



Caseta Homeowner Training Checklist

A homeowner's enjoyment of the system is directly related to their understanding of how the system operates. This checklist is intended to provide reminders while training homeowners on how to use their system. Please review each of these items with the homeowner while on-site.

☐ **Lutron Caseta Mobile Application**

Instruct the end user how to use their Lutron Caseta app, including the following key features:

- ☐ Adding new devices
- ☐ Creating scenes
- ☐ Settings>Configure Homepage
- ☐ Creating/modifying schedules
- ☐ Voice Control configuration (Amazon Alexa, Apple HomeKit, etc.)
- ☐ Adding Sonos to scenes and configuring the Audio Pico (if necessary)
- ☐ Using the Caseta app with an Apple Watch (if necessary)
- ☐ Setup and explain Arriving/Leaving Home
- ☐ Setup and explain Smart Away
- ☐ Thermostat integration setup and functionality test (Nest, Homeywell, Ecobee, etc.)
- ☐ Provide customer with their credentials and review the following: changing password, forgot password, and changing email

☐ **Integration Devices**

Demonstrate the operation of the 3rd-party integration equipment.

☐ **Local control fail-safe operation**

Show the homeowner that local controls, dimmers, switches, and Pico remotes still function if the Caseta application is inoperative.

☐ **Air gap / FASS (Front Accessible Service Switch)**

Show the homeowner the operation of the air gap / FASS switch on the in-wall controls. Explain when to use it.

☐ **Lutron Caseta Help Menu**

Show the end user how to access and utilize the help menu of the Lutron Caseta mobile app, including how to submit help files to Lutron.

☐ **Purchasing LED bulbs**

Give the homeowner a brief explanation challenges involved with LED dimming. Show them the following online tool that can be used to find compatible LED bulbs. www.lutron.com/ledfinder