



SAMPLE FORM – NOT VALID FOR SUBMISSION TO BUILDING DEPARTMENTS

CERTIFICATE OF INSTALLATION

Note: This table completed by HERS Registry.

Table with 2 columns: Field Name (Project Name, Dwelling Address, City and Zip Code) and Field Value (Enforcement Agency, Permit Number, Permit Application Date)

A. System Information

Each system requiring refrigerant charge verification will be documented on a separate certificate.

Table with 3 columns: ID (01-17), Description (Space Conditioning System Identification, Condenser info, Refrigerant Type, etc.), and Value



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MCH-25a - Refrigerant Charge Verification - Superheat Method

B. Metering Device Verification

Superheat Method can only be used on systems that do not have a variable metering device.

01	Refrigerant Metering Device	
02	Superheat Method Applicability Status	

C. Instrument Calibration

Procedures for instrument calibration are given in Reference Residential Appendix RA3.2.2 and RA3.2.2.2.

01	Date of Digital Refrigerant Gauge Calibration	
02	Date of Digital Thermocouple Calibration	
03	Digital Refrigerant Gauge Calibration Status	
04	Digital Thermocouple Calibration Status	

D. Measurement Access Hole (MAH) Verification

Procedures for installing MAH are specified in Reference Residential Appendix RA3.2.2.3.

01	Method Used to Demonstrate Compliance with the Measurement Access Hole (MAH) Requirement	
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E. Minimum System Airflow Rate Verification

Procedures for verifying minimum system airflow are specified in Reference Residential Appendix RA3.3.3.

01	02	03
Indoor Unit Name or Description of Area Served	Minimum Required System Airflow Rate (cfm)	System Airflow Rate Verification Status

04 Compliance Statement:

Notes:



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F. Data Collection

Procedures for determining Refrigerant Charge using the Standard Charge Verification Procedure are given in Reference Residential Appendix RA3.2.2 and RA3.2.2.2.

01	Lowest Return Air Dry-bulb Temperature that Occurred During the Refrigerant Charge Verification Procedure (°F)	
02	Measured Condenser Air Entering Dry-bulb Temperature ($T_{condenser, db}$) (°F)	
03	Outdoor Temperature Qualification Status	
04	Measured Return (evaporator entering) Air Dry-bulb Temperature ($T_{return, db}$) (°F)	
05	Measured Return (evaporator entering) Air Wet-bulb Temperature ($T_{return, wb}$) (°F)	
06	Measured Suction Line Temperature ($T_{suction}$) (°F)	
07	Measured Suction Line Pressure ($P_{suction}$ - psig)	
08	Evaporator Saturation Temperature ($T_{evaporator, sat}$) from Digital Gauge or P-T Table using Line F07 (°F)	
09	Measured Superheat (Line F06 – Line F08) (°F)	
10	Target Superheat (from Table RA3.2-2, using F02 and F05) (°F)	
11	Compliance Statement:	

MCH-25d - Refrigerant Charge Verification -Fault Indicator Display (FID)

G. Fault Indicator Display

Procedures for the Fault Indicator Display Verification are detailed in RA3.4.2.

01	FID Manufacturer Name/Make	
02	FID Model Number	
03	The display module is mounted adjacent to the system thermostat.	
04	The manufacturer has certified to the Energy Commission that the FID model meets the requirements of Reference Joint Appendix JA6 (make and model found on CEC list of approved FID devices).	
05	The system has operated for at least 15 minutes and the FID reports that the system is operating within acceptable parameters.	



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H. Fault Indicator Display – Additional Requirements

The responsible person’s signature on this compliance document affirms that all applicable requirements in this table have been met.

01	Fault Indicator Display devices shall either be factory installed by the space-conditioning system manufacturer, or field installed according to the space-conditioning system manufacturer's requirements and the FID manufacturer's specifications.
02	The installer shall ensure that a copy of the FID manufacturer's user instructions documentation has been made available to the building owner.

