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PTCS Online Registry:

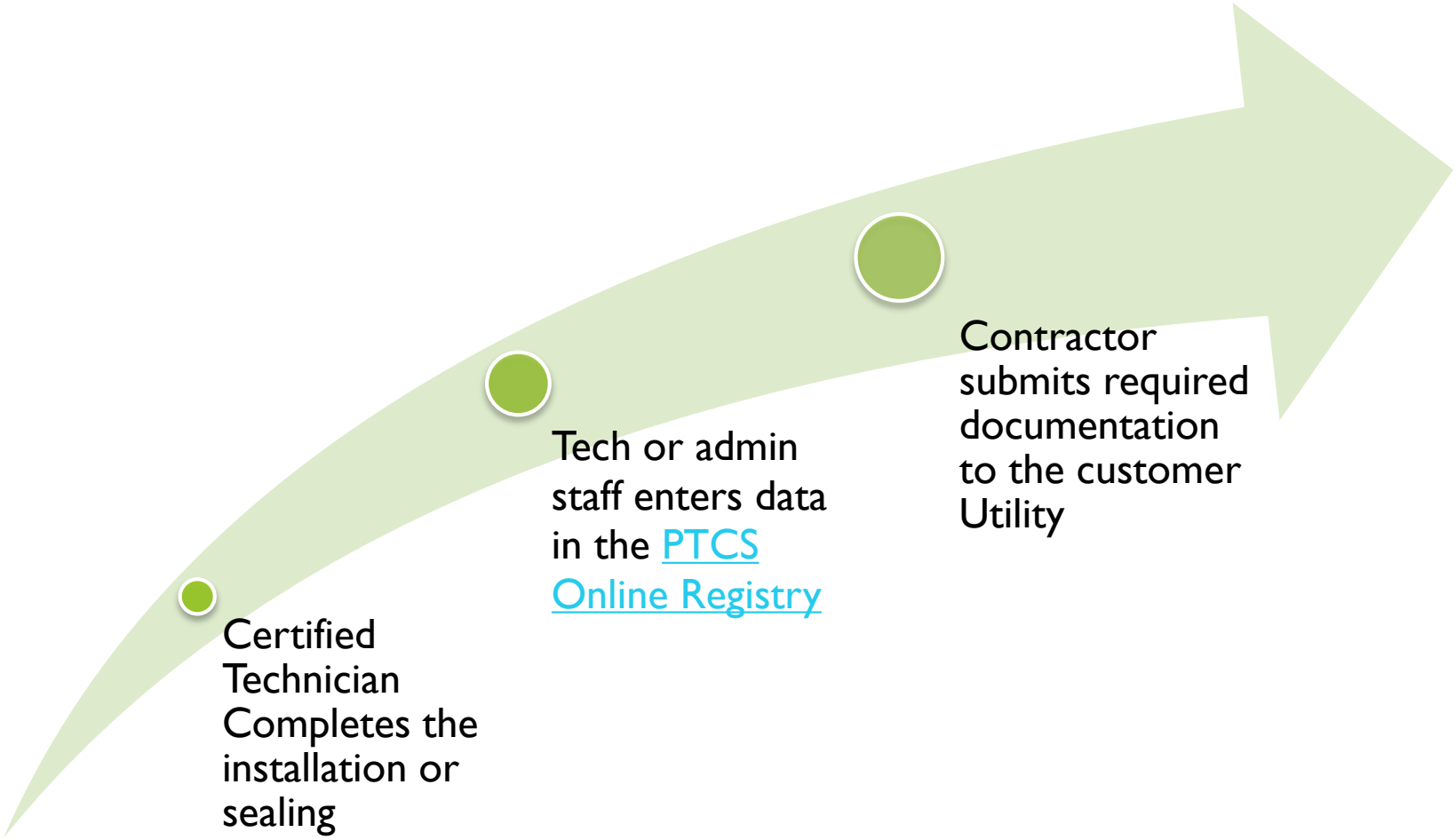
How to Enter & Search for Jobs

What is the Registry?

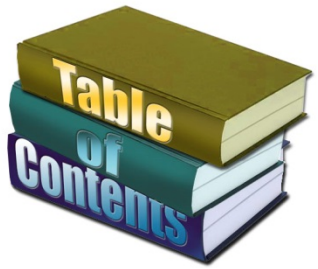
https://ptcs.bpa.gov/

- 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



Contents

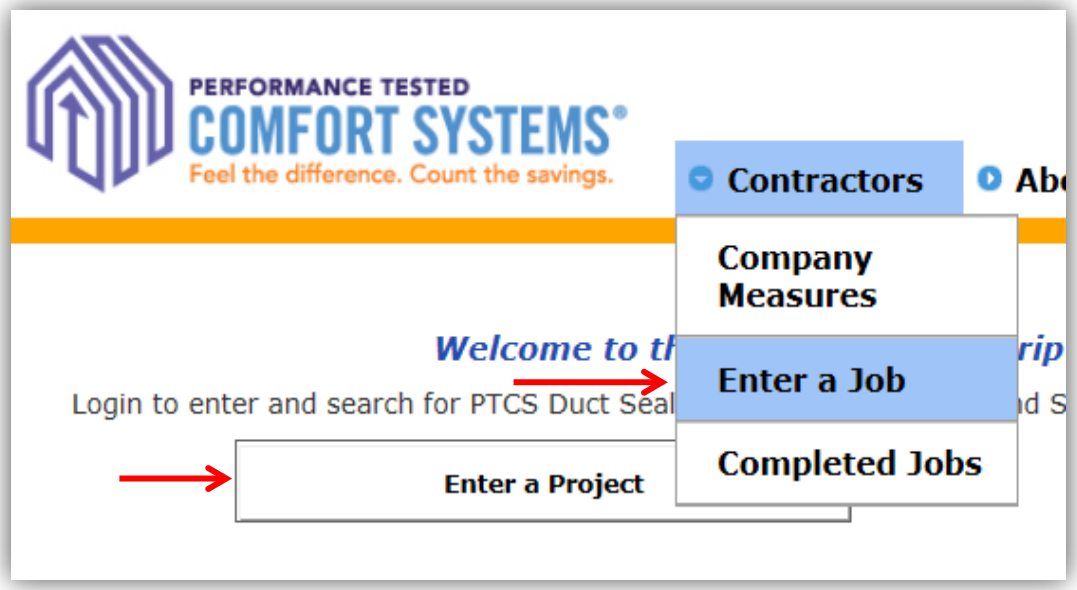


Before you start!

