

SimplyWise HVAC Inspection Checklist

Property address

System type (furnace / air conditioner / heat pump / package unit)

Technician

Date

Inspection type (seasonal tune-up / full or move-in)

Furnace (heating)

- ☐ Filter inspected, cleaned or replaced
- ☐ Burner flame checked for steady blue color, no yellow tipping
- ☐ Gas connections and gas pressure checked
- ☐ Burner combustion checked
- ☐ Motor bearings and moving parts lubricated
- ☐ Heat exchanger inspected for cracks or corrosion (full inspection only)
- ☐ Flue pipe and venting checked for proper draft (full inspection only)

Air conditioner / heat pump (cooling)

- ☐ Evaporator and condenser coils cleaned
- ☐ Refrigerant level checked and adjusted
- ☐ Blower components cleaned and adjusted
- ☐ Condensate drain checked and cleared
- ☐ Outdoor unit clearance and fins checked for damage
- ☐ Refrigerant leak test performed if a loss is suspected (full inspection only)
- ☐ Heat pump defrost cycle tested (heat pump systems only) (full inspection only)

Ductwork

- ☐ Visible duct sections checked for disconnection, crushing or gaps
- ☐ Supply and return airflow checked at registers
- ☐ Duct insulation checked in unconditioned spaces (attic, crawlspace) (full inspection only)

Thermostat and controls

- ☐ Thermostat settings checked
- ☐ System controls tested for proper cycling (heat, cool, fan)
- ☐ Programmable or smart schedule reviewed against occupancy (full inspection only)

Electrical and refrigerant safety

- ☐ All electrical connections tightened
- ☐ Voltage and current draw measured on motors
- ☐ Refrigerant handling confirmed EPA 608 certified technician only (full inspection only)
- ☐ Capacitor and contactor condition tested (full inspection only)

Safety checks

- ☐ Carbon monoxide detector near the furnace tested

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- ☐ Disconnect switch and breaker labeling verified at outdoor unit
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- ☐ Furnace cabinet checked for scorch marks, rust or soot (full inspection only)
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Notes (anything skipped, flagged, or needing a follow up visit)

Technician initials: _____

Date: _____

Homeowner or property manager signature: _____

Date: _____

This checklist is a record of the systems inspected at the address and date above. It carries no price. Quote any repair separately and use this sheet to track what was actually inspected once the technician is on site.

Free template from SimplyWise. simplywise.com/blog

Estimate a repair from a photo in the SimplyWise Cost Estimator app: swcostestimator.app.link/ce-ai