# HVAC WORK ORDER

| | | | |
|---|---|---|---|
| **Work order number** | | **Date** | |
| **Technician** | | **Company and license number** | |
| **Customer or building** | | **Address or room** | |
| **Phone** | | | |

## Customer or building, and job

| | |
|---|---|
| **Job type** | ☐ Repair ☐ Maintenance visit ☐ Estimate ☐ Install |
| **Complaint, in the customer's words** | |

## Equipment card

Copy this once per system. Next visit, read it instead of climbing to the data plate.

| | |
|---|---|
| **Make** | |
| **Model** | |
| **Serial number** | |
| **Unit ID and location** | |
| **Tonnage** | |
| **Refrigerant type** | |
| **Metering device** | ☐ TXV ☐ Piston |
| **Filter sizes and quantity** | |
| **Belt size** | |
| **Year installed** | |

## Readings

Write the target from the data plate or the manufacturer beside each reading.

| Reading | Unit | Target | Before | After |
|---|---|---|---|---|
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## Diagnosis and work done

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|---|---|
| **Diagnosis** | |

| | |
|---|---|
| **Work done** | |
| **Refrigerant added (type and pounds)** | |

## Parts and labor

| Item | Quantity | Price | Labor hours | Rate |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

## Approval of extra work

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|---|---|
| **Approved up to ($)** | |
| **Approved by, how and when** | |
| **PO or budget code (if any)** | |
| **Customer or building contact signature and date** | |

## Every visit

| Item | OK | Fix | Notes |
|---|---|---|---|
| Thermostat settings and operation checked | ☐ | ☐ | |
| Air filter checked, changed if dirty | ☐ | ☐ | |
| Electrical connections tightened, motor voltage and amps measured | ☐ | ☐ | |
| Moving parts lubricated | ☐ | ☐ | |
| Condensate drain checked, flushed if needed | ☐ | ☐ | |
| Controls and starting cycle checked | ☐ | ☐ | |

## Cooling visit (spring)

| Item | OK | Fix | Notes |
|---|---|---|---|
| Evaporator and condenser coils checked, cleaned if needed | ☐ | ☐ | |
| Refrigerant level checked, adjusted if needed | ☐ | ☐ | |
| Blower cleaned and adjusted, airflow checked | ☐ | ☐ | |

## Heating visit (fall)

| Item | OK | Fix | Notes |
|---|---|---|---|
| Gas or oil connections and gas pressure checked | ☐ | ☐ | |
| Burner combustion checked | ☐ | ☐ | |
| Heat exchanger inspected | ☐ | ☐ | |
| Carbon monoxide tested | ☐ | ☐ | |

## Boiler visit (fall)

| Item | OK | Fix | Notes |
|---|---|---|---|
| Water temperature and pressure recorded | ☐ | ☐ | |
| Low-water cutoff tested | ☐ | ☐ | |
| Flame safeguard tested | ☐ | ☐ | |
| Stack temperature and combustion checked | ☐ | ☐ | |

## Before you open a unit

| Item | OK | Fix | Notes |
|---|---|---|---|
| Power locked out and tagged before opening the unit | ☐ | ☐ | |
| Roof access arranged, building contact told | ☐ | ☐ | |

Free template from goodtaco.ai/blog/hvac-work-order. Copy, change and print it as you like.