- Verify the online account is for the appropriate technician
- Ensure the account allows you to enter a job
  - To verify, go to the "My Account" tab and check to see if "Contractor" is listed as a role.
  - If it's activated, contact the ResHVAC team by email at ResHVAC@bpa.gov or call 1.800.941.3867.

Enter a Job

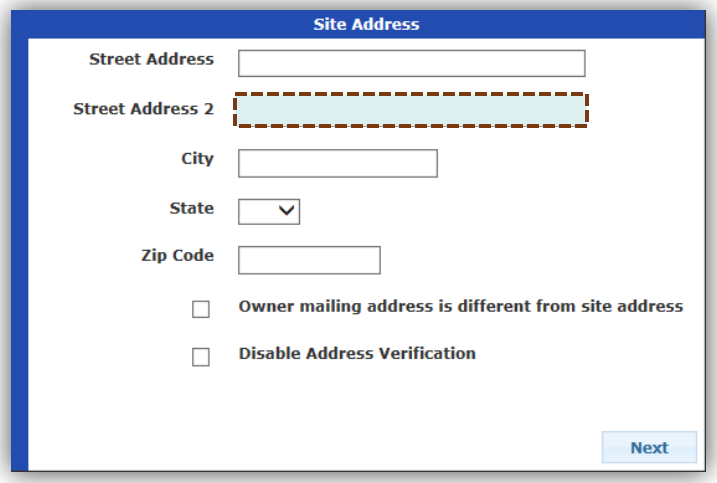
1) Log in to installing technician's account at ptcs.bpa.gov
2) Click "Enter a Project" or hover over "Contractors" and select "Enter a Job"



Site Address

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 fax to 877.848.4074 or email to ResHVAC@bpa.gov.

"Street Address 2" field used for lot numbers.



Site Address

5) Click the link of the correct address based on your input.

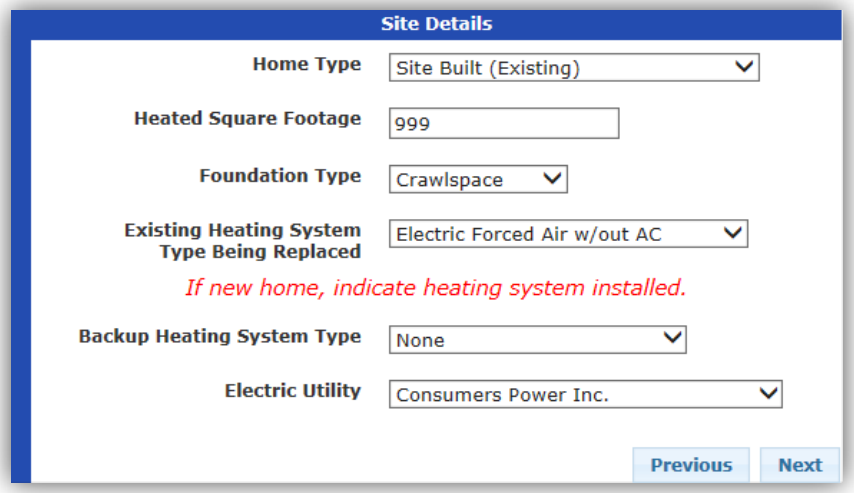
- Address not listed? Click "Previous" to edit or contact the ResHVAC team.

Site Details

6) Enter all site details

7) "Existing Heating System Type":

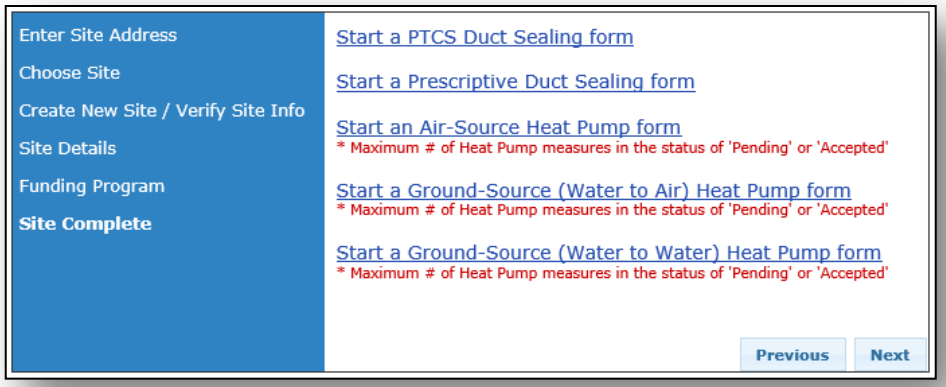
Duct Sealing	• Indicate heating system at the time of sealing
Heat Pump Install	• New site built: select newly installed heating system • Existing site built: select heating system being replaced



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.

