

# Heating & Cooling Checklist

**Heating System**    Service Recommended    Fuel Leak: Tank / Supply Line (Service Immediately)    No Sign Of Recent Service

**1) Type Of System [See Lower Section For Additional Information On Heat Pump(s)]**

- Forced Air:    Heat Pump (Air to Air)    Heat Pump (Geothermal)    Electric    Fossil Fuel    Hydronic (Coils In Air Handler)  
 Radiant; (Floor, Ceiling)    Baseboard (Fin, Cast Iron)    Radiator    Steam    Solar (Not part of standard inspection)  
 Electric    Baseboard    Wall Unit (With Blower)    Electric Radiant (Floor, Ceiling)    Portable (Potential Fire Hazard)  
 Centralized System (Heat not directly supplied to all rooms)    Separate Units    Other \_\_\_\_\_

**2) Fuel Supply**    Electric    Oil    Natural Gas    Propane    Solar    Wood, Coal

- Problem; Inadequate or Limited Heat Supply / Restricted, No Access / Motor Noisy / Amateur, Sloppy Installation / Unsafe Installation / Older <sup>1</sup>  
 Excessive Rust or Corrosion Noted At; Plenum / Heat Exchanger / Observation Port / Duct / Flue / Unit Casing / Near Pressure Relief Valve

**3) Condition**    Ok    Newer Unit   MFD \_\_\_\_\_   MFD \_\_\_\_\_    Not Operational (Have Serviced & Certified By HVAC Contractor)

- Problem;** Inadequate or Limited Heat Supply / Restricted, No Access / Motor Noisy / Amateur, Sloppy Installation / Older  
 Excessive Rust or Corrosion Noted At; Plenum / Heat Exchanger / Observation Port / Duct / Flue / Unit Casing / Near Pressure Relief Valve

**4) Burner** (With Fossil Fuel System)    Ok    **Problem;** Possible Cracks In Fire Box / Possible Cracks In Heat Exchanger / Poor Flame Color / Burner Not Firing / Poor Flame Shape / Flame Rolling Out / Inadequate or Restricted Air Supply To Unit / No Fuel / Fuel Turned Off (not tested)

**5) Filter**    Yes    Disposable    Reusable    Electronic    Located In The; Air Handler / Air Return / Ductwork

- Problem; Missing / Poor Access / Missing Cover / Dirty / Failing / Sucked Into Unit / Non Functional / Too Small For Opening / Not Located

**6) Air Handler**    Ok    **Problem;** Coils Dirty / Blower Dirty/ Coils Icy/ Coils Icing, Damaged / Standing Water In Unit / Unit Noisy / Rusted

**7) Ductwork**    Rigid Metal    Flex Metal    Plastic    Masonry    Other \_\_\_\_\_

**8) Flue**    Ok   Rigid Metal    Flex Metal    Plastic Flex    Insulated Fiberboard (fiberglass lined)    Ductless (plastic tubing)

- Problem;** Corroded / Deteriorated / Unable To Fully Inspect / Excessive Soot / Reversed Connection / Inadequate Connection / Hazardous  
Poor Condition / Inadequate Slope / Possible Asbestos / Damper Missing / Damper Stuck, Cemented Shut / Sloppy, Amateur Workmanship

**9) Thermostat**    Ok    **Problem;** Damaged / Not Operational / Inadequate Installation / Not Operating Properly / Poor Location

• **Additional Comments** \* Heat Systems are checked for operation and non remaining life expectancy or warranty is implied. <sup>1</sup> An older unit may be nearing or at the end of life. Heat exchangers should be inspected and certified by a heating contractor. Systems require routing maintenance. MFD abbreviated for manufactured date and may not be readable on unit.

**Heat Pump / Air Conditioner**    (A/C Unit Not Checked in Temperatures Which Have Been Below 60°F in the Past 24 Hours).

**1) Type Of System**    Heat Pump    Air Conditioner    Shared    Window / Wall Unit (not part of inspection)    Gas Unit

**2) Condition**    Ok    Newer Unit   MFD \_\_\_\_\_   MFD \_\_\_\_\_    Not Operational (Have Services, and Certified By HVAC Contractor)

- Problem;** Restricted Access / Noisy / Overflow Pan; Missing, Standing Water / Sloppy, Amateur, Inadequate Installation / Older Unit <sup>1</sup>

**3) Compressor Unit**    Ok    **Problem;** Not Level, Elevated / Noisy / Damaged Rusted / Coils Damaged / Coils Appear To Be Icing

Unit Ceased / Unit Not Operational / Insulation On Refrigerant Lines Missing, Deteriorated / Oil Leak Observed / Fan Vibrating / Older Unit

**a)  Refrigerant Lines Temperature**    Variation Noted IN Lines (Good)    **Problem;** Close / Same (May be a sign of low refrigerant, or compressor failure)

**#1 Temperature Reading**   Supply \_\_\_\_\_°   Return \_\_\_\_\_°    Inadequate (may indicate low refrigerant)

- Too High (may indicate inadequate return)

a)  RLA <sup>2</sup> [Recommended \_\_\_\_\_ Amps / Observed \_\_\_\_\_ Amps (if RLA observed meets or exceeds recommended compressor may be failing)]

**#2 Temperature Reading**   Supply \_\_\_\_\_°   Return \_\_\_\_\_°    Inadequate (may indicate low refrigerant)

- Too High (may indicate inadequate return)

a)  RLA <sup>2</sup> [Recommended \_\_\_\_\_ Amps / Observed \_\_\_\_\_ Amps (if RLA observed meets or exceeds recommended compressor may be failing)]

**4) Condensate**    Ok    **Problem;** Drain Clogged, Leaks / Inadequate Installation, Termination / Could Not Operate Pump / Pump Failing

• **Additional Comments** \* Air conditioners and heat pumps have a life expectancy of 8 to 12 years. Air Conditioners and Heat Pumps are checked for operation and no remaining life expectancy or warranty is implied. <sup>1</sup> An older unit may be nearing or at the end or it's life. See additional information for heating systems, ductwork, filters, etc., above. <sup>2</sup> RLA) Running Load Amp. Running Load Amp test is optional.