu"
 2. Select "Dealer Information"
 3. Scroll Down to "Date Code"
- b.
 1. Remove Thermostat from wall
 2. Password (date code) is 4 digits listed to the right of the model number

*It is recommended that the thermostat not be removed from the wall, if possible.
If the installer did not configure dealer information during the initial installation,
a password can only be obtained by removing the unit from the wall.*



1. How to enter installer set-up (Models: TH8320WF, TH8321WF, TH8110R, TH8320R, TH8321R, TH8110U)

- a. Press Menu
- b. Scroll to bottom and Select "Installer Options"
- c. Enter 4 digit password (instructions above) and press "DONE"
- d. Scroll to "Installer Setup" and press "select"

2. Determine system characteristics through T-Stat

- a. Scroll through "Installer Setup" options
- b. Code 200 is for Conventional Forced Air
- c. Code 201 is for Air-to-Air Heat Pump
- d. Code 202 (1-3) and Code 207 (1-4) are for Heat Stages/Backup heat stages, and compressor stages
- e. Code 106 determines if an outdoor sensor is configured

3. Check Compressor Lockout settings

- a. Once in installer set-up mode, scroll through settings to option 312 "Outdoor Lockout HEAT PUMP"
- b. Must be set to "Off", or 5 degrees or less to meet spec
- c. Verify Wi-Fi connection for VisionPRO 8000 WIFI (model TH8320WF and TH8321WF) with no hard wired outdoor sensor installed. Press "MENU" and select "WI-FI SETUP" to determine if Wi-Fi is activated. If Wi-Fi is being used for outdoor temperature lockout control, outdoor sensor option must be set as "YES".

4. Check Strip Heat settings

- a. After verifying compressor lockout in step 3, scroll to option 312 "Outdoor Lockout BACKUP HEAT"
- b. Verify temperature is 35 degrees or set to "OFF"
- c. Verify Wi-Fi connection for VisionPRO 8000 WIFI (model TH8320WF and TH8321WF) with no hard wired outdoor sensor installed. Press "MENU" and select "WI-FI SETUP" to determine if Wi-Fi is activated. If Wi-Fi is being used for outdoor temperature lockout control, outdoor sensor option must be set as "YES".

PTCS Heat Pump Thermostat Support Sheet

Manufacturer: Honeywell VisionPRO 8000

Thermostat Models: NEW VisionPRO 8000, VisionPRO 8000 Wi-Fi, VisionPRO 8000 w/RedLINK

5. Access Test Mode for testing system at full capacity

- a. Press Menu
- b. Scroll to bottom and Select "Installer Options"
- c. Enter 4-digit password and press "DONE"
- d. Scroll and select "Installer Setup"
- e. Scroll and select "Installer Test" below "Installer Setup" to enter Test Mode
- f. Scroll and select desired system to test:
 - A. Heating mode: scroll down to "Heat Stages" and press "Select". Cycle to the highest heat stage available by pressing the up arrow button on the top right to test in the highest compressor heating setting. Timer will begin to count as test proceeds. **If unit is a single stage system, when testing in "HEAT STAGES" do not scroll to heat stage 2. This will cause strip heat to come on.**
 - B. Cooling mode: scroll down to "Cool Stages" and press "Select". Cycle to highest cooling stage available by pressing the up arrow button on the top right to test in the highest compressor cooling setting. Timer will begin to count as test proceeds.
 - C. Wait at least 10 minutes before taking static pressure readings and inserting flow plate for TrueFlow plate test. Listen to ensure fan has staged up completely.
 - D. Wait at least 20 to 25 minutes before doing temperature split readings for refrigerant test. The longer the system is allowed to run, the more likely it will reach a steady state. **System test automatically times out after 30 minutes of inactivity.**

6. Exit Test Mode

- a. System test automatically times out after 30 minutes of inactivity. Test mode runs for 30 minutes by default.
- b. Press "Home" to exit test mode, or "back" to select a different stage or mode to test

