



PERFORMANCE TESTED
COMFORT SYSTEMS[®]
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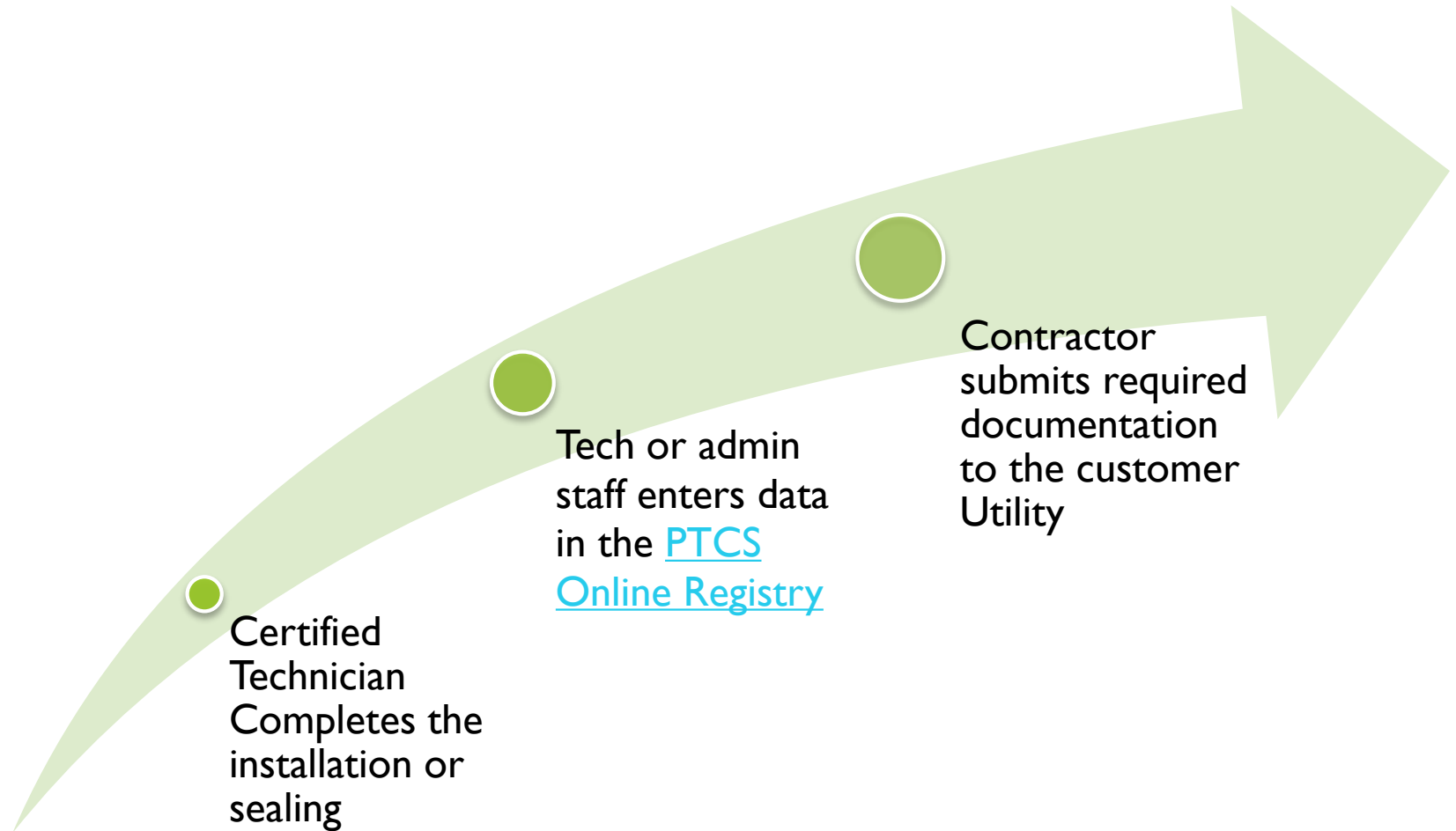
PTCS Online Registry: How to Enter & Search for Jobs

What is the Registry?