For information and data collection only. Not valid until registered with a HERS provider



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DOCUMENTATION AUTHOR'S DECLARATION STATEMENT

1. I certify that this Certificate of Installation documentation is accurate and complete.

Documentation Author Name:	Documentation Author Signature:
Documentation Author Company Name:	Date Signed:
Address:	CEA/HERS Certification Identification (If applicable):
City/State/Zip:	Phone:

RESPONSIBLE PERSON'S DECLARATION STATEMENT

2. I certify the following under penalty of perjury, under the laws of the State of California:
 1. The information provided on this certificate of installation is true and correct.
 2. I am either: a) a responsible person eligible under division 3 of the business and professions code in the applicable classification to accept responsibility for the system design, construction, or installation of features, materials, components, or manufactured devices for the scope of work identified on this certificate of installation, and attest to the declarations in this statement, or b) I am an authorized representative of the responsible person and attest to the declarations in this statement on the responsible person's behalf.
 3. The constructed or installed features, materials, components or manufactured devices (the installation) identified on this certificate of installation conforms to all applicable codes and regulations and the installation conforms to the requirements given on the certificate of compliance, plans, and specifications approved by the enforcement agency.
 4. I understand that a HERS rater will check the installation to verify compliance and if such checking determines the installation fails to comply, I am required to offer any necessary corrective action at no charge to the building owner.
 5. I understand that a registered copy of this certificate of installation shall be posted or made available with the building permit(s) issued for the building and made available to the enforcement agency for all applicable inspections, and I will take the necessary steps to ensure this requirement is accomplished.
 6. I understand that a registered copy of this certificate of installation is required to be included with the documentation the builder provides to the building owner at occupancy, and I will take the necessary steps to ensure this requirement is accomplished.

Responsible Builder/Installer Name:	Responsible Builder/Installer Signature:	
Company Name: (Installing Subcontractor or General Contractor or Builder/Owner)	Position With Company (Title):	
Address:	CSLB License:	
City/State/Zip:	Phone	Date Signed:
Third Party Quality Control Program (TPQCP) Status:	Name of TPQCP (if applicable):	

For assistance or questions regarding the Energy Standards, contact the Energy Hotline at: 1-800-772-3300

CERTIFICATE OF INSTALLATION – USER INSTRUCTIONS	LMCI-MCH-25-H
Refrigerant Charge Verification	(Page 1 of 4)

LMCI-MCH-25a-H User Instructions

Section A. System Information

1. This information is automatically pulled from the Certificate of Installation (MCH-01).
2. This information is automatically pulled from the Certificate of Installation (MCH-01)
3. This information is automatically pulled from the Certificate of Installation (MCH-01).
4. This information is automatically pulled from the Certificate of Installation (MCH-01)
5. This information is automatically pulled from the Certificate of Installation (MCH-01).
6. This information is automatically pulled from the Certificate of Installation (MCH-01)
7. Choose the type of refrigerant used by the system being verified. R-22 and R-410A are the most common, but other types may occasionally be encountered.
8. If “Other” is chosen in A07, then indicate the type of refrigerant being used. If R-22 or R-410A is being used (regardless of trade name, Puron, Genetron, etc.) it should be indicated in A07. This row is only for refrigerants other than R-22 and R-410a. Documentation of refrigerant may be requested.
9. If applicable, a liquid line filter drier shall be installed according to manufacturer’s specifications.
10. Indicate whether the HVAC system is Completely New, Replacement or an Alteration. These are defined in detail the Residential Compliance Manual.
11. Select the appropriate choice regarding whether this system has a Fault Indicator Display (FID). Qualifying FID’s may exempt a system from HERS refrigerant charge verification. FID’s are described in Joint Appendix JA6.1. Qualifying FID’s must appear on a list of approved devices kept by the Commission. Installation of a FID does not exempt the installer from proper refrigerant charge verification. It may only exempt the need for third party refrigerant charge verification. Third party verification of the FID is required. Other requirements may also be triggered.
12. Most ducted split systems and package systems are of the type that minimum airflow can be verified using an approved measurement procedure. Examples of systems that do not meet this description are ductless systems. Selecting “No” here may subject the project to additional scrutiny by enforcement personnel.
13. Most ducted split systems and package systems are of the type that approved refrigerant charge verification procedures detailed in Residential Appendix RA3.2.2 or RA1 can be used (i.e., Standard Charge Verification or Winter Setup Verification procedures). Examples of systems that may not meet this description are “mini splits” or variable refrigerant flow systems that may only be charged using weigh-in procedures. Selecting “No” here may subject the project to additional scrutiny.
14. Specify the date the refrigerant charge verification was performed by the installer.
15. Select the refrigerant charge verification method used from the choices provided:
 - Superheat (outdoor temperature must be $\geq 55^{\circ}\text{F}$); this verification method can only be used when the outdoor temperature is at or above 55°F . It is only used on systems with fixed orifice refrigerant metering devices (non-variable metering devices). This method is detailed in Reference Appendix RA3.2.2.6.1. Systems verified using this method may be eligible for HERS verification compliance using Group Sampling. Choosing this option will generate a LMCI-MCH-25a.
 - Subcooling (outdoor temperature must be $\geq 55^{\circ}\text{F}$); this verification method can only be used when the outdoor temperature is at or above 55°F . It is only used on systems with variable metering devices (TXV or EXV). This method is detailed in Reference Appendix RA3.2.2.6.2. Systems verified using this method may be eligible for HERS verification compliance using Group Sampling. Choosing this option will generate a LMCI-MCH-25b.