7. Exit Set-Up Mode

- a. Select "DONE"
- b. Next screen prompt says "Do you want to exit installer setup?"; select "YES"
- c. Next screen prompt says "Do you want to save changes"; select "NO"
- d. If left alone, system set-up automatically times out after 30 minutes of inactivity and returns to original settings

**Caution, entering installer set-up mode may result in altering settings.
Select "DO NOT SAVE CHANGES" when exiting installer set-up**

Resources: Honeywell Technical Support: 1-800-468-1502

Source: http://www.forwardthinking.honeywell.com/products/thermostats/thermostat_products.html

PTCS Heat Pump Thermostat Support Sheet

Manufacturer: Honeywell VisionPRO IAQ

Thermostat Models: YTH9421C1010, YTH9421C1002, TH9421C1004

Caution, scrolling through function settings while installer set-up mode may result in altered settings.

Is a Password Required? **NO**

1. How to enter installer set-up

- a. From the home screen, press "SYSTEM" on the left hand side of the screen. Five of the seven buttons along the bottom row should become blank.
- b. Press the third button in from the left and right simultaneously. Hold for several seconds and until the display changes.
- c. Two scrollable settings will be displayed. The up/down arrows in the center of the screen scroll through "functions" menu. The up/down arrows to the right adjust the specific setting for the displayed function.



2. Determine system characteristics through T-Stat

- a. Scroll through installer set-up function options accessed in Step 1 by pressing the down arrow on the center function menu option
- b. Function Code 172, setting 1 is for Conventional Forced Air
- c. Function Code 173, setting 0 is for Air-to-Air Heat Pump
- d. Function Code 174 (settings 0,1, or 2) is the number of cooling compressor stages
- e. Function Code 176 (settings 0,1,2, or 3) is the number of Heat Stages/Backup heat stages, and compressor stages
- f. Function Code 342 determines if an outdoor sensor is configured. Setting 1 means there is an outdoor sensor installed and 0 means there is not. If 0 is selected, lockout options will not be displayed in the function menu.
- g. **SCROLLING THROUGH THE SETTINGS MENU ON THE FAR RIGHT IN EACH FUNCTION PERMANENTLY SAVES CHANGES UPON EXITING THE INSTALLER SETUP.**
DO NOT SCROLL THROUGH SETTINGS OPTIONS TO THE FAR RIGHT, SIMPLY VIEW WHAT THEY ARE.

3. Check Compressor Lockout settings

- a. From the installer set-up mode, scroll down through the functions menu (up/down arrows in the center of the screen) to option **350**
- b. The settings for this function is displayed on the right. "0" means that the compressor lockout is disabled. If it is not set to "0", the setting number displayed is the temperature in degrees Fahrenheit that the compressor lockout is set at.
- c. Compressor Heating Lockout must be set to "Disable" or 5 degrees to meet PTCS specification

4. Check Strip Heat settings

- a. From the installer set-up mode, scroll down through the functions menu (up/down arrows in the center of the screen) to option **360**
- b. The settings for this function are displayed on the right. "0" means that the auxiliary heat lockout is disabled. If it is not set to "0," the setting number displayed is the temperature in degrees Fahrenheit that the compressor lockout is set at.
- c. Auxillary Heat Lockout (strip heat lockout) must be set to "35" or lower to meet PTCS specification