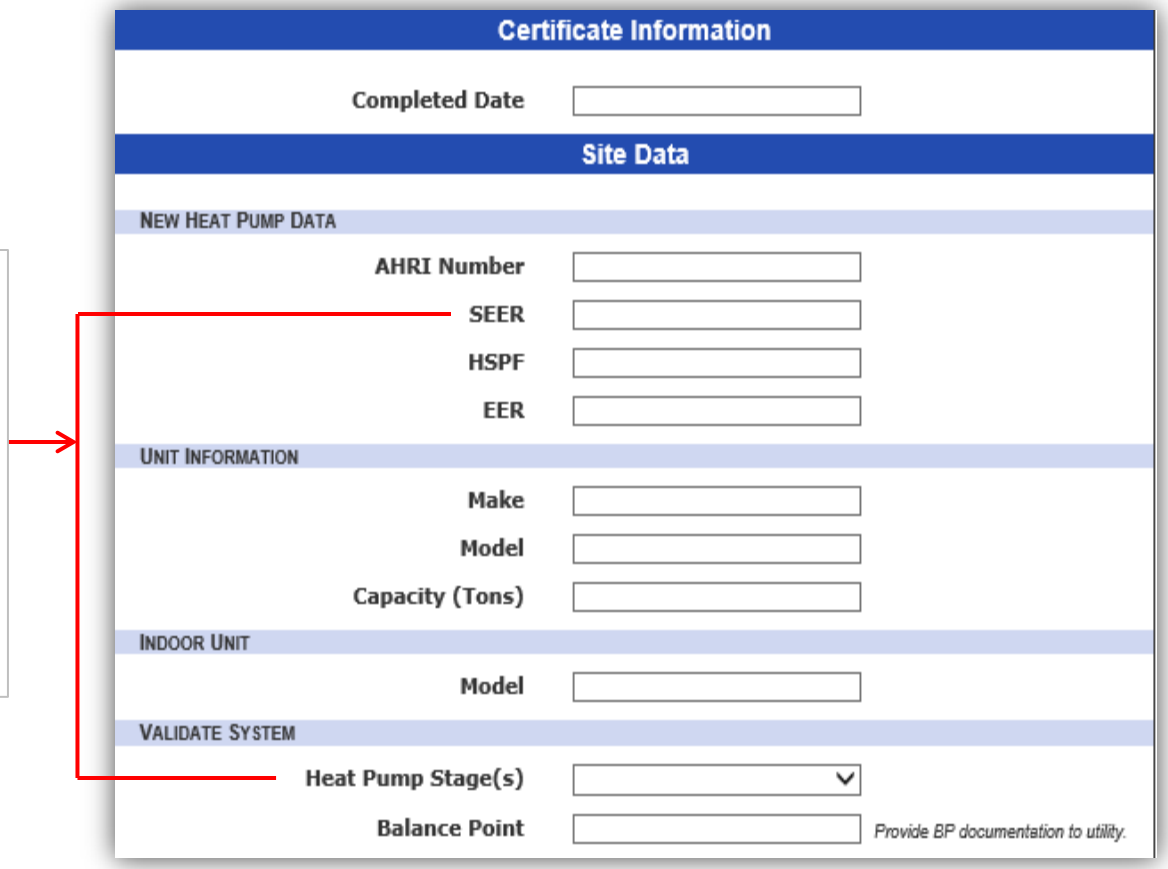


***Contact the PTCS Team if you don't see an option, but you or the technician received training.*

Measure Details: Air Source Heat Pump

Entering AHRI number will auto-populate all this information.

If the AHRI is not recognized, please contact program staff for support.



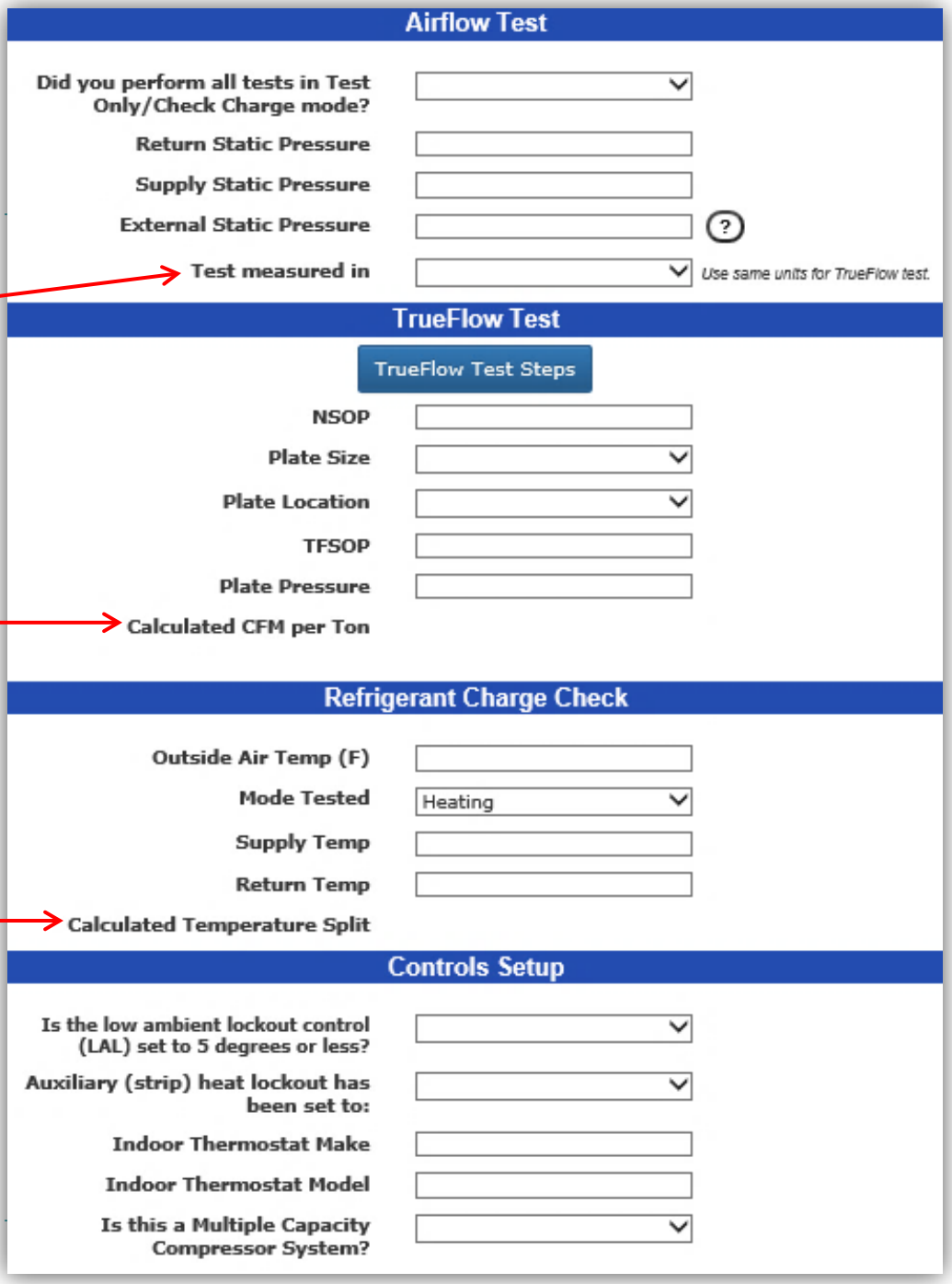
Measure Details:
Air Source Heat Pump, *con't*