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- Weigh-in; this verification method can be used at any outdoor temperature allowed by the equipment manufacturer. This method is detailed in Reference Appendix RA3.2.3. Systems verified using this method are NOT eligible for HERS verification compliance using Group Sampling. Choosing this option will generate a LMCI-MCH-25c.
 - Winter Setup (applicable when outdoor temperature is < 55°F); the Winter Setup verification method is a special version of the Subcooling method. It can be used when the outdoor temperature is between 37° and 55°F. It can only be used on equipment where the manufacturer has specifically approved it for the equipment being tested. The Winter Setup procedure is details in Residential Appendix RA1.2. Choosing this option will generate a LMCI-MCH-25e.
 - New Package Unit Factory Charge; Choose this option when a new package unit is being installed that has an AHRI rating. This helps ensure that the unit was properly charged at the factory. HERS verification of refrigerant charge may not be required in this case. Choosing this option will generate a LMCI-MCH-25f.
16. Identify who will be performing the verification that is documented on this Certificate of Installation, select from the two options. Note that HERS verification compliance by Group Sampling requires that the installer perform their own refrigerant charge verification as part of the installation of the equipment prior to the system being put into a sample group for possible selection by a HERS rater for verification. If Group Sampling is not intended, the HERS Rater may perform the refrigerant charge verification on behalf of the Installing Contractor (applies to any method but Weigh-In) and the Rater will enter same results on both the LMCI and LMCV.
17. The Group Sampling status is automatically displayed based on the input results of A15 and A16. Group Sampling procedures are detailed Residential Appendix RA2.3.

Section B. Metering Device Verification

1. Select the correct metering device used on the system being verified. This will check against the refrigerant charge verification method selected in A15. An error message will appear in B02 if the wrong verification method has been selected. Superheat verification can only be used on systems with fixed orifice and Subcool verification can only be used on systems with variable metering devices (TXV or EXV).
2. An error message here indicates that the wrong verification method may have been selected. Superheat verification can only be used on systems with fixed orifice and Subcool verification can only be used on systems with variable metering devices (TXV or EXV).

Section C. Instrument Calibration

1. Enter the date of most recent Digital Refrigerant Gauge Calibration Field Check. Analog gauges are not allowed for verification purposes under the 2022 Standards. Specification for pressure gauges is found in Residential Appendix RA3.2.2.2.3. Procedures for the field check procedure are detailed in RA3.2.2.4.2. Calibration field check must happen at least once every 30 days.
2. Enter the date of the most recent Digital Thermocouple Calibration. Specifications for thermocouples and temperature sensors can be found in Residential Appendix RA3.2.2.2.2. Procedures for calibration are detailed in RA3.2.2.4.1. Calibration must happen at least once every 30 days.
3. Digital Refrigerant Gauge Calibration status will appear automatically. If the date entered in C01 is more than 30 days prior to date of verification this row will indicate that calibration is required and you will not be allowed to continue filling out this document until calibration is performed.

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- Digital Thermocouple Calibration status will appear automatically. If the date entered in C02 is more than 30 days prior to date of verification this row will indicate that calibration is required and you will not be allowed to continue filling out this document until calibration is performed.

Section D. Measurement Access Hole (MAH) Verification

- Indicate the method used to demonstrate compliance with the MAH requirement by selecting the appropriate method from the drop down list. Procedures for installing MAH's are detailed in RA3.2.2.3. Selecting that the MAH cannot be installed consistent with Figure 3.2-1 may result in additional scrutiny by enforcement personnel.