<https://ptcs.bpa.gov/>

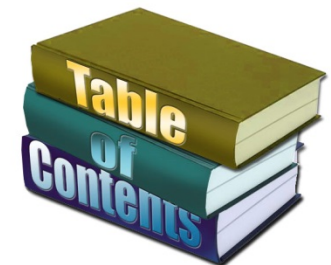
- ▶ It is a the primary online tracking tool for the PTCS and Prescriptive Duct Sealing Programs.
 - ▶ Technicians enter all completed work here
 - ▶ Utilities review completed work here
 - ▶ Tracks status of Certified Technicians
 - ▶ Tracks quality assurance inspections

Program Process



Contents

- ▶ Before you start!
- ▶ Enter a job
- ▶ Enter a job for another user
- ▶ Troubleshoot
- ▶ Search for a completed job
- ▶ Find the Registry Installation Report
- ▶ Documentation requirements
- ▶ Notify utility of the completed job

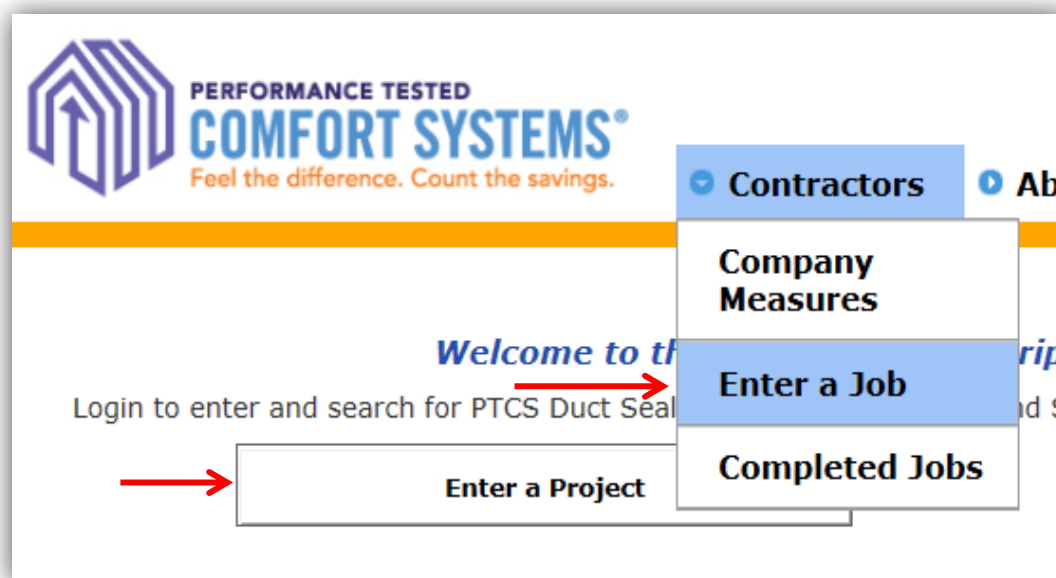


Before you start!

- ▶ 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

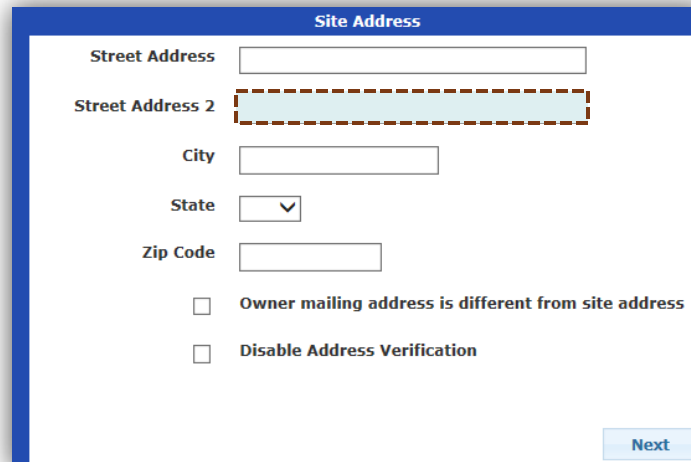
- 1) Log in to installing technician's account at ptcs.bpa.gov
- 2) Click “Enter a Project” or hover over “Contractors” and select “Enter a Job”



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.