Measurement unit type will apply to ESP and TrueFlow Test.

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

If Variable Speed and lower than 325, please contact BPA for support.

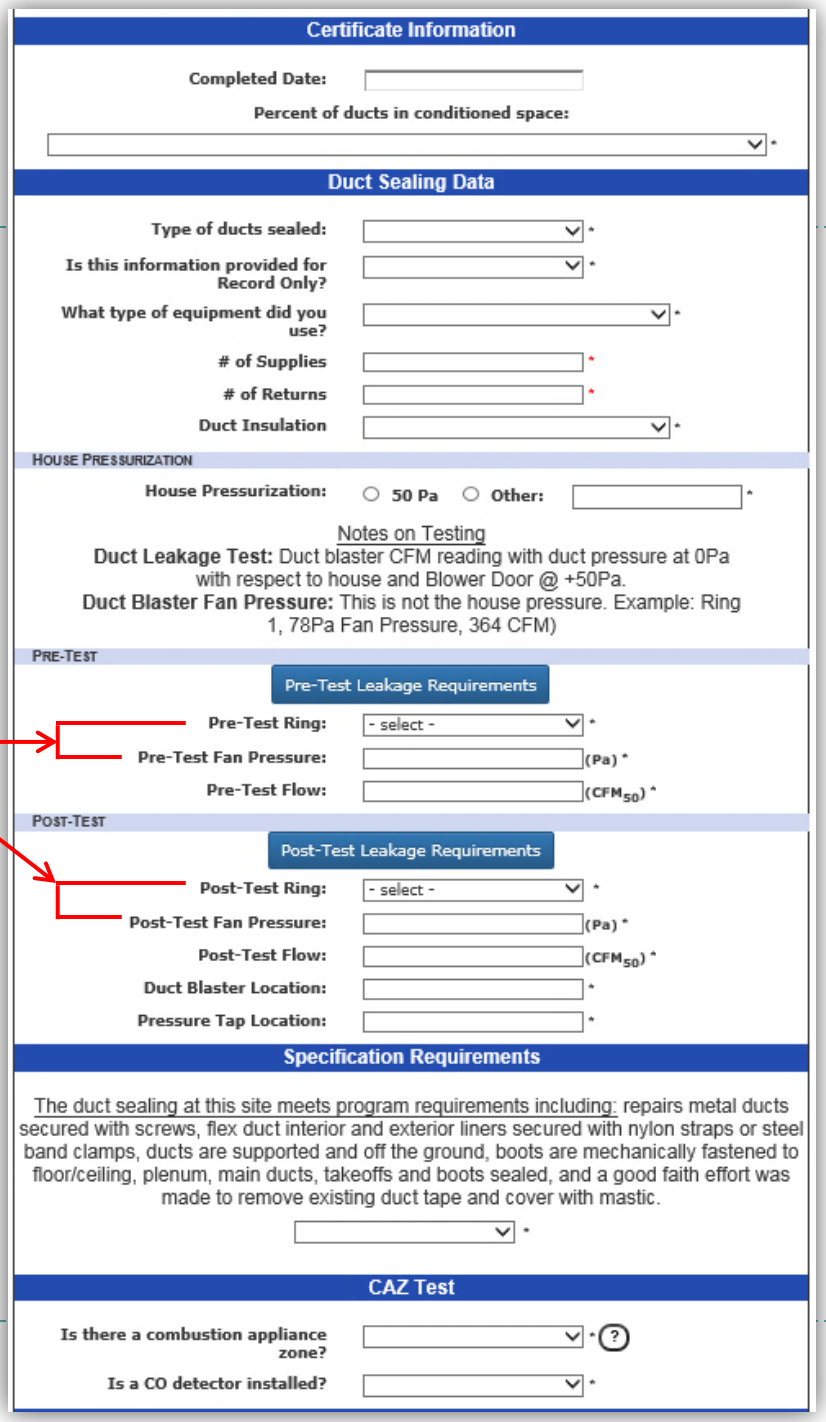
Temperature Split and Subcooling calculated using calculations from R-410A tables (located online).