PTCS Heat Pump Thermostat Support Sheet

Manufacturer: Honeywell VisionPRO IAQ

Thermostat Models: YTH9421C1010, YTH9421C1002, TH9421C1004

5. Access Test Mode for testing system at full capacity

- a. From the installer set-up menu accessed in Step 1, scroll through the functions menu by pressing the down arrow in the center of the screen until "TEST" appears on the left.
 - A. Heating mode: With "TEST" displayed on the left, press the up/down arrows on the center set of arrows until **3** is displayed in the top center of the screen. Once System Test 3 is selected, press the up/down arrows on the far right of the screen to select the stage of heating you desire to test in.
If unit is a single stage system, when testing in heating mode do not scroll to 2 on the right. This will cause strip heat to come on. The number of heat stages including strip heat is displayed in the number on the far right.
 - B. Cooling mode: With "TEST" displayed on the left, press the up/down arrows on the center set of arrows until **1** is displayed in the top center of the screen. Once System Test 1 is selected, press the up/down arrows on the far right of the screen to select the stage of cooling you desire to test in.
 - C. Wait at least 5 minutes before taking static pressure readings and inserting flow plate for TrueFlow plate test. Listen to ensure fan has staged up completely.
 - D. Wait at least 20 minutes before doing temperature split readings for refrigerant test. The longer the system is allowed to run, the more likely it will reach a steady state.
 - E. **The system tests automatically time out after 30 minutes of inactivity. Changing the selected test or stage automatically resets the timer back to 0 and restarts the test.**

6. Exit Test Mode

- a. System tests automatically time out after 30 minutes of inactivity. Test mode runs for 30 minutes by default.
- b. Press "DONE" on the bottom left at any time to exit test modes.

7. Exit Set-Up Mode

- a. Select "DONE"
- b. If left alone, system set-up automatically times out after 30 minutes of inactivity and returns to original settings
- c. **SCROLLING THROUGH THE SETTINGS MENU ON THE FAR RIGHT IN EACH FUNCTION PERMANENTLY SAVES CHANGES UPON EXITING THE INSTALLER SETUP. DO NOT SCROLL THROUGH SETTINGS OPTIONS ON THE FAR RIGHT, SIMPLY VIEW WHAT THEY ARE.**

Caution, scrolling through function settings while in installer set-up mode may result in altered settings.

Resources: Honeywell Technical Support: 1-800-468-1502

Source: http://www.forwardthinking.honeywell.com/products/thermostats/thermostat_products.html

PTCS Heat Pump Thermostat Support Sheet

Manufacturer: Lennox iComfort Wi-Fi

The Lennox iComfort is a communicating t-stat compatible with iComfort enabled units only

CAUTION: On the first screen entering installer set-up mode, do not press "Reset"; doing this resets all settings to factory defaults

Is a Password Required? **NO**

1. How to enter installer set-up

- On Home screen, press and hold for 5 seconds the LENNOX icon in the bottom right corner
- A warning screen pops up, press "Yes" to proceed
Do Not Press RESET
- You are now in the installer set-up feature



2. Check Compressor Lockout settings - *Lennox refers to this feature as "Low Balance Point"*

- From the installer set up home screen, press "Equipment" in the top center of the screen
- Select "System" from the menu, and press the "Edit" button on the right
- On the menu to the left, press the scroll down button to "Low Balance Point". The compressor lockout temperature should be displayed next to the scroll down menu. If "Low Balance Point" is not displayed, the compressor lockout has not been configured.
- Click the "back" button to return to the previous screen without changing any settings
- Do not hit the reset button at any time**

3. Check Strip Heat settings - *Lennox refers to this feature as "High Balance Point"*

- From the installer set up home screen, press "Equipment" in the top center of the screen
- Select "System" from the menu, and press the "Edit" button on the right
- On the menu to the left, press the scroll down button to "High Balance Point". The strip heat lockout temperature should be displayed next to the scroll down menu. If "High Balance Point" is not displayed, the compressor lockout has not been configured.
- Click the "back" button to return to the previous screens without changing any settings
- Do not hit the reset button at any time**

4. Access Test Mode for testing system at full capacity

- On the system devices screen (screen entered when you hit the back button once to exit looking at high/low balance point) click on the "Tests" button in the top center of the screen
- Select the test you wish to run. Test mode runs for 30 minutes for each mode selected, or until cancelled:
 - Cooling mode: select "Cooling - Maximum Rate" and press "Start"
 - Heating mode: select "HP Heat - Maximum Rate" and press "Start"
- Always select "Max" setting for determining flow in test mode. Test mode enables fan on high setting without allowing auxiliary backup heat to come on.
- Wait at least 10 minutes before taking static pressure readings and inserting flow plate for TrueFlow plate test
- Wait at least 20 to 25 minutes before doing temperature split readings for refrigerant test. The longer the system is allowed to run, the more likely it will reach a steady state.

PTCS Heat Pump Thermostat Support Sheet

Manufacturer: Lennox iComfort Wi-Fi

The Lennox iComfort is a communicating t-stat compatible with iComfort enabled units only

5. Exit Test Mode

- a. Press the "Next" button when you are finished running in your desired test mode.
- b. A screen pops up that says "The Testing Process is Finished"; on this screen press "Exit" and it will return to the home screen

6. Exit Set-Up Mode

- a. From System devices screen, (screen entered when you hit the back button to exit looking at high/low balance point), press "Next"
- b. A screen pops up that says "The Testing Process is Finished"; on this screen press "Exit" and it will return to the home screen

CAUTION: On the first screen entering installer set-up mode, do not press "Reset"; doing this resets all settings to factory defaults

Resources: Lennox customer support: 1-800-9-LENNOX. Technical support only available to authorized Lennox dealers.

Source: Lennox installers system set-up guide, revision 506920-01
http://www.lennox.com/pdfs/installation_maintenance/Lennox_iComfortWiFi_Setup.pdf

PTCS Heat Pump Thermostat Support Sheet

Manufacturer: Nest I, Nest II, Nest III

Thermostat Models: T100577, T200577, T3007ES

Is a Password Required? **NO**



1. How to enter installer set-up

- a. Press face of thermostat
- b. Rotate until Gear icon is on the top (Settings) and press the face of the thermostat
- c. Screen will automatically default to the home screen after 1 minute of inactivity

2. Determine system characteristics through T-Stat

- a. Press face of thermostat
- b. Rotate until Gear icon is at the top (Settings) and press the face of the thermostat
- c. Rotate until "Equipment" is displayed and press thermostat face
- d. Equipment detected will be displayed. With "Continue" highlighted in blue, press thermostat face again
- e. The system information will be displayed
- f. Press the thermostat face again and equipment settings will be displayed

3. Check Compressor Lockout settings

- a. From Equipment settings accessed in Step 2, rotate until "Heat Pump" is highlighted and press the thermostat face
- b. "O" or "B" will be highlighted, press face of thermostat to continue. **Caution, any changes made will be permanent.**
- c. The screen will show "Use the heat pump compressor when the temperature is above: XX", "Always" or up to "5" degrees should be highlighted to meet the specification.
- d. To continue to check strip heat settings, press the thermostat face again

4. Check Strip Heat settings

- a. Follow steps 3-a through 3-d to view strip heat temperature settings
- b. The screen will show "Use the heat pump aux. heat when the temperature is below: XX", 35 degrees or below must be selected to meet the specification
- c. With "Done" highlighted in blue, press the thermostat face to return to Equipment settings

5. Access Test Mode for testing system at full capacity

- a. Follow steps 2-a through 2-e to reach system information settings
- b. When system information is displayed, rotate dial to select "Test", press thermostat face
- c. To select the test you wish to run:
 - A. Heating Mode: press face of thermostat as "Heating" should already be selected
 - B. Cooling mode: rotate dial to select "heat pump cooling" and press face of thermostat
- d. Wait at least 10 minutes before taking static pressure readings and inserting flow plate for Trueflow plate test.
- e. Wait at least 20 to 25 minutes before doing temperature split readings for refrigerant test. The longer the system is allowed to run, the more likely it will reach a steady state

PTCS Heat Pump Thermostat Support Sheet

Manufacturer: Nest I, Nest II, Nest III

Thermostat Models: T100577, T200577, T3007ES

6. Exit Test Mode

- a. While in test mode, with "Done" highlighted, press the face of the thermostat
- b. System information will be displayed, "Continue" will be highlighted, press thermostat face again
- c. Equipment settings will be displayed, "Done" will be highlighted, press thermostat face again to fully exit

7. Exit Set-Up Mode

- a. From Settings screen, rotate to "Done" and press the thermostat face
- b. If screen is left untouched for 1 minute it will return to the home screen by default

Resources: <https://nest.com/>

Sources: <https://nest.com/support/thermostat/>

PTCS Heat Pump Thermostat Support Sheet

Manufacturer: Trane

Thermostat Models: XL824, TCONT824

To avoid making permanent changes to the system NEVER press "Save" when in Installer set-up mode.

Is a Password Required? **NO**

1. How to enter installer set-up

- Press "MENU" in the lower left corner of the home screen
- Press "SERVICE" to access the service menu
- Press "TECHNICIAN ACCESS" followed by "PROCEED"
- Press "INSTALLATION WIZARD"
- Once in Installer set-up, individual parameters can be configured and modified. Press the up and down arrows to scroll through all available settings.
- The screen will automatically default to the home screen after 10 minutes of inactivity



2. Determine system characteristics through T-Stat

- Press "MENU" in the lower left corner of the home screen
- Press "SYSTEM INFO" to display basic system characteristics such as software version

3. Check Compressor Lockout settings

- From the Installer set-up menu accessed in step 1, use the up and down arrows to scroll to group 7, "LOCKOUT SETTINGS"
- Verify lockout settings by pressing the "COMPRESSOR LOCKOUT" option, selecting "EDIT", followed by "NEXT" to view
- Verify "Disable" is selected. If "Enable" is selected, continue to next step.
- Press "SET" to view the lockout settings. **Caution, any changes made will be permanent. DO NOT PRESS "SAVE", Press "EXIT" to leave lockout settings menu without making any changes to the settings.**
- Compressor Heating Lockout must be set to "Disable" or 5 degrees to meet PTCS specification
- NOTE- If no outdoor sensor is enabled, lockout settings will not be displayed as selectable options

4. Check Strip Heat settings

- From the Installer set-up menu accessed in step 1, use the up and down arrows to scroll to group 7, "LOCKOUT SETTINGS"
- Verify lockout settings by pressing the "AUXILIARY HEAT LOCKOUT" option, selecting "EDIT", followed by "NEXT" to view
- Verify "Enable" is selected. If "Enable" is selected, continue to next step.
- Press "SET" to view the lockout settings. **Caution, any changes made will be permanent. DO NOT PRESS "SAVE", Press EXIT to leave lockout settings menu without making any changes to the settings.**
- Auxillary Heat Lockout (strip heat lockout) must be set to "35" or lower to meet PTCS specification
- NOTE- If no outdoor sensor is enabled, lockout settings will not be displayed as selectable options

PTCS Heat Pump Thermostat Support Sheet

Manufacturer: Trane

Thermostat Models: XL824, TCONT824

5. Access Test Mode for testing system at full capacity

- a. Press "MENU" in the lower left corner of the home screen
- b. Press "SERVICE" to access the service menu
- c. Press "TEST MODE"
- d. Press "SYSTEM" to select the desired system test:
 - A. Cooling mode: Select "TEST COOL" and choose the highest stage available. Press "TEST" to begin testing in the selected mode.
Testing in Cooling mode with variable speed blower could run at least 10-15% less CFM than in heating mode.
 - B. Heating mode: Select "TEST COMPRESSOR HEAT" and choose the highest stage available. Press the "TEST" button to begin testing in selected mode
 - C. **If the "TEST COMPRESSOR HEAT" option is not displayed, return to the home screen and make a large call for heat of at least 10 degrees.**
- e. Each test will run for a maximum of 60 minutes or until manually terminated
- f. Wait at least 10 minutes before taking static pressure readings and inserting flow plate for TrueFlow plate test. Listen to ensure fan has staged up completely.
- g. Wait at least 20 to 25 minutes before doing temp split readings for refrigerant test. The longer the system is allowed to run, the more likely it will reach a steady state.

6. Exit Test Mode

- a. While in test mode, press "EXIT" to return to home screen

7. Exit Set-Up Mode

- a. From Installer Set-up, press "EXIT" to return to the home screen
- b. If screen is left untouched for 10 minutes it will return to the home screen by default

To avoid making permanent changes to the system NEVER press "Save" when in Installer set-up mode.

Resources: Trane Customer Support: 1-800-945-5884, Technical Support only available to authorized Trane dealers.

PTCS Heat Pump Thermostat Support Sheet

Manufacturer: Trane ComfortLink II

Thermostat Models: XL950, TZONE950AC52ZA

When in Installer set-up mode NEVER press the "save" button to avoid making permanent changes to the system. In the Service Menu, do not press the "Reboot" button

Is a Password Required? **NO**

1. How to enter installer set-up

- a. Press MENU on the home screen
- b. Press the "SERVICE" button
- c. From the service menu press the "INSTALLER SET-UP" button
- d. Enter menu option "Advanced Equipment" (section 5.2.2) to view current system settings
- e. Screen will automatically default to the home screen after 10 minutes of inactivity



2. Determine system characteristics through T-Stat

- a. To determine Software Version press the "? Help" button in the lower left corner from the home screen
- b. Press the "About" button in the lower left corner. Software release version should be displayed and should be at least version 2.2.2 or newer.

3. Check Compressor Lockout settings

- a. In the installer set-up advanced settings menu, press menu option "lockouts" in the lower right corner (section 5.2.8)
- b. Ensure "Disable" is selected. If "Enable" is selected, continue to next step.
- c. Click "SET" to view the lockout settings. **Caution, any changes made will be permanent.**
- d. Compressor Heating Lockout must be set to "Disable" or 5 degrees to meet specification

4. Check Strip Heat settings

- a. In the installer set-up advanced settings menu, press "Lockouts" in the lower right corner (section 5.2.8)
- b. Click "Enable". (If disable is set, the system will default to allowing strip heat to come on regardless of outdoor temperature).
- c. Click "set" to view the lockout settings. **Caution, any changes made will be permanent.**
- d. Select Auxiliary Heat Lockout and press "Enable"
- e. Compressor Heating Lockout must be set to "Disable" or 5 degrees to meet specification

PTCS Heat Pump Thermostat Support Sheet

Manufacturer: Trane ComfortLink II

Thermostat Models: XL950, TZONE950AC52ZA

5. Access Test Mode for testing system at full capacity

- a. Press "MENU" on the home screen
- b. Press the "SERVICE" button
- c. From the service menu press the "TEST MODE" button next to the installer setup button
- d. Select the "SYSTEM" button to select the desired system test:
 - A. Cooling mode: select "TEST COOL" and select the highest stage available. Press the "TEST" button to begin testing in selected mode. Testing in Cooling mode with variable speed blower could run at least 10-15% less CFM than in heating mode.
 - B. Heating mode: select "TEST COMPRESSOR HEAT" and select the highest stage available. Press the "TEST" button to begin testing in selected mode
 - C. **If the "TEST COMPRESSOR HEAT" option is not displayed, return to the previous test mode screen and select the "VARIABLE SPEED" button on the right of the screen. Once in the variable speed section, select "TEST CHARGE - HEATING". Press the up arrow to stage the system to 100% and select "START TEST"**
- e. Each test will run for a maximum of 30 minutes or until manually terminated
- f. Wait at least 10 minutes before taking static pressure readings and inserting flow plate for TrueFlow plate test. Listen to ensure fan has staged up completely.
- g. Wait at least 20 to 25 minutes before doing temp split readings for refrigerant test. The longer the system is allowed to run, the more likely it will reach a steady state.

6. Exit Test Mode

- a. While in test mode, press "EXIT" to return to home screen

7. Exit Set-Up Mode

- a. From System Setup screen, press "BACK" to return to the home screen
- b. If screen is left untouched for 10 minutes it will return to the home screen by default

When in Installer set-up mode NEVER press the "save" button to avoid making permanent changes to the system. In the Service Menu, do not press the "Reboot" button

Resources: Trane Customer Support: 1-800-945-5884, Technical Support only available to authorized Trane dealers.

Notes: For 32 degree strip heat lockout, software version must be 2.2.2 or higher