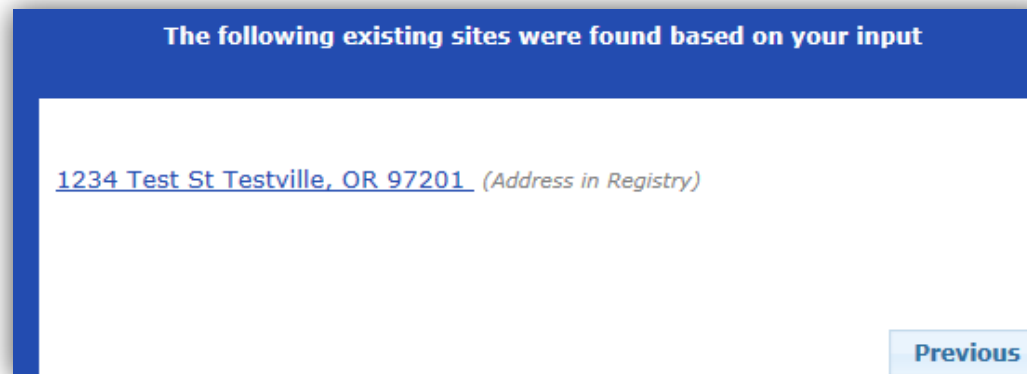


The screenshot shows a web form titled "Site Address". It contains the following fields and options:

- Street Address: [Text input field]
- Street Address 2: [Text input field, highlighted with a dashed red border]
- City: [Text input field]
- State: [Dropdown menu]
- Zip Code: [Text input field]
- Owner mailing address is different from site address
- Disable Address Verification
- Next: [Button]

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

Site Details

Home Type

Heated Square Footage

Foundation Type

Existing Heating System Type Being Replaced

If new home, indicate heating system installed.

Backup Heating System Type

Electric Utility

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.

Enter Site Address	Start a PTCS Duct Sealing form
Choose Site	Start a Prescriptive Duct Sealing form
Create New Site / Verify Site Info	Start an Air-Source Heat Pump form
Site Details	* Maximum # of Heat Pump measures in the status of 'Pending' or 'Accepted'
Funding Program	Start a Ground-Source (Water to Air) Heat Pump form
Site Complete	* Maximum # of Heat Pump measures in the status of 'Pending' or 'Accepted'
	Start a Ground-Source (Water to Water) Heat Pump form
	* Maximum # of Heat Pump measures in the status of 'Pending' or 'Accepted'
	<input type="button" value="Previous"/> <input type="button" value="Next"/>

**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.

Certificate Information	
Completed Date	<input type="text"/>
Site Data	
NEW HEAT PUMP DATA	
AHRI Number	<input type="text"/>
SEER	<input type="text"/>
HSPF	<input type="text"/>
EER	<input type="text"/>
UNIT INFORMATION	
Make	<input type="text"/>
Model	<input type="text"/>
Capacity (Tons)	<input type="text"/>
INDOOR UNIT	
Model	<input type="text"/>
VALIDATE SYSTEM	
Heat Pump Stage(s)	<input type="text" value="1"/> ▼
Balance Point	<input type="text"/> <small>Provide BP documentation to utility.</small>

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).

Airflow Test	
Did you perform all tests in Test Only/Check Charge mode?	<input type="text"/>
Return Static Pressure	<input type="text"/>
Supply Static Pressure	<input type="text"/>
External Static Pressure	<input type="text"/> ?
Test measured in	<input type="text"/> Use same units for TrueFlow test.