Measure Details: PTCS Duct Sealing

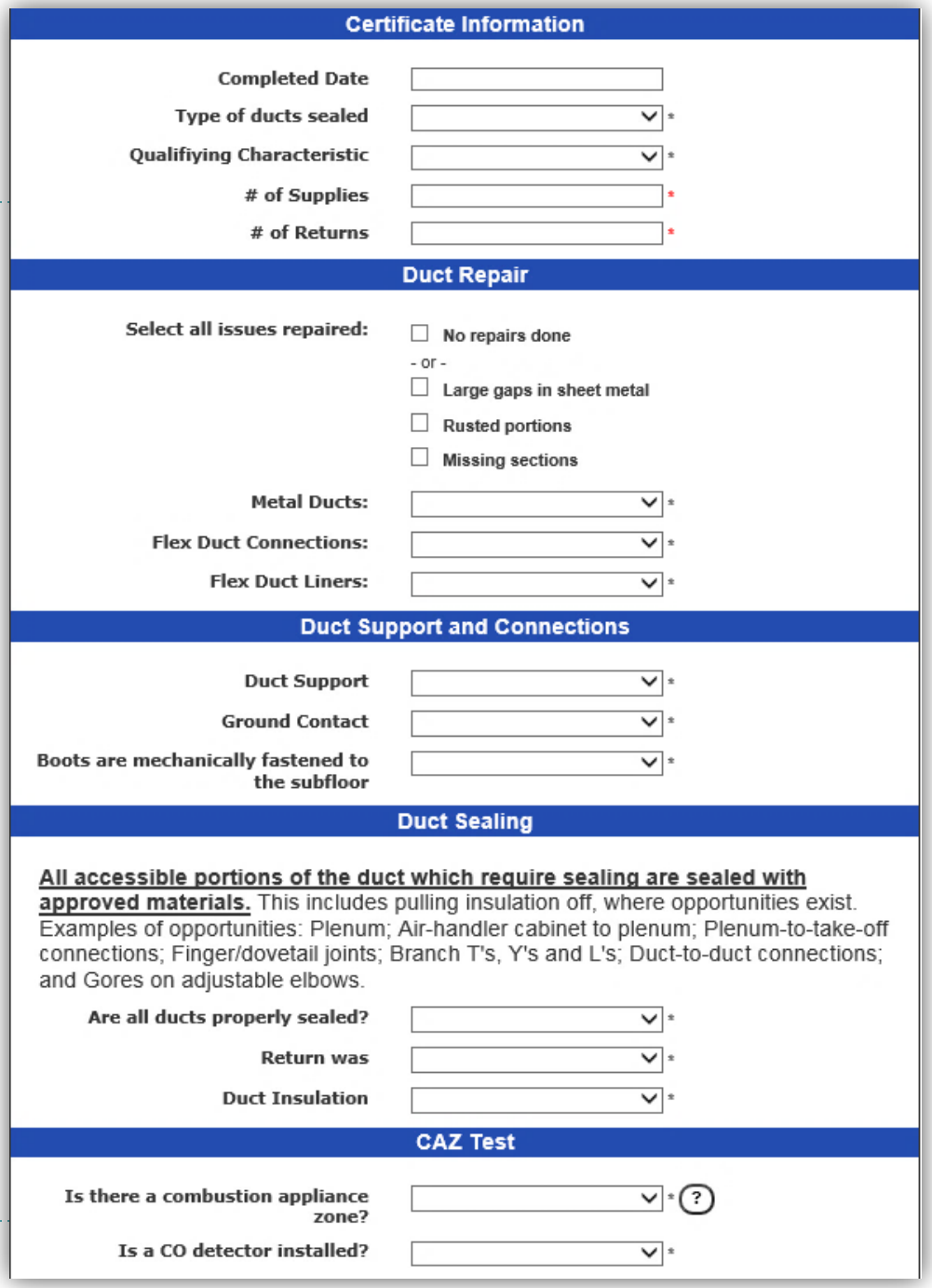
Leakage is calculated using the ring size and fan pressure. Calculated reduction is based on the calculated leakage and home square footage.

Duct blaster fan pressure is not the house pressure.



Measure Details:
Prescriptive Duct Sealing

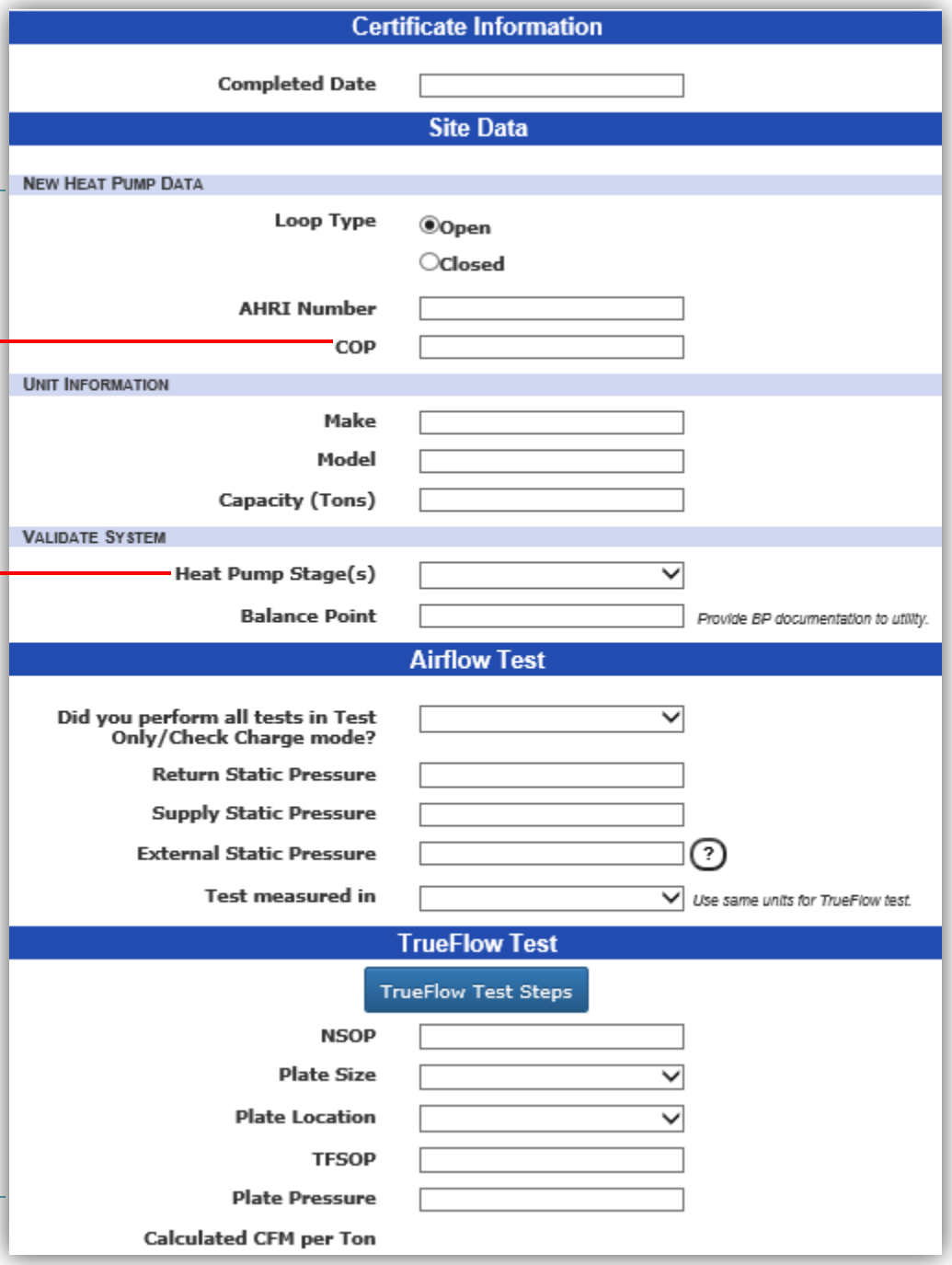
This measure records whether all opportunities were sealed. There are no calculations involved.



