

Maintenance Checklist



Customer Name:_____

Date:_____

Work Order #:_____

Preferred Number for Receiving Videos:_____

Allocated time (in minutes): Less than 60_____ 60-90_____ 90-120_____

120+_____

Customer Goals for their System:

Requires Immediate Attention: The following items are of utmost importance to your systems proper operation and require immediate attention to minimize future damage, loss of efficiency, and costly repairs.

Customer Accepts Recommendations
(Signature)_____

Customer Declines Recommendations
(Signature)_____

Customer Experience:

Ensure van and uniform are neat and clean _____

Call Customer prior to arrival _____

Park in view of the front door _____

Put on shoe covers _____

Ask permission to enter the home _____

Walk with customer around the home _____

Explain to customer what to expect today _____

OK to involve customer and share videos? _____

Confirm phone number to send videos _____

Thermostat:

Remove faceplate _____

Inspect batteries _____

Tighten Electrical connections _____

Inspect electrical connections _____

Fill hole behind thermostat _____

Clean thermostat inside and out _____

Airflow

Replace customer supplied filter _____

Inspect return for cleanliness, leaks and damage _____

Blower Housing, Motor and Wheel

Inspect supply for cleanliness, leaks and damage _____

Temp difference between return and supply _____

Condensate Drain System

Identify where drain line terminates _____

Vacuum and flush drain line (1/2 gallon min.) _____

Inspect condensate safety switch **Pass / Fail**

Inspect secondary drain pan **Pass / Fail**

Gas Furnace

Test for leaks at gas ball valve **Pass / Fail**

Test for leaks at gas line connections **Pass / Fail**

Test for leaks at furnace gas valve **Pass / Fail**

Test inducer fan running amps **R ____ A ____**

Test inducer fan capacitor _____

Verify pressure switch operation **Pass / Fail**

Verify ignitor operation **Pass / Fail**

Verify burner operation **Pass / Fail**

Clean flame sensor _____

Tighten/inspect electrical connections _____

Inspect flue assembly **Pass / Fail**

Electrical Furnace

Test heat strips amp draw **R ____ A ____**

Verify sequencer operation **Pass / Fail**

Tighten electrical connections _____

Inspect electrical connections **Pass / Fail**

Inspect IAQ product

Pass / Fail

Test blower motor amps **R ____ A ____**

Inspect blower motor cleanliness **Pass / Fail**

Inspect blower motor bearings **Pass / Fail**

Inspect blower motor for damage **Pass / Fail**

Test Blower Motor Cap _____

-Amps X 2,652 / Volts = Microfarads

Tighten electrical connections _____

Inspect primary drain line design	Pass / Fail	Inspect electrical connections	Pass / Fail
Indoor Coil		Electrical Disconnect	
Inspect for Cleanliness	Pass / Fail	Inspect the disconnect fuses	Pass / Fail
Inspect for visual signs of leaks	Pass / Fail	Tighten electrical connections	_____
Inspect primary pan for damage and flow	Pass / Fail	Inspect electrical connections	Pass / Fail
Document metering device	_____	Inspect surge protector	Pass /Fail
		Inspect electrical whip for damage	Pass / Fail
Refrigerant			
Document refrigerant type	_____		
Compressor			
Test compressor start amps (LRA)	R ____ A ____		
Test hard start kit capacitor	R ____ A ____		
Test mega ohms	Pass / Fail		
Test compressor running amps (RLA)	R ____ A ____		
Test defrost control board	Pass /Fail		
Outdoor Capacitors		Outdoor Fan Motor	
Test compressor capacitor	R ____ A ____	Inspect outdoor fan motor bearings	Pass /Fail
Test fan capacitor	R ____ A ____	Inspect outdoor fan motor blades	Pass / Fail
		Test outdoor fan motor amps	R ____ A ____
		Document outdoor fan motor temp.	_____
Main Line Contactor		Outdoor Coil	
Inspect contactor contacts	Pass / Fail	Clean condenser coil and frame	_____
Check for voltage drop across the contactor	Pass /Fail	Send customer video of progress	_____
Tighten electrical connections	_____	Inspect outdoor coil for leaks	Pass / Fail
Inspect electrical connections	_____	Inspect thermostat wires for damage	Pass /Fail
		Inspect Armaflex for damage	Pass / Fail

Customer

Go over job with customer _____

Collect signatures _____

Equipment Information: Unit _____ of _____

M # _____ **S #** _____

Brand _____ **Type** _____

M # _____ **S #** _____

Brand _____ **Type** _____

M # _____ **S #** _____

Brand _____ **Type** _____