TrueFlow Test	
TrueFlow Test Steps	
NSOP	<input type="text"/>
Plate Size	<input type="text"/>
Plate Location	<input type="text"/>
TFSOP	<input type="text"/>
Plate Pressure	<input type="text"/>
Calculated CFM per Ton	

Refrigerant Charge Check	
Outside Air Temp (F)	<input type="text"/>
Mode Tested	<input type="text" value="Heating"/>
Supply Temp	<input type="text"/>
Return Temp	<input type="text"/>
Calculated Temperature Split	

Controls Setup	
Is the low ambient lockout control (LAL) set to 5 degrees or less?	<input type="text"/>
Auxiliary (strip) heat lockout has been set to:	<input type="text"/>
Indoor Thermostat Make	<input type="text"/>
Indoor Thermostat Model	<input type="text"/>
Is this a Multiple Capacity Compressor System?	<input type="text"/>



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.

Certificate Information	
Completed Date:	<input type="text"/>
Percent of ducts in conditioned space:	<input type="text"/>
Duct Sealing Data	
Type of ducts sealed:	<input type="text"/>
Is this information provided for Record Only?	<input type="text"/>
What type of equipment did you use?	<input type="text"/>
# of Supplies	<input type="text"/>
# of Returns	<input type="text"/>
Duct Insulation	<input type="text"/>
HOUSE PRESSURIZATION	
House Pressurization:	<input type="radio"/> 50 Pa <input type="radio"/> Other: <input type="text"/>
<u>Notes on Testing</u>	
Duct Leakage Test: Duct blaster CFM reading with duct pressure at 0Pa with respect to house and Blower Door @ +50Pa.	
Duct Blaster Fan Pressure: This is not the house pressure. Example: Ring 1, 78Pa Fan Pressure, 364 CFM)	
PRE-TEST	
Pre-Test Leakage Requirements	
Pre-Test Ring:	<input type="text"/>
Pre-Test Fan Pressure:	<input type="text"/> (Pa) *
Pre-Test Flow:	<input type="text"/> (CFM ₅₀) *
POST-TEST	
Post-Test Leakage Requirements	
Post-Test Ring:	<input type="text"/>
Post-Test Fan Pressure:	<input type="text"/> (Pa) *
Post-Test Flow:	<input type="text"/> (CFM ₅₀) *
Duct Blaster Location:	<input type="text"/>
Pressure Tap Location:	<input type="text"/>
Specification Requirements	
The duct sealing at this site meets program requirements including: repairs metal ducts secured with screws, flex duct interior and exterior liners secured with nylon straps or steel band clamps, ducts are supported and off the ground, boots are mechanically fastened to floor/ceiling, plenum, main ducts, takeoffs and boots sealed, and a good faith effort was made to remove existing duct tape and cover with mastic.	
<input type="text"/>	
CAZ Test	
Is there a combustion appliance zone?	<input type="text"/> ?
Is a CO detector installed?	<input type="text"/>



Measure Details: Prescriptive Duct Sealing

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

Certificate Information	
Completed Date	<input type="text"/>
Type of ducts sealed	<input type="text" value="v"/> *
Qualifying Characteristic	<input type="text" value="v"/> *
# of Supplies	<input type="text"/> *
# of Returns	<input type="text"/> *
Duct Repair	
Select all issues repaired:	<input type="checkbox"/> No repairs done - or - <input type="checkbox"/> Large gaps in sheet metal <input type="checkbox"/> Rusted portions <input type="checkbox"/> Missing sections
Metal Ducts:	<input type="text" value="v"/> *
Flex Duct Connections:	<input type="text" value="v"/> *
Flex Duct Liners:	<input type="text" value="v"/> *
Duct Support and Connections	
Duct Support	<input type="text" value="v"/> *
Ground Contact	<input type="text" value="v"/> *
Boots are mechanically fastened to the subfloor	<input type="text" value="v"/> *
Duct Sealing	
<u>All accessible portions of the duct which require sealing are sealed with approved materials.</u> This includes pulling insulation off, where opportunities exist. Examples of opportunities: Plenum; Air-handler cabinet to plenum; Plenum-to-take-off connections; Finger/dovetail joints; Branch T's, Y's and L's; Duct-to-duct connections; and Gores on adjustable elbows.	
Are all ducts properly sealed?	<input type="text" value="v"/> *
Return was	<input type="text" value="v"/> *
Duct Insulation	<input type="text" value="v"/> *
CAZ Test	
Is there a combustion appliance zone?	<input type="text" value="v"/> ?
Is a CO detector installed?	<input type="text" value="v"/> *



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.

