



Home Visit Checklist

Revised: 3/26/2024

Coach: _____ Client: _____ Date: _____

- Client-identified needs and priorities have been documented.
 - HVAC Water heating Appliances _____
 - Transportation Solar Other _____
- Existing home cooling and heating systems are documented:
 - H type _____ H fuel _____, H brand _____,
 - H size _____, H age _____, H condition _____, H duct coverage _____.
 - C type _____ C fuel _____, C brand _____,
 - C size _____, C age _____, C condition _____, C duct coverage _____.
 - HVAC details:

- Water heater: fuel _____, age _____, location _____.
- Client has been informed of questions to ask potential installation contractors.
- Client understands best types of solutions to meet needs.
- If client wants specialized coaching, what expertise is needed? _____.
- Client is aware of TEP's free home energy assessment and how to obtain an energy audit.
- Client has received information about utility, state and federal incentives that may apply to future work in their home.
- If client is interested in solar, coach has a photo of main electric service panel (next to elec. meter) with its door opened. Main Breaker size _____ Amps.
- Client has been invited to request further coaching if needed to compare quotes and/or get ideas on how to follow up on a quote (e.g., questions to ask).