

Date

Job #

Invoice #

Tech



# SYSTEM PERFORMANCE & EFFICIENCY REPORT

Name

Address

City

State

Zip

## SAFETY INSPECTION ITEMS BELOW ARE PRINTED IN ORANGE

THERMOSTAT				DUCT WORK SYSTEM				FURNACE / AIR HANDLER CONT.			
	GOOD	MAYBE	BAD		GOOD	MAYBE	BAD		GOOD	MAYBE	BAD
	N/A				N/A				N/A		
1. Energy-saving thermostat existing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	28. Show cleanliness of duct work	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	57. Measure temp rise: _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Batteries replaced (homeowner supplied)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	29. Supply ducts insulated	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	58. Adjust gas pressure: _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Thermostat mounted firmly to wall	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	30. Are the boots sealed to the floor?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	59. Check limit switches and mounts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Program set to client's needs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	31. Overall condition of duct work	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	60. Check burner crossover ports	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>AIR CONDITIONING / HEAT PUMP</b>				<b>FURNACE / AIR HANDLER</b>							
	GOOD	MAYBE	BAD		GOOD	MAYBE	BAD		GOOD	MAYBE	BAD
	N/A				N/A				N/A		
5. Log compressor amps: S ____ R ____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	37. Return static pressure: _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	61. Vacuum furnace area and burners	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Condenser fan amps / condition: _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	38. Supply static pressure: _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	62. Check for sufficient comb. air	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. Capacitor uF value: C ____ F ____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	39. Evaporator coil cleaning needed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	63. Clean combustion air vent screen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. Volt drop / inspect contactor: _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	40. Inspect start collar seal at plenum	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	64. Inspect heat exchanger	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9. Outdoor temp: Indoor ____ WB Temp ____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	41. Inspect blower cabinet insulation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	65. Check hoses for cracks & wear	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10. Unit superheat: _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	42. Inspect blower wheel cleanliness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	66. Check pressure switch	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
11. Unit sub cool: _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	43. Inspect all electrical	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	67. Check for proper flue rise	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
12. Tighten wire connections	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	44. Check circuit board for bum marks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	68. Measure flue clearances	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
13. Condition of start assist device	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	45. Check blower wheel bearings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	69. Check flue pipe for leaks and rust	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
14. Test defrost timer operation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	46. TXV bulb mounted @10 or 2	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	70. Inspect PVC for leaks, etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
15. Test reversing valve operation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	47. Inspect for signs of refrigerant leaks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	71. Test gas connections for leaks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
16. Check condition of coil fins	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	48. Primary drain ran properly	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	72. Any flammables near furnace	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
17. Check for refrigerant leaks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	49. Secondary drain ran to daylight	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	73. Check for proper ignition	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
18. O-ring Schrader caps installed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	50. Check condensate pump	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	74. Run furnace in all stages	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
19. Condition of electrical disconnect	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	51. Inspect drain safety switch	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	75. Test gas shut off operation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
20. Tighten lugs in disconnect & circuit breaker	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	52. Pan treatment needed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	76. Carbon Monoxide detector installed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
21. Verify proper circuit breaker size to name plate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	53. All screws replaced in cabinet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	77. Surge protection installed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
22. Verify proper wire size to unit	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	54. Read blower motor amps: _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	78. UV germicidal lamp needed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
23. Low voltage wire connection	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	55. Check inducer motor amps: _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	79. Clean / wax outside of the furnace	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
24. Condensing unit is level	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	56. Blower capacitor uF value: _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	80. Filter change / clean (standard size or club)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
25. Shrubs are cut back from unit	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>					81. Install sticker on front of furnace	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
26. Line set is insulated to condensing unit	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>					82. Show owner post operation of furnace	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
27. Install sticker on outdoor unit	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>					<b>ADDITIONAL ITEMS</b>			
								83. _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
								84. _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
								85. _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

ADDITIONAL INSTALLATIONS / PROPOSED WORK			
ITEM#	DESCRIPTION OF ATTENTION NEEDED	WORK DONE	MEMBER RATE

ADDITIONAL JOB NOTES / INSTRUCTIONS