



## ATTACHMENT C: WARRANTY & O&M CHECKLIST

*This document is part of the Polar Breeze LLC Comprehensive Service Agreement. Completing all items ensures the Client has necessary documentation and knowledge to operate and maintain the HVAC system.*

### C.1 Equipment Warranty Registration

Polar Breeze LLC registers equipment with manufacturers for maximum warranty coverage. This is a service included with the Agreement, not a guarantee of warranty terms. The Installer must register all equipment warranties with manufacturers within 30 days of installation.

- ✓ Furnace / Air Handler warranty registered. Confirmation #: \_\_\_\_\_
- ✓ Condensing Unit / Heat Pump warranty registered. Confirmation #: \_\_\_\_\_
- ✓ Thermostat warranty registered (if applicable). Confirmation #: \_\_\_\_\_
- ✓ Polar Breeze has submitted registration for maximum manufacturer warranty coverage.
- Humidifier warranty registered (if applicable). Confirmation #: \_\_\_\_\_
- ERV/HRV warranty registered (if applicable). Confirmation #: \_\_\_\_\_
- Zone control system warranty registered (if applicable). Confirmation #: \_\_\_\_\_
- Extended warranty purchased (if applicable). Policy #: \_\_\_\_\_

### C.2 Warranty Documentation Delivery

- ✓ Manufacturer warranty certificates for all major equipment.
- ✓ Warranty registration confirmation receipts.
- ✓ Written summary of warranty terms, coverage, exclusions, and claim procedures.
- Extended warranty policy documents (if applicable).
- Labor warranty documentation from Installer (if separate).
- Performance Guarantee summary (Premium/Elite).
- Contact information for all warranty service providers.

### C.3 Operations & Maintenance Manual Delivery

- ✓ Manufacturer's operating manual for furnace / air handler.
- ✓ Manufacturer's operating manual for condensing unit / heat pump.
- ✓ Thermostat operating manual and programming guide.
- ✓ Filter specifications: size, type, MERV rating, replacement schedule.
- Humidifier / dehumidifier manual (if applicable).
- ERV/HRV manual (if applicable).
- Zone control system manual (if applicable).



- Complete maintenance schedule with tasks, frequencies, and responsibilities.
- Emergency shutdown procedures for all equipment.
- Troubleshooting guide for common issues.
- Energy-saving tips and recommended thermostat settings for Utah.

### C.4 Client Training Checklist

The Installer must train the Client on these topics. Client initials confirm training received.

| Topic                             | Description  | Client Initials |
|-----------------------------------|--|-----------------|
| <b>Thermostat Operation</b>       | Programming, mode selection, temperature setpoints, hold/vacation modes.                           | _____           |
| <b>Filter Replacement</b>         | Location, size, type, MERV rating, replacement procedure and frequency.                            | _____           |
| <b>System Modes</b>               | Heating, cooling, auto, fan-only. Emergency heat for heat pumps.                                   | _____           |
| <b>Register Adjustment</b>        | How to adjust dampers. Importance of keeping all registers open.                                   | _____           |
| <b>Return Air</b>                 | Keeping return grilles unobstructed. No furniture or curtains over returns.                        | _____           |
| <b>Maintenance Schedule</b>       | Annual professional maintenance AND airflow re-verification (not just filter swaps).               | _____           |
| <b>Maintenance-Guarantee Link</b> | Active maintenance plan keeps Performance Guarantee active. Dropping maintenance narrows coverage. | _____           |
| <b>Emergency Procedures</b>       | System shutdown, circuit breaker and gas valve locations.  | _____           |
| <b>Warranty &amp; Guarantee</b>   | Coverage overview, duration, claim procedures, and what voids the guarantee.                       | _____           |

### C.5 Recommended Annual Maintenance Schedule

Maintenance includes airflow re-verification (CFM at registers) — not just filter swaps. Active maintenance keeps the Performance Guarantee active.

| Task                           | Frequency         | Responsibility | Notes                                       |
|--------------------------------|-------------------|----------------|---|
| Filter replacement             | Every 1-3 months  | Client         | More often with pets or allergies           |
| Professional tune-up (cooling) | Annually — Spring | Licensed HVAC  | Coil cleaning, refrigerant check            |
| Professional tune-up (heating) | Annually — Fall   | Licensed HVAC  | Burner cleaning, safety checks              |
| Airflow re-verification (CFM)  | Annually          | Licensed HVAC  | Confirm register CFM matches design         |
| Condensate drain check         | Quarterly         | Client         | Verify clear; pour vinegar to prevent clogs |
| Outdoor unit cleaning          | Annually — Spring | Client         | Remove debris, wash coil                    |
| Thermostat battery             | Annually          | Client         | If applicable                               |
| Duct inspection                | Every 2 years     | Licensed HVAC  | Check for disconnections, damage            |
| Register/grille cleaning       | Quarterly         | Client         | Vacuum to remove dust                       |

### C.6 Rebate & Tax Credit Documentation



Polar Breeze provides documentation to support federal tax credits and utility rebates. Approval is at the discretion of the applicable agency or utility.

- Documentation provided for Federal IRA tax credit application (heat pumps up to \$2,000/yr, AC up to \$600/yr).
- Documentation provided for Rocky Mountain Power Wattsmart rebate application.
- Documentation provided for Enbridge Gas ThermWise rebate application.
- Manual J/D/T reports provided for all applicable programs.
- Equipment specifications and efficiency ratings documented.

**C.7 Checklist Completion Certification**

By signing below, Installer and Client confirm all applicable items are completed, documentation delivered, and training provided.

**INSTALLER:**

Signature: \_\_\_\_\_

Printed Name: \_\_\_\_\_

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

**CLIENT:**

Signature: \_\_\_\_\_

Printed Name: \_\_\_\_\_

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

**POLAR BREEZE LLC (if applicable):**

Signature: \_\_\_\_\_

Printed Name: \_\_\_\_\_

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