

Heat Pump HVAC Post-Install & Maintenance Checklist

Follow the recommendations below to get the most out of your system and improve your home's energy efficiency. Detailed instructions can be found at: [**BayREN.org/post-install**](https://www.bayren.org/post-install).

Immediately After Installation

- ☐ **In your PG&E account, switch to an electric rate plan and enroll in a new baseline allowance for space heating** that maximizes your savings. For guidance, review the *Shift to a PG&E Rate Plan That Supports Electrification* section at [**BayREN.org/post-install**](https://www.bayren.org/post-install).
- ☐ **Set up your appliance control features** through a smart thermostat or dedicated app. Your heat pump most likely can connect to Wi-Fi, allowing you to install a smart thermostat. With a smart thermostat, you can easily keep track of your energy usage and even qualify for potential rebates through PG&E.
- ☐ **Optimize your Heat Pump HVAC settings** to ensure you are using your system efficiently and get the most bang for your buck!



Scan this QR code for detailed instructions to maximize your appliance.

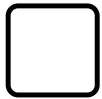
Or, visit our webpage at [**BayREN.org/post-install**](https://www.bayren.org/post-install).

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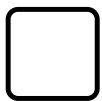
Ongoing Maintenance

Review your model's manual for specific instructions. The content below serves as a general checklist and reminder.

Every 1 to 3 Months

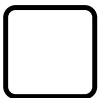


Change the HVAC air filter. Follow the manufacturer's recommendations for how often you clean and change the filter or change as needed.



Ensure air flow. Keep shrubs and plants two feet away from the outdoor unit to prevent restricted air flow. Keep it uncovered.

Annually



Schedule a service call. An HVAC technician will complete a thorough inspection and make sure everything is working properly.

Optimizing Your Heat Pump HVAC Settings

Heat pumps work most efficiently when they run steadily, rather than frequently turning them on and off. By using the right settings, you can improve comfort, reduce energy use, and lower operating costs.

- **Avoid Auto** mode when possible, to prevent unnecessary switching between heating and cooling. Instead, **use Heat mode during colder months and Cool mode during warmer months.**
- **During winter,** maintain a consistent temperature rather than frequently adjusting the thermostat. Setting the temperature higher than your desired comfort level can increase energy use without heating your home more quickly.
- **During summer,** use **Fan** mode for light air circulation. If you need more relief, use **Cool** mode to lower temperatures.
- If your home also has a furnace or boiler, **prioritize the heat pump** whenever possible to maximize savings.