

Home Owner Information

Name:

City:

Address:

State:

Zip:

Phone #:

Meter #:

Equipment Information

Equipment type:

Make:

Model:

Serial Number:

Year unit was manufactured:

Year unit was installed:

Other Manufacturer info: IE (Target charge information)

TXV:

CAP:

Does this unit appear to meet all the code requirements:

Notes:

Overall Condition of unit:

Notes:

SG4000 Initial readings:

Notes:

Maintenance Tasks

*Equipment testing should only be done when the equipment is operating in conditions which meet the manufacturer's operating range.

Air Distribution System

Task Inspect for particulate accumulation, intergirty of the filter housing and seal. Inspect grills, registers and diffusers for dirt accumulation. Inspect all accessible ductwork for moisture or biological growth, integrity of insulation and integrity of installation.

Corective Actions- Clean and correct as needed, make notes of conditions below

Notes:

Controls and Safeties

Tasks Test all modes of operation and control sequences for thermostat. Test zoning control to insure proper damper/value operation. Test the defrost control boards, test drain pan safety switch and unit safety switch.

Corrective Actions- Repair and replace as needed.

Notes:

Furnace

Tasks Inspect cabinet and clearance, electrical connections, all stand alone capacitors. Measure and record volts, Watts and amps
 Check airflow across heat exchanger, test ECM. Inspect fan belt, fan blades or blower.

Corrective Actions- Repair, tighten, lubricate or replace as needed.

Notes:

Evaporator Coil

Tasks Inspect cabinet, cabinet fasteners, cabinet panels, condensate drain, refrigeration.

Corrective Actions- Repair, replace, clean, insulate, adjust as needed

Notes:

Condensing Coil

Tasks Inspect cabinet, clearance of cabinet, electrical wiring, contactors and relays, check for refrigerant leaks, check the insulation, measure fan and compressor volts and amps, inspect coil fins

Corrective Actions- Repair, replace, clean, insulate, adjust as needed

Notes:

Accessories

Tasks Inspect cabinet and clearance, inspect the electrical, inspect all capacitors, filter racks, belt tension, water line, pad tray, drain hose, inspect all other accessories

Corrective Action- Repair, replace, clean, insulate, adjust as needed

Notes: