

# PTCS Lockouts and Balance Points: Reference Guide

## Importance of Lockouts

- Lockout controls minimize use of strip heat, maximizing energy savings.
- Incorrect lockout settings result in the majority of inspection failures.



## Auxiliary (Strip) Heat Lockout

PTCS Spec: Set auxiliary heat lockout to 35°F or lower.  
Controlled through:

- Thermostat connected to Wi-Fi weather station.
- Thermostat paired with outdoor temperature sensor.
- Outdoor unit control board or mechanical lockout.

**Note:**  
Set auxiliary (strip) heat lockout at or below 35°F.

## Compressor Lockout

PTCS Spec: 5°F or lower compressor lockout, disabled or not installed:

- Controlled through thermostat.
- Despite low outdoor temperatures, compressors can still contribute to heating the house.

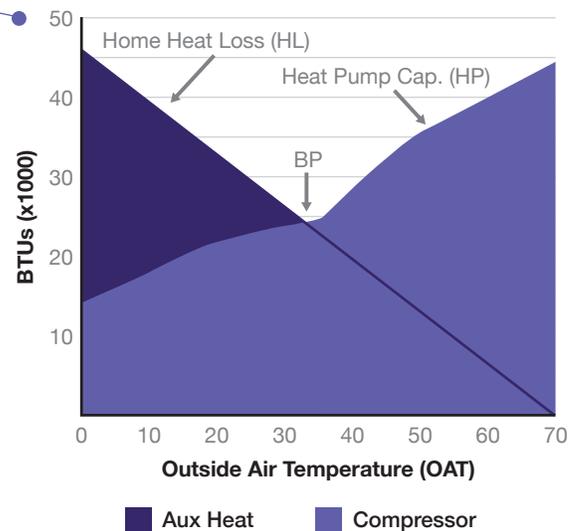
**Note:**  
Set at 5°F or less or do not lock out the compressor.

## Balance Point

If system is not sized correctly, you run into comfort issues when strip heat is locked out.

- Balance point can be no greater than 30°F.
- Heat pump capacity drops at colder temperatures.

*Note:* Some manufacturers use different terminology for lockouts, such as “high balance point” referring to the strip heat lockout temperature or “low balance point” referring to the compressor lockout temperature.



## PTCS Resources

For more information on the PTCS program visit:

PTCS Online School: [cleareresult.moodle.school](http://cleareresult.moodle.school)

PTCS Registry: [ptcs.bpa.gov](http://ptcs.bpa.gov)

YouTube: [youtube.com/user/BPATraining/videos](https://youtube.com/user/BPATraining/videos)

Contact PTCS at

[ResHVAC@bpa.gov](mailto:ResHVAC@bpa.gov) or 1.877.848.4074