Clement Boston Heat Pumps

Heat pump quote comparison checklist for Boston-area homes

For comparing ducted heat pump quotes on a house in Boston or the towns around it. Use it to describe the house the same way to everyone, to check each quote line by line, and to know what you should hold when the work is done.

1. Describe the house first

Write this down before anyone visits, so every quote answers the same problem.

- [ ] What heats the house now (oil, gas, propane, boiler, baseboard or a heat pump) and what cools it
- [ ] Where the ducts run, which floors they reach, and which rooms get little air
- [ ] Whether you want the heat pump to heat the whole house or keep the old system as backup
- [ ] The main breaker size on the electrical service, if you know it
- [ ] Where the oil tank sits, if there is one
- [ ] Any insulation or air sealing done, and the date of your last Home Energy Assessment
- [ ] Your electric company (Eversource, National Grid or a town light plant) and gas company

Current heat and cooling

Rooms that are uncomfortable

Electric and gas company

2. What every quote should show

A quote that leaves these out is hard to compare with one that includes them.

- [ ] A room-by-room load calculation (ACCA Manual J) at your town's design temperature, not a size by rule of thumb
- [ ] The make and model of the outdoor unit and air handler, with heating capacity at 5°F and the matched AHRI number
- [ ] Whether the equipment is on the ENERGY STAR cold-climate list and the Mass Save qualified list
- [ ] Duct test results (static pressure, return size, leakage) and every duct change as its own line
- [ ] The electrical work: circuits, disconnect, and any service upgrade
- [ ] Which permits are pulled (electrical, sheet metal, building, and the fire department permit for an oil tank)
- [ ] Backup heat: what stays, the switchover or lockout temperature, and the controls
- [ ] Removal or disconnection of the old system, noted on the invoice
- [ ] The rebate path the quote assumes, and what is not included

3. Questions to ask each installer

Ask everyone the same questions and note each answer.

- ☐ Are you in the Mass Save Heat Pump Installer Network?
- ☐ Who pulls each permit, and whose license will be on it?
- ☐ Where will the outdoor unit sit, on what stand, and how does it stay clear of snow and under the town's noise limit at the lot line?
- ☐ Will the line set be pressure tested with nitrogen and evacuated below 500 microns before the refrigerant is released?
- ☐ Will you charge by weight for the line length, and measure airflow and static pressure at startup?
- ☐ How long will the install take, and how long will the house be without heat?
- ☐ What does the equipment warranty cover, and who registers it?

Installer

Answers

Price before rebates

4. What you should hold at the end

Keep these with the house records. The rebate and any later repair both depend on them.

- ☐ Each permit and its final inspection
- ☐ The equipment model and serial numbers, and the AHRI certificate
- ☐ The dated invoice, listing the old system as removed or disconnected
- ☐ The commissioning record: pressure test and vacuum, charge, airflow and static readings
- ☐ The control settings, including the backup heat lockout temperature
- ☐ The warranty registration
- ☐ The signed rebate forms, including the whole-home verification form if it applies

General planning information, not an assessment of a particular house. Permit rules and rebate programs change; confirm them with your town's building department, your utility or light plant, and Mass Save.