Section E. Minimum System Airflow Rate Verification

- This information is automatically calculated based on the information given in A10. This is the target minimum system airflow required for the system being verified.
- This information is automatically calculated based on the MCH-23 or MCH-28, which documents the measured airflow (or alternative method) of the system being verified. If the measured airflow is not adequate it will not comply with the airflow requirements and refrigerant charge verification cannot be performed until the airflow meets the requirement.

Section F. Superheat Charge Verification Method – Data Collection

- Measure and record the lowest return air dry-bulb temperature that occurred during the refrigerant charge procedure in degrees F. This temperature must remain above 70°F during the verification procedure. This requirement is detailed in Residential Appendix RA3.2.2.5.
- Measure and record the condenser air dry-bulb temperature ($T_{\text{condenser}}$) in degrees F. This value is used to determine the target superheat from table RA3.2-2. This value must be at least 55°F and no more than 115°F to use the Superheat Charge Verification Method.
- If a value less than 55°F or greater than 115°F is entered in F02 the Superheat Method cannot be used.
- Measure and record the return air dry-bulb temperature ($T_{\text{return,db}}$) in °F. This measurement is taken at the MAH (or alternate location specified in F01. This procedure is detailed in RA3.2.2.5.
- Measure and record the return air wet-bulb temperature ($T_{\text{return,wb}}$) in °F. This measurement is taken at the MAH (or alternate location specified in F01. This procedure is detailed in RA3.2.2.5. This value is used to determine the target superheat from table RA3.2-2.
- Measure and record the suction line temperature (T_{suction}) in °F. This procedure is detailed in RA3.2.2.5. This value is used to calculate the measured superheat.
- Measure and record the suction line pressure (P_{suction}) in psig. This procedure is detailed in RA3.2.2.5. This value is used to determine the evaporator saturation temperature ($T_{\text{evaporator,sat}}$) from a pressure temperature chart for the appropriate refrigerant (can be internal to a digital gauge), which is entered into F08.
- Enter the evaporator saturation temperature ($T_{\text{evaporator,sat}}$) from the digital gauge or a separate pressure-temperature chart that corresponds to the suction line pressure entered in F07, in °F.
- Measured superheat is automatically calculated as the difference between the suction line temperature (F06) and the evaporator saturation temperature (F08)
- Enter target superheat from Table RA3.2-2. This table requires values for the condenser air dry-bulb temperature (F02) and the return air wet-bulb temperature (F05)
- System passes superheat method when F10 is within plus or minus 5°F of F09.

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Section G. Verification of Fault Indicator Display

1. Enter the manufacturer name or make of the approved Fault Indicator Display. Must match name shown on the list of approved devices kept by the Commission.
2. Enter the manufacturer model number of the approved Fault Indicator Display. Must match name shown on the list of approved devices kept by the Commission.
3. The installer must confirm that the FID display module is mounted adjacent to thermostat that controls the system being verified. This requirement is detailed in Residential Appendix RA3.4.2.
4. The installer must confirm that the installed FID is approved and appears the list of approved devices kept by the Commission. This requirement is detailed in Residential Appendix RA3.4.2.
5. The installer must confirm that the system has operated for at least 15 minutes and that they system is operating within acceptable parameters as specified by the FID and equipment manufacturers. This requirement is detailed in Residential Appendix RA3.4.2.

Section H. Indicator Display – Additional Requirements

1. Additional requirements are items that must be done, but are not specifically required to be checked by the HERS rater. By signing the Declaration Statement on this document, the installer is declaring that all of these additional requirements have been met. The requirement for installing FIDs to manufacturer’s specifications (unless factory installed) can be found in Joint Appendix JA6.1.3.
2. Additional requirements are items that must be done, but are not specifically required to be checked by the HERS rater. By signing the Declaration Statement on this document, the installer is declaring that all of these additional requirements have been met. The requirement for providing manufacturer’s instructions and other documentation for FIDs can be found in Joint Appendix JA6.1.4.

Documentation Declaration Statements

1. The person who prepared the LMCI will sign and complete the fields for their name, company (if applicable), address, phone number, certification information (if applicable), date and signature.
2. The person who is assuming responsibility for the project being built to comply with Title 24, Part 6, will complete the fields for their name, company (if applicable), address, phone number, license number (if applicable), date and signature.