



EFFICIENT SYSTEMS

HEATING & AIR CONDITIONING

"OUR NAME MEANS JUST WHAT IT SAYS"



CHECKSHEET

NAME: _____ ADDRESS: _____ CITY: _____

DATE: ___/___/___ TIME IN: _____ TIME OUT: _____ TECHNICIAN: _____ EQUIPMENT AGE: _____

OUTDOOR UNIT MODEL: _____ AIR HANDLER MODEL: _____ COIL MODEL: _____

SERIAL #: _____ SERIAL #: _____ SERIAL #: _____

EQUIPMENT CONDITION: GOOD FAIR POOR SAFETY ISSUES: _____

DUCTWORK TYPE: FIBERBOARD SYSTEM JOVAL SYSTEM FLEX SYSTEM FIBERBOARD W/FLEX OR JOVAL POP-OFFS OTHER _____

DUCTWORK CONDITION: GOOD FAIR POOR LEAKY DUCTWORK RECOMMENDATIONS: NO REPAIRS SEAL REPLACE

ADDITIONAL NOTES: _____

PRE-SERVICE CHECKS

- Customer Satisfied with System Performance
- Customer Dissatisfied with System Performance

THERMOSTAT CHECKS

- Record Thermostat Settings:
- Check Terminals for Tightness
- Clean Bi-Metal, Inspect Mercury Switch
- Check to see if Thermostat is Level
- Check/Adjust Thermostat Calibration
- Digital Thermostat
- If Customer is dissatisfied with temperature control in heating check and adjust the Heat Anticipator setting to match control circuit amperage draw

BLOWER COMPARTMENT CHECKS

- Check Blower Supply Voltage _____ vac
- Check Blower Motor Amperages _____ Amps _____ RLA
- Check Electrical Wiring, connections, insulation, for safety
- Check/Clean/Replace Filter
- Check blower compartment insulation (if applicable)

DIRECT DRIVE BLOWER

- Check blower bearings
- Lubricate all blower bearings
- Check & Clean blower compartment
- Check blower wheel for free & balanced rotation
- Check blower wheel, housing, mounts & set screw for tightness
- Ensure all motor leads are taped up and secured

BELT DRIVE BLOWER

- Make all above checks
- Remove belt and check for wear
- Check and adjust pulley alignment
- Check & Adjust belt tension

ELECTRONIC AIR CLEANER/UVC LAMPS

- Check electrical wiring connections, insulation, for safety
- Check Sail switch, interlock switch
- Check test button operation
- Check Supply Voltage
- Wash Cells/Pre-filter
- Ensure lamp operation
- Date the lamp was last changed: ___/___/___

ALL UVC LAMPS SHOULD BE CHANGED 1 TIME PER YEAR. ALL LENOX PURE AIR SYSTEMS CATALYST AND UVA LAMPS SHOULD BE CHANGED EVERY YEAR

FILTERS AND FILTER SYSTEMS

- Check and/or replace 4" Honeywell Grille Mount Filter
- Check and/or replace Lennox Pure Air Filter
- Check and/or replace Abatement Technologies 5" final filter
- Check and/or replace Honeywell 4" Duct mount filter

HEATING SYSTEM CHECKS

- Check electrical wiring, connections and insulation
- Check total amperage draw _____ amps
- Check and record temperature rise _____ °F

GAS HEATING

- Check & Clean burners for lint, dust & scale
- Check for cracks in the Heat Exchanger
- Light & check pilot and burner flame
- Check electronic ignition control
- Check & adjust for quiet even burner ignition
- Check & record outlet manifold pressure _____ "wc
- Check gas valve and shutoff valve for gas leaks
- Check safety lockout and high limit switch
- Check Temperature rise _____ °F
- Check induced draft motor amperage _____ Amps _____ RLA
- Check draft pressure switch
- Check automatic vent damper system *if applicable*
- Check draft diverter
- Check for proper roof penetration
- Check for proper venting and clearances
- Gas manifold hand valve is left open

COOLING/HEAT PUMP

- OD Temperature _____ °F
- Check outdoor wiring, connections, electrical for safety
- Check & clean evaporator coil
- Add algacide tablets to primary drain pan
- Check/Clean condensate drain with Openup
- Don't use Openup on black plastic drains/condensate pumps**
- Check condenser motor, blade, guard & bearings
- Check & clean condenser coil
- Check line set for evidence of a refrigerant leak
- Record Supply Voltage _____ vac
- Record Freon Pressures _____ HS _____ LS
- Record Subcooling _____ ° Superheat _____ °
- Record temps across coil _____ RA _____ SA
- Check amp draw on condenser fan _____ Amps _____ FLA
- Check amp draw on compressor _____ Amps _____ RLA
- Check reversing valve (Heat Pump Only)
- Check defrost control (Heat Pump Only)
- Check auxiliary electric heat during defrost (Heat Pump Only)

POST SERVICE CHECKS

- Thermostat at original setting and all breakers in the ON position
- All areas left neat and clean
- Explain and leave a copy of this checksheet and invoice with the customer
- Leave stickers on unit
- Electrical Disconnect(s) left on

CUSTOMER INTERESTED IN:

- DIGITAL/PROGRAMMABLE THERMOSTAT
- INDOOR AIR QUALITY SOLUTIONS/TEST
- HIGH EFFICIENCY 4" FILTER
- NEW SYSTEM QUOTE

License TACLA 000348C

2410 Pope • Beaumont, TX 77703 • (409) 838-1676 • (409) 385-2824 • (409) 985-3462