

# InvestSmart with JEA Business Energy Upgrades HVAC Tune-up Form



## INSTRUCTIONS

- 1) HVAC tune-ups must be serviced and tested in accordance with the requirements specified within the 2018 Customer Participation Manual (e.g. refrigerant charge requirements, etc.).
- 2) HVAC contractors are required to complete the appropriate sections of this form as applicable. This rebate requires quality work and accurate documentation.
- 3) This form must be signed by the service technician who performed the system measurements and verified all data and the business owner/representative.
- 4) InvestSmart with JEA must receive a completed copy of this form along with all required supplemental documentation prior to release of a rebate check.
- 5) Actions taken during HVAC tune-ups are intended to reduce energy consumption through improved efficiency. All deficient items must be repaired or replaced in order to qualify for rebate.

## CONTRACTOR'S INFORMATION

HVAC Contractor's Name \_\_\_\_\_  
 Technician's Name (printed) \_\_\_\_\_  
 Certification# (if applicable) \_\_\_\_\_  
 License # \_\_\_\_\_  
 Date of tune-up \_\_\_\_\_

## CUSTOMER'S INFORMATION

Customer's Name \_\_\_\_\_  
 Premise# or Service Address \_\_\_\_\_  
 Customer's Phone # (\_\_\_\_\_) \_\_\_\_\_  
 Number of units tuned-up \_\_\_\_\_  
 JEA Account # \_\_\_\_\_

## STEP 1- CONDENSING UNIT (SPLIT SYSTEMS) OR PACKAGE UNIT INFORMATION (REQUIRED)

Unit No.	Make (Brand)	Model Number	Serial Number	Unit Location or Designation & Area Served (Identifying it from other units at this location)	Age (yrs)	Cooling (BTU/ton)	HP Heating (BTUh)
1							
2							
3							
4							

## STEP 2- MATCHING AIR HANDLER (FAN/COIL) OR FURNACE INFORMATION (REQUIRED)

Unit No.	Make (Brand)	Model Number	Serial Number	Air Handler Unit Location	Furnace Fuel Input (BTUh)	Nat. Gas or LP	Strip Heat kW
1							
2							
3							
4							

## STEP 3- CONTROLS (REQUIRED)

Unit No.	Measured Control Volts	Type Thermostat Manual/Auto/Prog.	Clg Set Point	Htg. Set Point	T'stat turns unit on/off at set points	If no, t'stat must be repaired	T'stat mounted on outside wall or near a heat source	If yes, heat source must be moved or t'stat insulated from outside wall
1								
2								
3								
4								

**STEP 4 – ELECTRICAL POWER (REQUIRED)**

Unit No.	System Operating Voltage	Phase	Compressor Rated Amps	Compressor Actual Amps	Cond. Fan Rated Amps	Cond. Fan Actual Amps	Evap. Fan Rated Amps	Evap. Fan Actual Amps	All Connections Tightened
1									
2									
3									
4									

**STEP 5 – FANS AND AIR FLOW (REQUIRED)**

Unit No.	Measured TD Across Indoor Coil**	Indoor Coil Cleaned & Inspected	Outdoor Coil Cleaned & Inspected	Fan Motor Bearings Lubricated	Filter Cleaned or Replaced	Clean Cond. Drains flow freely
1						
2						
3						
4						

**STEP 6 – REFRIGERANT CHARGE (REQUIRED)**

Unit No.	Refrigerant Type	Outdoor Temp.	Suction Pressure	Discharge Pressure	Repair any leaks and properly recharge	Is Suction Line fully insulated	Refrigerant Added or removed
1							
2							
3							
4							

**STEP 7 – TECHNICIAN'S & OWNER'S/REP. SIGNATURE (REQUIRED)**

I hereby certify that all HVAC equipment has been serviced in accordance with the manufacturer's/program guidelines, and that all the above information is accurate. I understand that JEA requires a completed copy of this document and all essential supplemental information prior to final processing of rebate requests.

Signature Service Technician: \_\_\_\_\_

Date: \_\_\_\_\_

Signature of Business Owner/Rep: \_\_\_\_\_

Date: \_\_\_\_\_