



# HVAC Installation Checklist

23 Jun 2023 / Camilo Wensley

**Complete**

Score	<b>91.67%</b>	Flagged items	<b>2</b>	Actions	<b>1</b>
<b>Date and Time</b>	23.06.2023 11:52 PST				
<b>Customer Name</b>	Barbra Cornell				
<b>Location</b>	Buckhead Loop NE, Atlanta, GA 30305, USA (33.8494299, -84.3717124)				
<b>Technician Name</b>	Camilo Wensley				

## Flagged items & Actions

2 flagged, 1 action

### Flagged items

2 flagged, 1 action

Installation Checklist / Customer Communication Checklist

**Has the technician scheduled follow-up visits for routine maintenance and potential issues?**

No

We have yet to schedule a follow-up visit since the building owner has prior commitments.

To Do | Assignee SafetyCulture Staff | Priority High | Due 30.06.2023 11:59 PST | Created by SafetyCulture Staff

Conduct a follow-up visit for the newly installed indoor HVAC unit.

Please coordinate the details with the building owner or their representative.

Installation Checklist / Customer Communication Checklist

**Have the technician completed and submitted all required documentation, including permits and inspection reports?**

No

Will be submitting a final report upon finalizing the schedule for the follow-up visit

### Other actions

0 actions

## Installation Checklist

2 flagged, 1 action, 91.67%

### Pre-Installation Check

100%

Have the project specifications and requirements been reviewed?

Yes

Was a site visit performed to assess the installation location?

Yes

Is the installation location suitable for the HVAC unit?

Yes

Was the appropriate HVAC unit size and capacity determined based on load calculations?

Yes

Are the necessary permits and approvals for the installation obtained?

Yes

Is the unit inspected for shipping damage?

Yes

No damage was found in the shipped unit.

Does the model number match the order?

Yes

Is there a new filter in place?

N/A

## Installation Checklist

100%

### Indoor Unit Checklist

100%

Is an indoor HVAC unit being installed?

Yes

Type of indoor unit installed

Air Handler

Photo of air handler/furnace



Photo 1

Photo of air handler/furnace model & serial number



Photo 2

Was the ductwork adequately secured with screws and metal tape?

Yes

Are all wires neatly secured with wire ties?

Yes

Was an electric heater package installed?

Yes

Picture of the electric heater amperage on meter



Photo 3

Is a condensate drain trap required?

Yes

Does the indoor unit have an EZ Trap installed?

Yes

Is the condensate drain line secured with PVC glue?

Yes

Filter size

16x20x1

Was the new filter installed?

N/A

Was the indoor unit wiped down?

Yes

Were the trash and debris cleaned up?

Yes

Additional notes

The indoor unit installation was completed without any issues.

Additional photo(s)

Outdoor Unit Checklist

Is an outdoor HVAC unit being installed?

No

No action needed. Proceed with other items.

Thermostat Checklist

100%

Is a thermostat being installed?

Yes

Brand of thermostat installed

ABC Thermostat

Photo of thermostat



Photo 4

**Was the unit in each thermostat mode checked?**

Yes

**What is the final thermostat temperature and mode?**

72°F, Cool

The thermostat is functioning properly in all modes and the final temperature and mode are set as per the customer's request.

## Customer Communication Checklist

2 flagged, 1 action, 75%

**Did the technician allow the customer to see the unit in operation?**

Yes

**Have the technician conducted a final walkthrough with the client to demonstrate system operation and address any questions?**

Yes

After the installation, did the technician discuss the following topics with the customer?

**Thermostat settings**

Yes

**Warranty information**

Yes

**Maintenance agreements**

Yes

**Review request**

Yes

**Has the technician scheduled follow-up visits for routine maintenance and potential issues?**

No

We have yet to schedule a follow-up visit since the building owner has prior commitments.

To Do | Assignee SafetyCulture Staff | Priority High | Due 30.06.2023 11:59 PST | Created by SafetyCulture Staff

Conduct a follow-up visit for the newly installed indoor HVAC unit.

Please coordinate the details with the building owner or their representative.

**Have the technician completed and submitted all required documentation, including permits and inspection reports?**

No

Will be submitting a final report upon finalizing the schedule for the follow-up visit

## Completion

### Additional Remarks

The installation process was carried out according to the project specifications and requirements. The indoor unit and thermostat were installed properly and are in working condition. However, follow-up visits for routine maintenance and submission of required documentation, specifically the final report, are pending.

---

### Name and Signature of Technician



Camilo Wensley  
23.06.2023 19:39 PST

---

### Name and Signature of Customer



Barbra Cornell  
23.06.2023 19:39 PST

---

Media summary



Photo 1



Photo 2



Photo 3



Photo 4