Certificate Information

Completed Date

Site Data

NEW HEAT PUMP DATA

Loop Type Open
 Closed

AHRI Number

COP

UNIT INFORMATION

Make

Model

Capacity (Tons)

VALIDATE SYSTEM

Heat Pump Stage(s) ▼

Balance Point Provide BP documentation to utility.

Airflow Test

Did you perform all tests in Test Only/Check Charge mode? ▼

Return Static Pressure

Supply Static Pressure

External Static Pressure ?

Test measured in ▼ Use same units for TrueFlow test.

TrueFlow Test

TrueFlow Test Steps

NSOP

Plate Size ▼

Plate Location ▼

TFSOP

Plate Pressure

Calculated CFM per Ton

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.

Certificate Information	
Completed Date	<input type="text"/>
Site Data	
NEW HEAT PUMP DATA	
Loop Type	<input checked="" type="radio"/> Open <input type="radio"/> Closed
AHRI Number	<input type="text"/>
COP	<input type="text"/>
UNIT INFORMATION	
Make	<input type="text"/>
Model	<input type="text"/>
Capacity (Tons)	<input type="text"/>
VALIDATE SYSTEM	
Heat Pump Stage(s)	<input type="text"/> <input type="button" value="v"/>
Balance Point	<input type="text"/> <small>Provide BP documentation to utility.</small>

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.

Required Acknowledgement

By checking one box below, the PTCS certified technician or administrator entering data on behalf of the certified technician acknowledges the following:

- 1) This project and any accompanying documentation are complete and accurate.
- 2) This project may be selected for a Quality Assurance (QA) inspection and any necessary remediation will be addressed in the required timeframe.

Certified Technician: I certified the project and it meets program specifications.

I am an administrator entering on behalf of the Certified Technician.

Clicking 'Finish' will begin the validation process to determine if the data meets the PTCS specification. A status and any relevant details will appear on the next screen. By clicking 'Save Progress', no validation will be performed and entered data will be saved to allow for later completion.

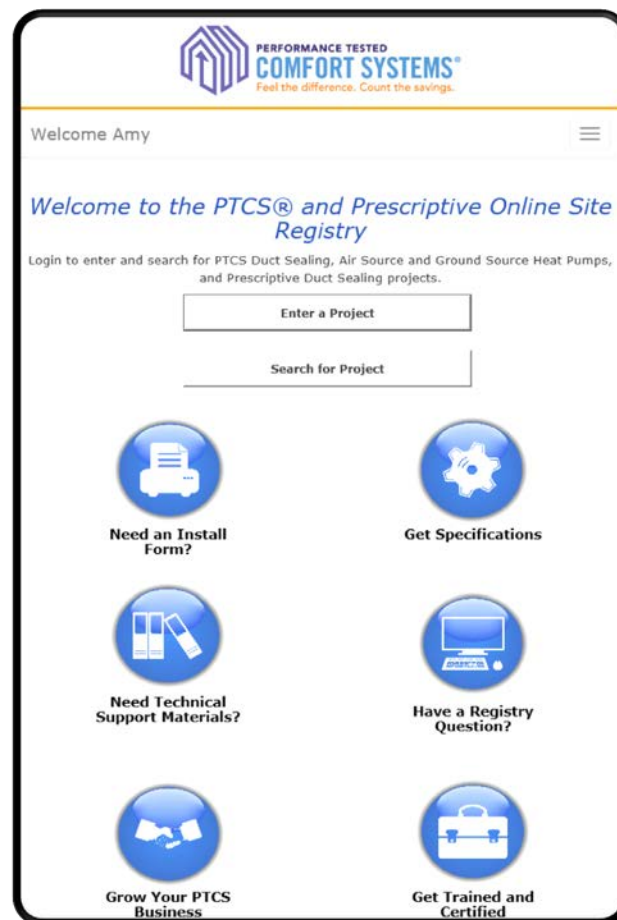
Saving Entry Progress

- ▶ 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"



