

Mini split quote comparison checklist

For a San Diego-area home or small business with more than one mini split quote on the table. Mark each line against each quote: stated, missing or unclear. Keep the finished sheet with the equipment manuals.

Sizing, rooms and equipment

Two quotes can carry the same total and cover very different systems. Put each quote next to these lines and mark what it states, what it leaves out and what it leaves vague.

- ☐ Whether the size of each indoor head comes from a room-by-room load calculation (Manual J), or from square footage alone.
- ☐ Which rooms get a head, and the capacity of each one. Open rooms may share a head; closed bedrooms usually do not.
- ☐ One multi-zone outdoor unit or several single-zone systems, and why that choice fits the rooms.
- ☐ The make, model numbers and refrigerant of the outdoor unit and every indoor head, so the quotes can be compared like for like.
- ☐ The indoor unit style for each room: wall head, ceiling cassette, concealed duct or floor console.
- ☐ For a coastal property, whether the outdoor unit has a factory anti-corrosion coil treatment, and where it sits relative to salt spray.
- ☐ The controls included: handheld remotes, wall controllers or Wi-Fi adapters.

Line sets, drains, power and the outdoor unit

Most of the difference between quotes is in how the equipment is connected, not in the equipment itself.

- ☐ Where the outdoor unit goes, what it sits on (pad, wall bracket or roof stand) and how far it is from the property line.
- ☐ The line set route from each head to the outdoor unit, and whether the lines are covered outside with line-hide or left exposed.
- ☐ Where each head drains: by gravity to the outside, or through a condensate pump, and where the pump drains to.
- ☐ The electrical work: a new circuit and disconnect, who performs it, and whether the panel has room. A panel upgrade should appear as its own line, not hidden in the total.
- ☐ Wall, ceiling and stucco patching around penetrations: included, excluded or left to the owner.
- ☐ The commissioning steps written into the scope: nitrogen pressure test, evacuation checked with a micron gauge, charge set to the manufacturer's specifications, and a test run in cooling and heating.

Permits, inspections and approvals

A mini split installation needs a permit in the City of San Diego, the unincorporated County and the other cities in the region. These lines show who carries each step.

- ☐ Which agency issues the permit for the address: the City of San Diego, the County (unincorporated areas) or another city, and who applies for it.
- ☐ Whether the permit fee is in the quote or billed separately.
- ☐ Who is present for the inspection, and whether a final inspection is part of the job before payment is complete.
- ☐ Whether the Energy Code calls for refrigerant charge verification on this job, and who arranges it.
- ☐ For a historically designated property, a coastal bluff lot or a home in a condominium or HOA, which extra review applies and who handles it.
- ☐ The contractor's California license number and classification (C-20 for HVAC), so it can be checked with the Contractors State License Board.

License lookup: Contractors State License Board, cslb.ca.gov. Permits: the building department for the address (City of San Diego Development Services, County of San Diego Planning & Development Services, or the city).

Warranty and records at closeout

These are the papers you need when a part fails, the home is sold or the equipment needs service. A quote that names them is easier to hold to.

- ☐ The manufacturer's equipment warranty terms, and who registers the equipment with the manufacturer.
- ☐ The contractor's labor warranty, in writing, and how long it lasts.
- ☐ The permit number and the passed final inspection.
- ☐ The commissioning record: pressure test, vacuum reading and refrigerant charge.
- ☐ Model and serial numbers for every unit, and the owner's manuals.
- ☐ How filter cleaning works and how often the system should be serviced.

What to record before you request bids

Give every contractor the same starting facts, so the quotes answer the same question. Fill this in before the first site visit.

Property address and ZIP code

Home type: single-family, townhome, condo, ADU or commercial space

Year built; current heating (wall furnace, baseboard, none)

Rooms you want cooled or heated, and which rooms run hottest

Where an outdoor unit could go; any HOA rules you know of

Electrical panel location and whether it has open breaker spaces

Attic or crawlspace access above or below those rooms

Historic designation or coastal bluff lot

When you need the system running

This checklist is general information, not a load calculation, an inspection or legal advice. Permit rules and fees are set by each building department and can change; associations and insurers set their own requirements. Never open an outdoor unit or an electrical disconnect; if a unit smells of burning or water reaches a ceiling or outlet, switch the system off at the breaker and call for service.