



CHECKLISTS TO KEEP YOU ORGANIZED

HVAC Installation Checklist

Use this checklist document before, during, and after your HVAC system installs to ensure you do a thorough job. Scroll through to find tasks for pre-install inspections, furnace, AC, and heat pump installation, system testing, and closing the job.

This checklist is not designed to replace installation instructions from your company or manufacturer.

Arrival checklists

1. Before arrival

- Customer has HVAC system warranty information
- Customer received appointment reminders prior to installation
- Installer reviewed notes about the customer and their HVAC system
- Vehicle is loaded with necessary HVAC equipment, tools, and spare parts
- Customer received on-my-way text from installer

2. On arrival

- Appropriate personal protective equipment (PPE) is worn
- Customer and installer have confirmed what will be installed
- Customer equipment details have been recorded

3. Customer equipment details

- Existing model serial number(s):

- New model serial number(s):

Pre-install inspection tasks

4. Initial site safety inspection

- Inspected the space for debris
- Created adequate clearance to perform an installation
- No combustible materials are nearby (min. 3 ft. of clearance)
- Wood floors or carpets are protected with covering (e.g., drop cloth)

5. Unit inspection

- Ducts are insulated and sealed
- Gas piping is free of leaks
- Existing HVAC system has no other repairable damages
- Drain line is clear
- New unit model number matches order
 - If unit is incorrect: Distributor, office, or the correct party is notified
- New unit has no shipping damage, loose parts, or missing parts
 - If damaged: Distributor, office, or the correct party is notified
- Manufacturer's instructions for installation have been reviewed

Furnace installation

6. Safety tasks

- Power supply to the furnace is off
- Electrical wires and box are disconnected
- Thermostat wire is disconnected

7. Removal and preparation

- Condensation lines are clear
- Evaporator coil is removed
- Drain pans are empty
- Gas line is disconnected
- Exhaust venting is disconnected
- Ductwork is disconnected
- Old unit is placed away from workspace with enough clearance
- Return air opening for the new unit is created

8. New unit placement

- New filter rack is installed
- New furnace is placed on a solid, level surface
- Burner assembly is placed
- Flue pipe has adequate clearance for proper venting
- Supply ductwork is connected
- Exhaust venting is reinstalled
- Electrical and control pipe chases are properly sealed
- Gas line and flex are reconnected

Electrical wiring

- Main electrical wiring is connected
- Temperature sensors are installed
- Thermostat wiring is connected
- Wiring is compliant with NEC and local regulations

9. System testing

- Power is switched on
- Furnace's power-on light stays lit
- No unusual noises heard
- No leaks found

AC and heat pump installation

10. Safety tasks

- Refrigerant is safely evacuated from the system
- Circuit breaker is shut off
- Disconnect box is removed
- Flexible electrical conduit is removed

11. Removal and preparation

- Slab or composite pad is size-appropriate for new unit
- Sheet metal plenum is disconnected from furnace room (if replacing plenum)
- Indoor evaporator coil is removed
- Existing copper refrigerant lines are removed

12. New unit placement

- New indoor evaporator coil is installed
- Cased coil is connected and sealed to the sheet metal plenum
- Front of the plenum is installed
- New refrigerant line set is installed
- Low-voltage control wire is installed
- Air conditioner/heat pump is placed on a leveled slab or composite pad
- Refrigerant line set is formed and fitted to the unit's service valves
- Heat protection applied to the expansion valve before brazing
- Refrigerant line set is brazed in
- Liquid line filter drier is installed
- Heat protection applied to the line set
- Contaminants are purged from the system
- System is vacuumed
- Refrigerant is released into the system

Electrical wiring

- New disconnect box is installed
- High-voltage control wire is connected
- Low-voltage control wire is connected
- Thermostat wiring is connected
- Wiring is compliant with NEC and local regulations

Condensate drain line installation

- Condensate drain line is installed
- Condensate tubing or piping is secured
- Trap and overflow safety switch are installed into condensate system

13. System testing

- Power is switched on
- System has been test run for 15-20 minutes, or until air conditioning begins
- Thermostat operates properly

Measurements

Include applicable measurements only.

Suction and liquid line pressure	_____ psi	Supply air temp.	_____°F / C
Suction and liquid line temp.	_____°F / C	Return side static pressure	_____ psi
Superheat	_____	Supply side static pressure	_____ psi
Subcooling	_____	Temp. drop calculated	_____°F / C
Outdoor ambient dry bulb temp.	_____°F / C	High voltage current reading	_____
Indoor ambient dry bulb temp.	_____°F / C	Low voltage current reading	_____
Indoor wet bulb temp.	_____°F / C	Line set length	_____
Steam pressure	_____ psi	Potable water pressure	_____ psi
Hot water pressure	_____ psi	Hot water temp.	_____°F / C
Chilled water pressure	_____ psi	Chilled water temp.	_____°F / C

	Amperage
Blower motor	_____ amps
Outdoor fan motor	_____ amps
Compressor	_____ amps

14. Customer check-in

- Feedback requested from the customer
- Customer has been shown what's installed
- Customer understands how to operate the new system (thermostat usage, battery replacement, etc.)
- Customer understands how to properly maintain indoor and outdoor equipment
- Customer has been offered routine HVAC maintenance
 - Maintenance call scheduled? (Yes / No)
- Invoice for the job is created

15. Cleanup and closing checklist

- Locking cap is placed on the outdoor unit
- All garbage, materials, and debris are removed from the property
- Dirt, marks, and fingerprints are wiped off the property's surfaces
- Protective floor covering is removed