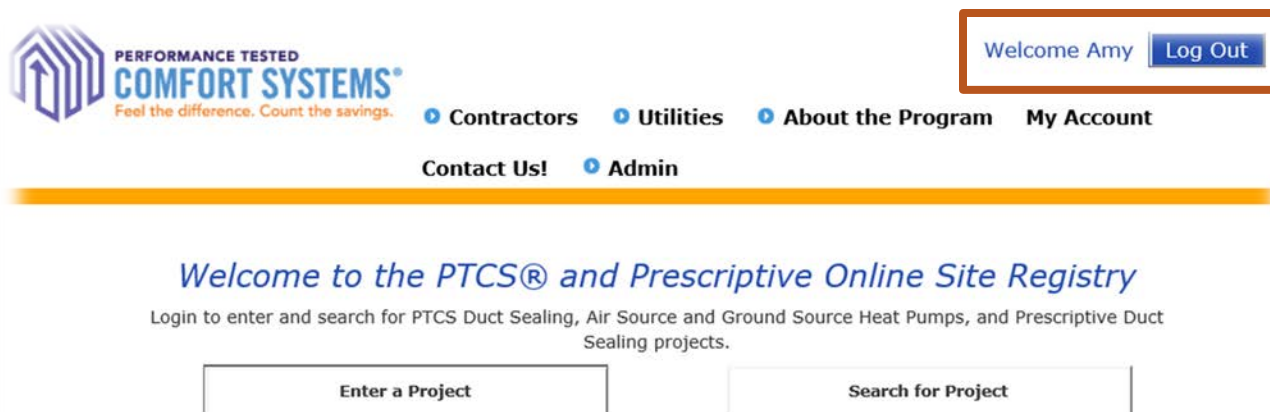
Enter on a Mobile Device

- ▶ 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...



The screenshot shows the top navigation bar of the Performance Tested Comfort Systems website. On the left is the logo with the tagline "Feel the difference. Count the savings." To the right of the logo are navigation links: "Contractors", "Utilities", "About the Program", and "My Account". Below these are "Contact Us!" and "Admin". In the top right corner, a user is logged in as "Amy", with a "Log Out" button next to it. Below the navigation bar is a yellow horizontal bar. The main content area features the heading "Welcome to the PTCS® and Prescriptive Online Site Registry" and a sub-heading "Login to enter and search for PTCS Duct Sealing, Air Source and Ground Source Heat Pumps, and Prescriptive Duct Sealing projects." At the bottom of this section are two buttons: "Enter a Project" and "Search for Project".

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.

Measure Installed:	between <input type="text"/>	and <input type="text"/>
Measure Entered:	between <input type="text"/>	and <input type="text"/>
Measure ID:	<input type="text"/>	
Status:	Accepted Audit BPA Approved BPA Pending	
<i>select or deselect items)</i>		
Address:	<input type="text" value="Test"/>	<i>*To broaden results, omit directional words (i.e. NW, Southwest) or street types (i.e. Rd, Street)</i>
Address Line 2:	<input type="text"/>	
City:	<input type="text"/>	
Tech ID:	(Search All) ▼	
Company Name:	(Search All) ▼	
Measure Type:	(Search All) ▼	
Utility:	Albion, City of Alder Mutual Light Company APS (Arizona Power Supply) Ashland, City of Asotin County PUD No. 1	
<i>select or deselect items)</i>		

Find the Registry Installation Report

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

Measure ID	Measure Type	Entered
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

Electricity

Utility: 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

Thank
you

