



**ServiceTitan®**



# Company Name Here

## HVAC INSTALLATION CHECKLIST

**Inspection Date: (mm/dd/yyyy)**

The header features a blue background with a faint, stylized illustration of a person's face in profile, looking upwards. The text 'HVAC INSTALLATION Checklist' is prominently displayed in white.

# HVAC INSTALLATION

## Checklist

### HOW TO USE

These templates are designed to be customized to fit your specific business needs.

The checklist should be used by the technician to change out and/or installing new equipment.

### CUSTOMER AND TECHNICIAN INFORMATION

**Date:**

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**Job #:**

**Customer Name:**

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**Phone Number:**

**Customer Address:**

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**Technician Name:**

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**Existing Model/Serial Numbers:**

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**New Model/Serial Numbers:**

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## Checklist

<b>Installation Item:</b> <b>SPACE INSPECTION</b>	<b>Notes</b>
<input type="checkbox"/> Space is clean of debris and there's proper clearance to install.	
<input type="checkbox"/> Floor covering to protect carpet or hardwood floors.	
<input type="checkbox"/> Shoe booties to protect hardwood floors.	
<input type="checkbox"/> Ducts are insulated and sealed.	
<input type="checkbox"/> Refrigeration system checked for leaks.	
<input type="checkbox"/> Gas piping checked for leaks.	
<input type="checkbox"/> Drain line cleared.	
<b>Installation Item:</b> <b>PRE-INSTALLATION UNIT INSPECTION</b>	<b>Notes</b>
<input type="checkbox"/> Unit inspected for shipping damage.	
<input type="checkbox"/> Model number matches order.	
<input type="checkbox"/> All loose parts have been installed.	
<input type="checkbox"/> New filter in place (Filter information) _____	



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Installation Item: <b>ELECTRICAL AND CONTROLS</b>	Notes
<input type="checkbox"/> Main power wiring correct and matches NEC and local codes.	
<input type="checkbox"/> Unit has been properly grounded.	
<input type="checkbox"/> Electrical and control pipe chases have been sealed.	
<input type="checkbox"/> Terminal screws and wiring are connected and tight.	
<input type="checkbox"/> Field mounted controls and wiring is complete.	
<input type="checkbox"/> Fuses installed.	
<input type="checkbox"/> Temperature sensors installed.	
<input type="checkbox"/> Thermostat parameters are properly set.	

# HVAC INSTALLATION

## Checklist

<b>Installation Item:</b> <b>GAS REQUIREMENTS</b>	<b>Notes</b>
<input type="checkbox"/> Gas supply line connected to unit.	
<input type="checkbox"/> Gas piping joints sealed.	
<input type="checkbox"/> Drip leg installed.	
<input type="checkbox"/> Gas leak check complete.	
<input type="checkbox"/> Check gas pressure.	
<b>Installation Item:</b> <b>AIRFLOW FANS</b>	<b>Notes</b>
<input type="checkbox"/> Motor and blower mounting bolts are tight.	
<input type="checkbox"/> Fans are aligned and rotating freely.	
<input type="checkbox"/> Fan motor bearings are lubricated.	

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<b>Installation Item:</b> <b>COIL REQUIREMENTS</b>	<b>Notes</b>
<input type="checkbox"/> Water or steam connections and piping installed.	
<input type="checkbox"/> Penetration points sealed.	
<input type="checkbox"/> Water valve installed.	
<input type="checkbox"/> Valve wiring connected to unit control panel.	
<b>Installation Item:</b> <b>REFRIGERANT REQUIREMENTS</b>	<b>Notes</b>
<input type="checkbox"/> Components and piping properly installed.	
<input type="checkbox"/> Nitrogen purge while brazing.	
<input type="checkbox"/> Check for leaks.	

# HVAC INSTALLATION

## Checklist

### MEASUREMENTS

*Include any that are applicable*

#### HEATING

Inlet Gas Pressure:

Manifold Gas Pressure:

Supply Air Temp:

Return Air Temp:

Temp Rise:

#### REFRIGERATION

Suction Pressure:

Discharge Pressure:

Suction Temp:

Discharge Temp:

Refrigerant Charge (Actual):

(Rated):

Compressor Amps (Actual):

(Rated):



# HVAC INSTALLATION

## Checklist

### CUSTOMER COMMUNICATION

- ☐ Walkthrough of unit and features
- ☐ Thermostat Settings
- ☐ Warrenty Information
- ☐ Maintenance Agreements
- ☐ Review Request

### TECHNICIAN & CUSTOMER SIGNATURE

Technician Name:

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Technician Signature:

Date:

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Customer Name:

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Customer Signature:

Date:

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