Measure Details:
Ground Source Heat Pump (Water to Air)

Entering AHRI number will auto-populate all this information.

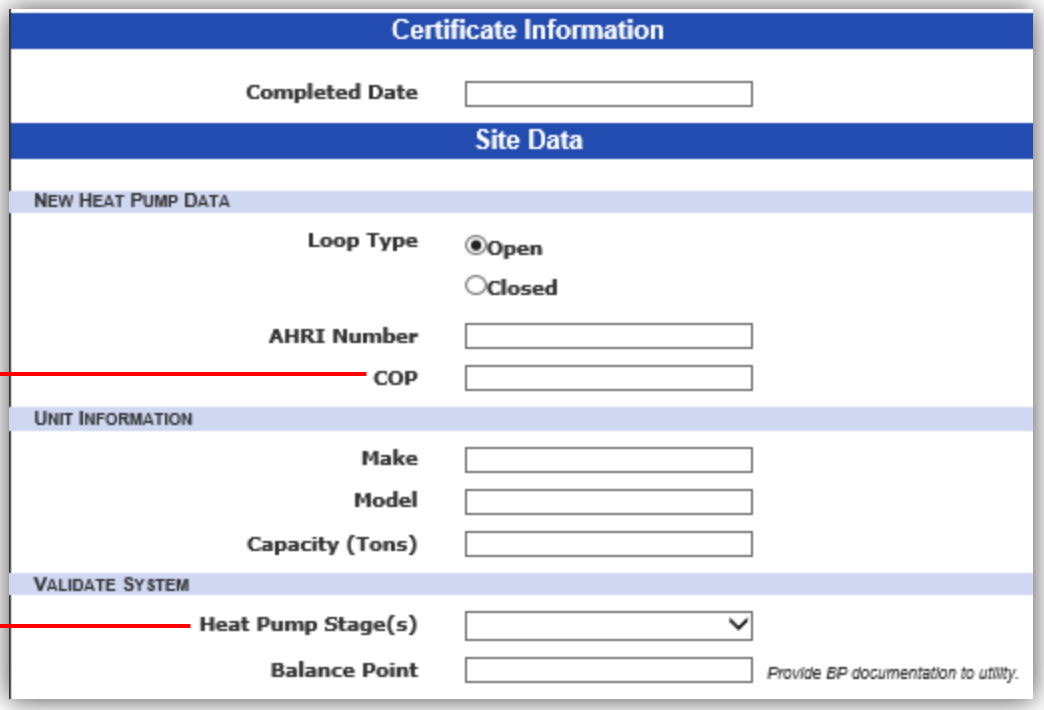
If the AHRI is not recognized, please contact program staff for support.



Measure Details:
Ground Source Heat Pump (Water to Water)

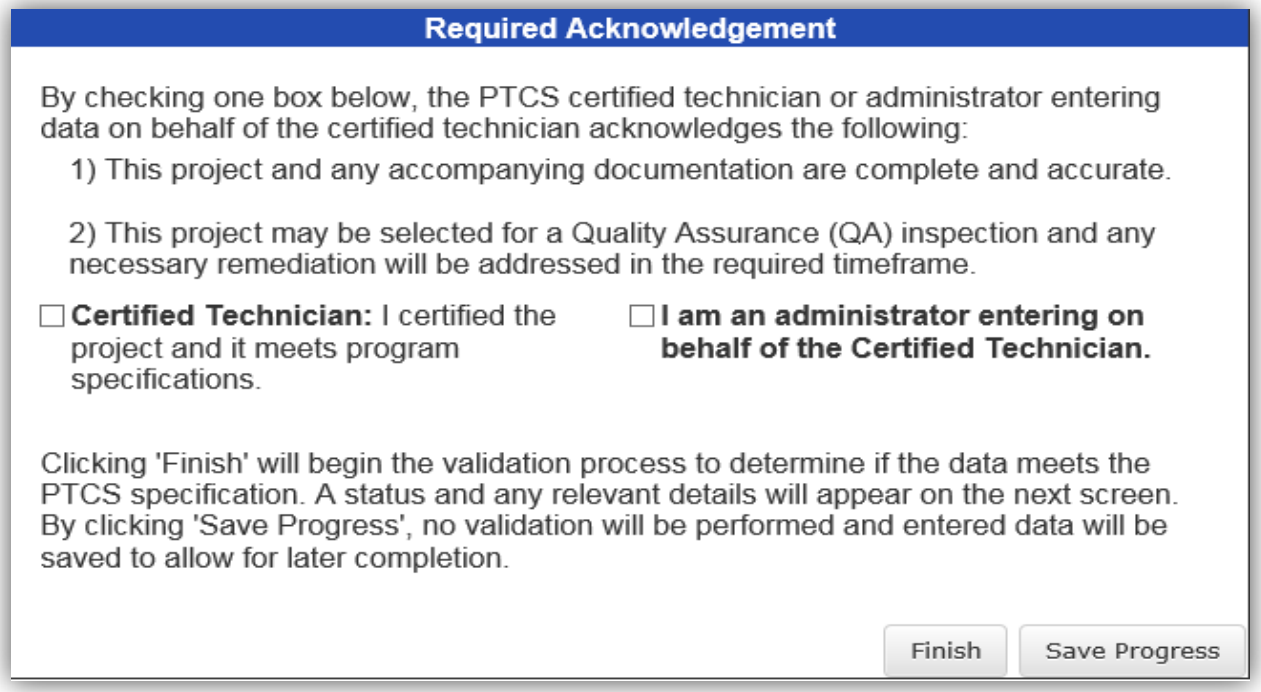
Entering AHRI number will auto-populate all this information.

