HVAC Tune-Up Checklist and Report Card

Customer	[Name] · [Phone]	**Date**	[Date]
Service address	[Street, City, State ZIP]	**Technician**	[Name]
Visit type	☐ Cooling tune-up (spring) ☐ Heating tune-up (fall) ☐ Both	**Agreement**	☐ Member, plan: [Tier] ☐ Non-member
Outdoor unit	[Make] · [Model] · [Serial]	**Refrigerant**	☐ R-410A ☐ R-32 ☐ R-454B ☐ R-22 ☐ Other: [ ]
Indoor unit	☐ Gas furnace ☐ Air handler ☐ Heat pump · [Make] · [Model] · [Serial]	**Filter size(s)**	[e.g. 20x25x1]
Thermostat	[Make / model] · Batteries: ☐ Replaced ☐ Not needed	**Time on site**	Arrived [:] · Left [:]

The 21 points, by visit

Result: **OK** = inspected, within spec or clean. **Attn** = out of spec, dirty, or a recommendation on page 2. **N/A** = not on this system. A point only counts when it was done; leave the box empty rather than ticking it.

#	Cooling visit (spring)	OK / Attn / N/A	Heating visit (fall), gas furnace or heat pump	OK / Attn / N/A
1	Thermostat: operation, calibration, level, batteries	☐ ☐ ☐	Thermostat: operation, calibration, heat call, batteries	☐ ☐ ☐
2	Air filter: inspect, replace, record size	☐ ☐ ☐	Air filter: inspect, replace, record size	☐ ☐ ☐
3	Indoor (evaporator) coil: inspect fins, clean if fouled	☐ ☐ ☐	Cabinet, clearances, combustibles near vent or furnace	☐ ☐ ☐
4	Condensate drain, pan, trap: flush, treat, test float switch	☐ ☐ ☐	Blower wheel cleanliness; blower motor amps vs nameplate FLA	☐ ☐ ☐
5	Blower wheel cleanliness; blower motor amps vs nameplate FLA	☐ ☐ ☐	Total external static pressure vs rated (typically 0.5" WC or less)	☐ ☐ ☐
6	Total external static pressure vs rated (typically 0.5" WC or less)	☐ ☐ ☐	Temperature rise across heat exchanger, inside nameplate range	☐ ☐ ☐
7	Temperature split, return to supply (about 16 to 22°F, humidity dependent)	☐ ☐ ☐	Heat exchanger: visual or camera inspection for cracks, rust, flame disturbance at blower start	☐ ☐ ☐
8	Refrigerant charge check: line temps, superheat (fixed orifice) or subcooling (TXV, about 8 to 14°F)	☐ ☐ ☐	Burners: inspect, clean, flame pattern steady and blue	☐ ☐ ☐
9	Refrigerant lines: insulation intact, no oil stains at joints	☐ ☐ ☐	Igniter: hot surface igniter cracks and ohms, or spark gap	☐ ☐ ☐
10	Outdoor (condenser) coil: wash, straighten fins, clear debris from base pan	☐ ☐ ☐	Flame sensor: clean, microamps recorded (1 to 10 µA, best 2 to 6)	☐ ☐ ☐
11	Condenser fan motor: amps vs FLA, blade balance, shaft endplay	☐ ☐ ☐	Inducer motor: amps, bearing noise, pressure switch hose and port	☐ ☐ ☐
12	Compressor amps vs nameplate RLA	☐ ☐ ☐	Gas pressure: inlet and manifold vs data plate (NG about 3.5" WC, LP about 10 to 11" WC)	☐ ☐ ☐
13	Run capacitor(s): microfarads under load vs rating, within 6%	☐ ☐ ☐	Combustion analysis: CO air-free under 100 ppm target; 400 ppm or more, shut down	☐ ☐ ☐
14	Contactor: pitting, burned contacts, coil, voltage drop	☐ ☐ ☐	Venting: slope, support, termination, rust, condensate, blockage	☐ ☐ ☐
15	Electrical connections: tightened, no heat discoloration, wire size matches load	☐ ☐ ☐	Combustion air supply correct for the appliance and the space	☐ ☐ ☐
16	Disconnect and fuse or breaker: correct size, not bypassed, case intact	☐ ☐ ☐	Safeties tested: high limit, rollout switches, pressure switch, door switch	☐ ☐ ☐
17	Line voltage measured vs nameplate	☐ ☐ ☐	Condensate trap and drain (condensing furnaces); outdoor drain ports (heat pumps)	☐ ☐ ☐
18	Control board and low voltage: 24 V present, no hot spots or burn marks	☐ ☐ ☐	Electrical: connections, disconnect, grounding, line voltage vs nameplate	☐ ☐ ☐
19	Cabinet, panels, clearance, pad level, unit free of debris and nests	☐ ☐ ☐	Control board and low voltage: 24 V present, no burn marks	☐ ☐ ☐
20	Visible ductwork: disconnected runs, leaks, crushed flex, missing insulation	☐ ☐ ☐	Heat pumps: reversing valve, defrost cycle, auxiliary heat strips and amps	☐ ☐ ☐
21	Final run test: full cooling cycle, disconnect back in, readings explained to customer	☐ ☐ ☐	Final run test: full heat call, ignition sequence, blower delays, ambient CO check, readings explained	☐ ☐ ☐

