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.

Date	
Job #	
Customer Name	
Customer Address	
Customer Phone	
Customer Email	
Technician Name	
Existing Model Serial #	
New Model Serial #	

Tools + materials checklist

- ☐ Hand tools (e.g., pipe wrench, screwdrivers, torpedo level)
- ☐ Power tools (e.g., power drill, power saw)
- ☐ Specialized tools (e.g., multimeter, HVAC/R thermometer, manifold gauges)
- ☐ Safety tools (e.g., PPE, LOTO devices, voltage tester, safety harness)
- ☐ Business tools (e.g., phone or tablet equipped with HVAC software)

NOTES

- [ ] Spare parts that may be required based on the job requirements (e.g., fuse, capacitor, furnace filter)
- [ ] Vehicle is loaded with all necessary items

Arrival checklists

1. Pre-arrival

- [ ] Customer has approved install estimate
- [ ] Customer has HVAC system warranty information
- [ ] Customer received appointment reminders prior to installation
- [ ] Installer reviewed notes about the customer and their HVAC system
- [ ] Customer received on-my-way text from installer

NOTES

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

NOTES

Pre-install inspections

4. Initial site safety inspection

- [ ] Space is free of debris
- [ ] Air intake and dampers are clear and unobstructed
- [ ] Created adequate clearance to perform an installation
- [ ] No combustible materials are nearby (at least 3 feet of clearance)
- [ ] Wood floors or carpets are protected with covering (e.g., drop cloth)
- [ ] Technician is wearing shoe covers (e.g., cloth booties) to protect floors

NOTES

5. Existing unit troubleshooting

- ☐ Ducts are insulated and sealed
- ☐ Refrigeration system is free of leaks
- ☐ Gas piping is free of leaks
- ☐ Existing HVAC system has no other repairable damages
- ☐ Drain line is clear
- ☐ No notable contaminants or odors

NOTES

6. New unit inspection

- ☐ 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 unit is damaged:** Distributor, office, or the correct party is notified
- ☐ Manufacturer's instructions for installation have been reviewed

NOTES

Furnace installation

7. Safety tasks

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

NOTES

8. 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

NOTES

9. 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

NOTES

9a. Electrical wiring

- ☐ Main electrical wiring is connected and is up to code
- ☐ Unit is grounded
- ☐ Electrical and piping is sealed
- ☐ All screws and wiring are tightly connected
- ☐ Fuses and temperature sensors are installed
- ☐ Thermostat wiring is connected
- ☐ Thermostat settings are correct

NOTES

9b. Gas

- ☐ Gas supply line reconnected
- ☐ Piping joints are sealed
- ☐ Drip leg is installed
- ☐ Check for leaks and pressure

NOTES

10. System testing

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

NOTES

AC and heat pump installation

11. Safety tasks

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

NOTES

12. 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

NOTES

13. 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
- ☐ Nitrogen is purged 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

NOTES

13a. Electrical wiring

- ☐ Main electrical wiring is connected and is up to code
- ☐ New disconnect box is installed
- ☐ High-voltage control wire is connected
- ☐ Low-voltage control wire is connected
- ☐ Thermostat wiring is connected

NOTES

13b. 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

NOTES

13c. Air and water

- ☐ Fan mounting bolts are tight
- ☐ Fans are aligned and fully rotating, with lubricated motor bearings
- ☐ Water connections and valves installed
- ☐ Penetration points sealed
- ☐ Valve wiring connected to main control panel

NOTES

14. System testing

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

NOTES

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
Notes:			

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

Component	Good	Replace Soon	Replace Now	Notes

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

NOTES

16. Customer check-in

- ☐ 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 understands product and service warranty
- ☐ Customer has been offered routine HVAC maintenance
- ☐ Maintenance call scheduled? (Yes / No)

NOTES

- ☐ Invoice for the job is created
- ☐ Feedback requested from the customer

Signatures

Date	
Technician Name	
Technician Signature	
Customer Name	
Customer Signature	