If the AHRI is not recognized, please contact program staff for support.



Required Acknowledgement

Check the box if you are a technician or someone entering the data on behalf of the installing tech. This replaces the previously required handwritten signature.

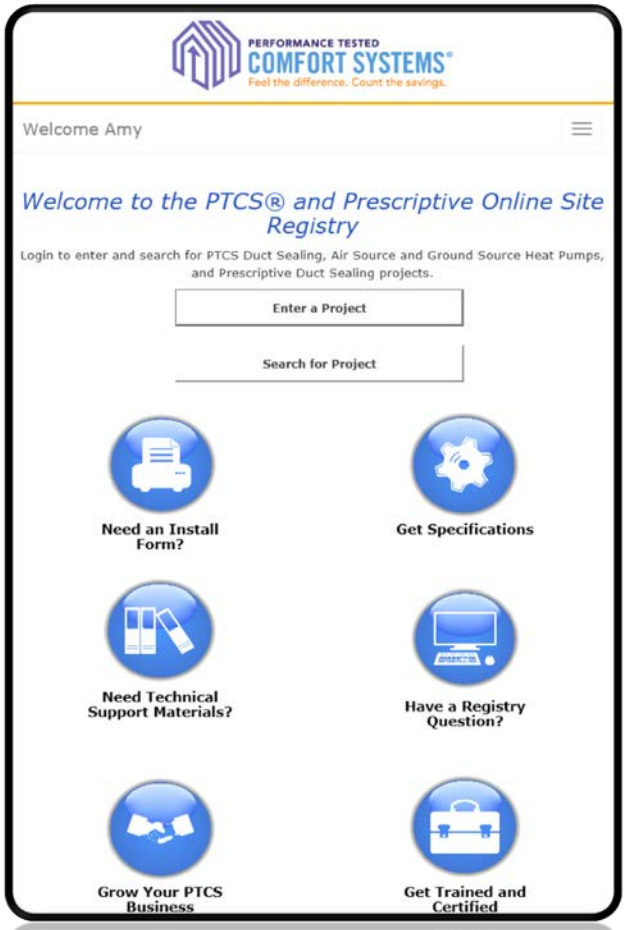


Saving Entry Progress

- 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
  2. Search for the measure using the address or measure ID
  3. Click "Continue Job"

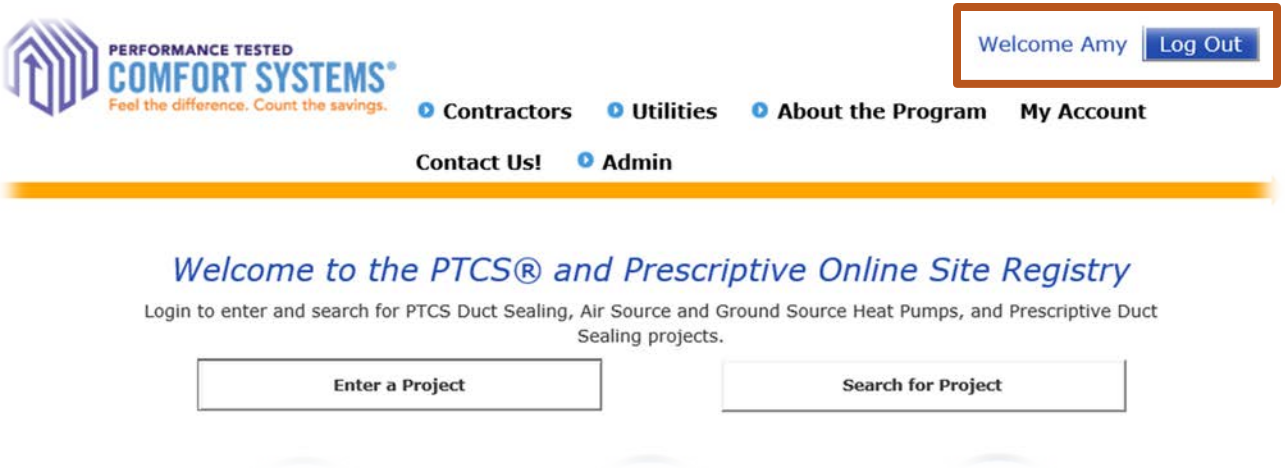
Enter on a Mobile Device

- Entry can be done using any mobile device with internet access. Offline access is a future goal.
- 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

- If you are entering work for one or multiple other technicians, please sign in using their specific account. Verify you are signed in correctly by checking their name at the top right-hand corner of the screen…