Refrigerant is added only by an EPA Section 608 certified tech, and only after the leak is found. Record ounces and the leak-search result on page 2.

Readings, before and after

Fill in every reading you took. A blank cell means the point was skipped, and that is fine to say. "After" only where you cleaned, adjusted or replaced something.

Cooling reading	Target	Before	After
Outdoor / return air DB and WB, °F	Record conditions		
Supply air dry bulb, °F	Record		
Temperature split, °F	About 16 to 22; lower when the air is humid		
Total external static pressure, " WC	Rated on data plate; 0.5 or less is typical		
Suction line temperature / pressure	Record		
Liquid line temperature / pressure	Record		
Superheat or subcooling, °F	Chart or data plate value; 8 to 14 if none		
Compressor amps / nameplate RLA	Under RLA		
Condenser fan amps / nameplate FLA	Under FLA		
Blower motor amps / nameplate FLA	Under FLA		
Capacitor(s): rated µF / measured µF	Within 6% of rating		
Line voltage, V	Nameplate range		
Refrigerant added, oz (type)	Zero unless a leak was found and reported		

Heating reading	Target	Before	After
Return / supply air temperature, °F	Supply read out of sight of the heat exchanger		
Temperature rise, °F	Nameplate range, e.g. 45 to 75		
Total external static pressure, " WC	Rated on data plate; 0.5 or less is typical		
Inlet / manifold gas pressure, " WC	Data plate; NG about 3.5, LP 10 to 11		
Flame sensor, µA	1 to 10, best 2 to 6		
Flue CO air-free, ppm (and O2 %)	Under 100 and stable; 400 or more, shut down		
Inducer motor amps / nameplate	Under nameplate		
Blower motor amps / nameplate FLA	Under FLA		
Ambient CO in living space, ppm	0 · CO alarm present ☐ Yes ☐ No		

Condition grades

A = within spec, no action. B = working, watch it, likely a recommendation next year. C = out of spec or unsafe, recommendation below. Grade what you measured.

Component	Grade	Note	Component	Grade	Note
Compressor	☐A ☐B ☐C		Heat exchanger	☐A ☐B ☐C	
Condenser fan motor	☐A ☐B ☐C		Burners and igniter	☐A ☐B ☐C	
Blower motor and wheel	☐A ☐B ☐C		Flame sensor	☐A ☐B ☐C	
Capacitor(s)	☐A ☐B ☐C		Inducer motor	☐A ☐B ☐C	
Contactor	☐A ☐B ☐C		Venting	☐A ☐B ☐C	
Indoor coil	☐A ☐B ☐C		Gas piping and pressure	☐A ☐B ☐C	
Outdoor coil	☐A ☐B ☐C		Safeties	☐A ☐B ☐C	
Condensate drain	☐A ☐B ☐C		Ductwork (visible)	☐A ☐B ☐C	
Refrigerant circuit	☐A ☐B ☐C		Thermostat and controls	☐A ☐B ☐C	

Recommendations

Every recommendation needs the reading that caused it. "Capacitor 40.1 µF on a 45 µF rating (11% low)" is a recommendation; "capacitor weak" is a guess. Photos attached: ☐ heat exchanger ☐ coils ☐ nameplates.

Item	Reading vs spec (why)	Standard price	Member price	Decision
		$	$	☐ Approved ☐ Declined
		$	$	☐ Approved ☐ Declined
		$	$	☐ Approved ☐ Declined

Status at departure	☐ Running normally ☐ Shut down for safety, customer told in writing ☐ Disconnect reinstalled
Next visit due	[Season, month] · Visit [1 / 2] of [2] under the agreement year ending [Date]
Technician	[Signature] · [Printed name] · [Date]
Customer	I received a copy. Attn items and C grades were explained to me, with prices. [Signature] · [Date]

One copy to the customer, one on file per unit; compare next year's readings against this sheet, the trend is the diagnosis. Not a substitute for the manufacturer's instructions, local code or safety training. Free from Deepsel, usedeepsel.com.