

HVAC inspection checklist

01 / Visit, equipment and authorized scope

For qualified technicians. Complete only authorized tasks using equipment instructions and site procedures. Record unsafe, inaccessible and untested items with their reason and follow-up.

1. Visit details

Customer / company

Work order / visit date

Property address / site contact / access arrangements

Technician / qualifications

Residential / commercial / visit type

2. System identification

Asset ID / unit location / zone

System type / operating mode

Manufacturer / model

Serial number / instruction reference

3. Safety, access and scope

Customer concern / authorized scope / hazard controls

Access limits / excluded tasks / required follow-up

Indoor & outdoor checks

02 / Shared inspection record for the covered asset

Result choices: Pass, Attention, Fail, Not tested or N/A. Select a result for each applicable row. Record units, conditions and the equipment reference with every measurement.

Asset ID / model / test conditions

CHECK / AUTHORIZED TASK	RESULT	READING / EVIDENCE / REFERENCE
Filter: type, dimensions, fit and condition	<div>Select</div>	<div></div>
Blower and accessible coil condition	<div>Select</div>	<div></div>
Condensate drain, pan and authorized safety checks	<div>Select</div>	<div></div>
Supply / return, visible ducts and insulation	<div>Select</div>	<div></div>
Thermostat, controls and installed ventilation	<div>Select</div>	<div></div>
Outdoor access, clearances, mounting and cabinet	<div>Select</div>	<div></div>
Outdoor coil, fan and refrigerant-line insulation	<div>Select</div>	<div></div>
Authorized operation: readings, mode and reference	<div>Select</div>	<div></div>

Findings & follow-up

03 / Evidence, action, review and closeout

7. Measurements and evidence

Measurement / value / unit / conditions

Asset / manufacturer reference / photo ID

Measurement / value / unit / conditions

Asset / manufacturer reference / photo ID

Measurement / value / unit / conditions

Asset / manufacturer reference / photo ID

8. Findings and action

Observed finding / result / evidence / priority

Recommended action / customer approval / follow-up owner / due date

Untested items / reason / next visit or action

Technician name / date

Customer acknowledgment / date

Gas furnace attachment

04 / Equipment attachment 1 of 4. Complete one copy per covered asset.

Use manufacturer procedures for the specific model. Unperformed checks receive Not tested with a reason. This record documents work and does not authorize hazardous tasks.

Asset / model / serial	Procedure / test conditions / technician	
<div></div>	<div></div>	

CHECK / AUTHORIZED TASK	RESULT	READING / EVIDENCE / REFERENCE
Gas connections: condition and authorized leak assessment	<div>Select</div>	<div></div>
Venting and combustion-air path	<div>Select</div>	<div></div>
Burner, ignition and flame-sensing condition	<div>Select</div>	<div></div>
Accessible heat-exchanger condition / inspection limits	<div>Select</div>	<div></div>
Authorized combustion readings and test conditions	<div>Select</div>	<div></div>
Safety controls / operating checks under procedure	<div>Select</div>	<div></div>
Findings / untested reason / evidence / escalation / next action		
<div></div>		
Technician review / date / follow-up owner		
<div></div>		

Electric furnace attachment

05 / Equipment attachment 2 of 4. Complete one copy per covered asset.

Use manufacturer procedures for the specific model. Unperformed checks receive Not tested with a reason. This record documents work and does not authorize hazardous tasks.

Asset / model / serial	Procedure / test conditions / technician	
<div></div>	<div></div>	

CHECK / AUTHORIZED TASK	RESULT	READING / EVIDENCE / REFERENCE
Heating-element and assembly condition	<div>Select</div>	<div></div>
Electrical connections / permitted voltage readings	<div>Select</div>	<div></div>
Current readings by stage under authorized procedure	<div>Select</div>	<div></div>
Sequencer, relay and thermostat operation	<div>Select</div>	<div></div>
Limit / safety-control checks under procedure	<div>Select</div>	<div></div>
Blower operation, airflow and temperature rise	<div>Select</div>	<div></div>
Findings / untested reason / evidence / escalation / next action		
<div></div>		
Technician review / date / follow-up owner		
<div></div>		

Heat pump attachment

06 / Equipment attachment 3 of 4. Complete one copy per covered asset.

Use manufacturer procedures for the specific model. Unperformed checks receive Not tested with a reason. This record documents work and does not authorize hazardous tasks.

Asset / model / serial

Procedure / test conditions / technician

CHECK / AUTHORIZED TASK

RESULT

READING / EVIDENCE / REFERENCE

Operating mode, outdoor conditions and equipment identity

Select

Outdoor coil, fan, cabinet and clearances

Select

Authorized heating / cooling performance readings

Select

Refrigerant assessment under applicable procedure

Select

Defrost controls and reversing-valve operation

Select

Auxiliary heat, staging and thermostat controls

Select

Findings / untested reason / evidence / escalation / next action

Technician review / date / follow-up owner

Ductless system attachment

07 / Equipment attachment 4 of 4. Complete one copy per covered asset.

Use manufacturer procedures for the specific model. Unperformed checks receive Not tested with a reason. This record documents work and does not authorize hazardous tasks.

Asset / model / serial	Procedure / test conditions / technician	
<div></div>	<div></div>	

CHECK / AUTHORIZED TASK	RESULT	READING / EVIDENCE / REFERENCE
Indoor head identity, zone and access	<div>Select</div>	<div></div>
Filter, accessible coil and blower condition	<div>Select</div>	<div></div>
Condensate pan, drain and pump where installed	<div>Select</div>	<div></div>
Controller, operating mode and zone response	<div>Select</div>	<div></div>
Outdoor unit, line insulation and connections	<div>Select</div>	<div></div>
Model-specific operating readings and reference	<div>Select</div>	<div></div>
Findings / untested reason / evidence / escalation / next action		
<div></div>		
Technician review / date / follow-up owner		
<div></div>		