Troubleshoot

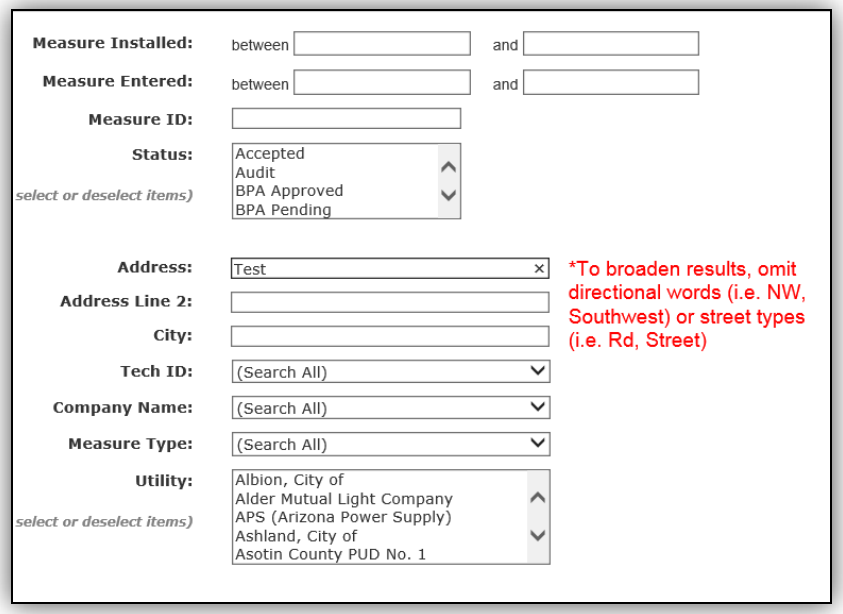
- Contact the PTCS team if:
  - Address isn't validating
  - AHRI number isn't validating
  - Need to enter in a second system
  - Can't find an entered job
  - Need to edit an address or submitted data
  - Need immediate review of "Pending" entry (reviewed daily)
  - Have general questions or feedback for improvement

Search for a Completed Job

- 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 to additional access.

Search for a Completed Job

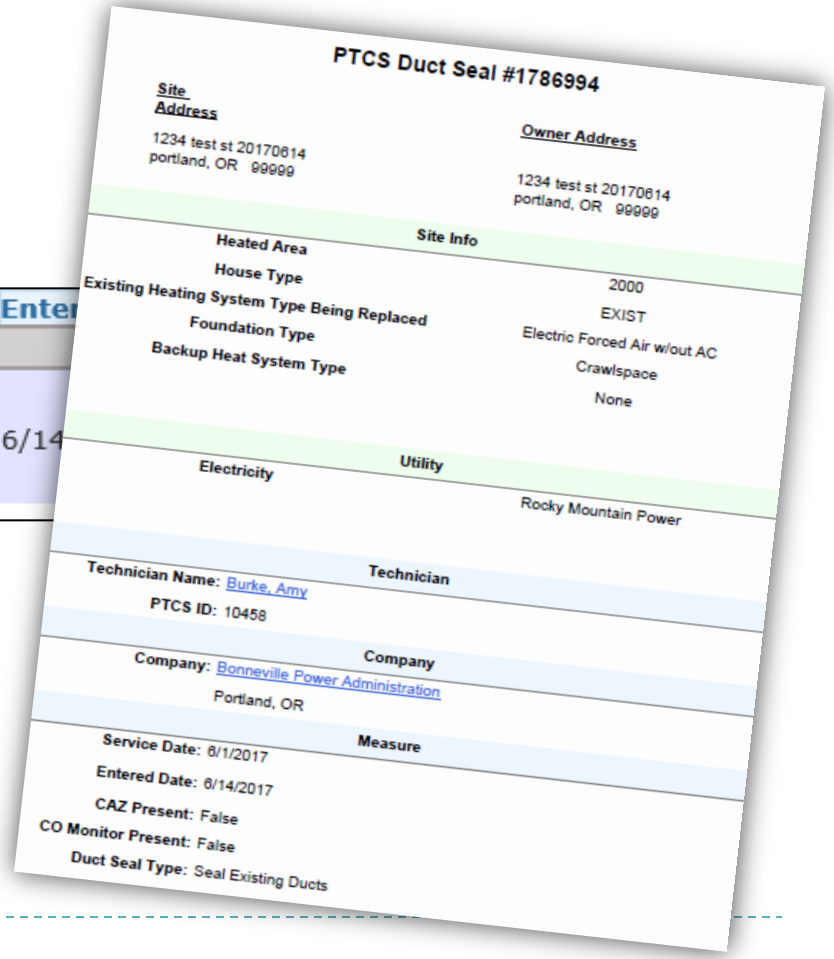
1. Sign in to the Online Registry with the appropriate account
2. Click "Search for Project"
3. Enter as little data as possible (i.e. only "1234" in the address "1234 Main St". Being too specific might yield no results.



Find the Registry Installation Report

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

	Measure ID	Measure Type	Enter
1234 test st 20170614 portland, OR			
Edit Measure View History	1786994	PTCS Duct Seal	6/14



PTCS Duct Seal #1786994

Site Address
1234 test st 20170614
portland, OR 99999

Owner Address
1234 test st 20170614
portland, OR 99999

Site Info

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

Utility

Electricity	Rocky Mountain Power

Technician

Technician Name: Burke, Amy
PTCS ID: 10458

Company

Company: Bonneville Power Administration
Portland, OR

Measure

Service Date: 6/1/2017
Entered Date: 6/14/2017
CAZ Present: False
CO Monitor Present: False
Duct Seal Type: Seal Existing Ducts

Documentation Requirements

- 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

- Required documentation of 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 www.bpa.gov/goto/reshvac)

Notify Utility of the completed job

- 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?

Contact the PTCS Team:

Phone: (800) 941-3867

Email: ResHVAC@bpa.gov

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