

HVAC Contractor Photo Documentation Checklist

Ductwork disappears above ceilings. Refrigerant lines get buried in walls. Furnace flues get sealed behind drywall. When a warranty claim, inspection failure, or billing dispute comes up — the question is always the same: **can you prove what was installed, how it was charged, and that it was done to code?** This guide gives your crew the exact shots to capture at each of 7 critical phases — for residential splits, commercial RTUs, mini-splits, heat pumps, and new construction alike.

THE 7 PHASES

Document Every Phase, Protect Every Job

01 PHASE Pre-Job Site & Equipment Assessment

- Existing unit model, age & condition
- Existing system type & configuration
- Ductwork condition & insulation
- Thermostat type & location
- Electrical service & disconnect
- Pre-existing damage near equipment
- Mechanical room access & condition
- Gas line & meter location
- Flue / exhaust venting condition
- Permit & approved plans on-site

02 PHASE Safety, LOTO & Pre-Conditions

- Electrical disconnect LOTO applied
- Refrigerant recovery gear staged
- EPA 608 cert on tech ID
- Combustible gas check at furnace
- Roof condition for RTU work
- PPE in use — gloves, glasses
- Panel working clearance: 30" min
- Hazardous materials near equipment

03 PHASE Equipment Placement & Pad

- Outdoor unit on level pad or rails
- Pad elevation: 2" above grade min
- Condensate drain path & termination
- Outdoor unit service clearances
- RTU curb — level, sealed & flashed
- Line set penetration sealed
- Indoor unit mounting & level
- Air handler / furnace clearances
- Equipment model & serial label
- Shipping damage inspection



04 PHASE Ductwork & Airflow

- Wide shot — full duct system
- Flex duct: no kinks or compression
- Filter slot sealed — no bypass
- Supply & return sizes per design
- Duct insulation R-value verified
- Return air: no combustion appliance
- Duct joints — mastic or UL tape
- Register & grille locations
- Duct leakage test results

05 PHASE Refrigerant Lines & Charging

- Line set size per equipment specs
- Connections — no kinks at fittings
- Refrigerant type labeled on line
- Suction line insulated full length
- Nitrogen pressure test pre-charge
- Subcooling / superheat logged
- Line set supports every 6 ft
- Vacuum: 500 microns or below
- Manifold gauge readings captured

06 PHASE Electrical & Controls

- Disconnect size matches unit
- Low-voltage wire: separated from HV
- Control board connections secure
- HACR breaker for HVAC equipment
- Thermostat wiring labeled & correct
- Aux / emergency heat wired (HP)
- High-voltage whip — strain relief
- Thermostat away from heat/drafts
- Surge protection installed

07 PHASE Commissioning & Closeout

- Startup — heat & cool modes tested
- Delta-T across coil documented
- CO test at flue & living space
- Static pressure reading in spec
- Condensate drain flow tested
- Permit card / inspection sticker
- Airflow at each register measured
- Gas pressure at manifold (furnace)
- Client walkthrough — filter & T-stat

HOW TO USE THIS IN THE FIELD**Turn This Checklist Into Your Daily Workflow**

- 01 Photograph Before Anything Gets Covered**

Ductwork, refrigerant lines, and flues all disappear behind drywall and ceilings. That's your last chance — once it's closed in, there's no proof.

- 02 Capture the Numbers That Matter**

Vacuum readings, subcooling, superheat, static pressure, and delta-T are the technical proof that the system was commissioned correctly.

- 03 Document Pre-Existing Conditions First**

Photos of the old unit, existing ductwork issues, and pre-job damage protect you from being blamed for problems you inherited.

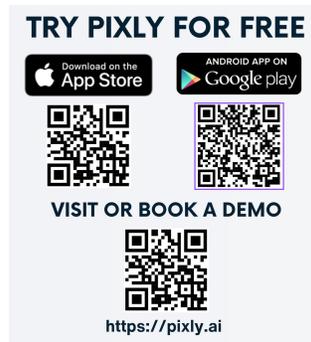
- 04 Get the Permit Sticker in Every Final Shot**

A photo of the finished system alongside the stamped permit card is the clearest proof of a code-compliant, inspected installation.

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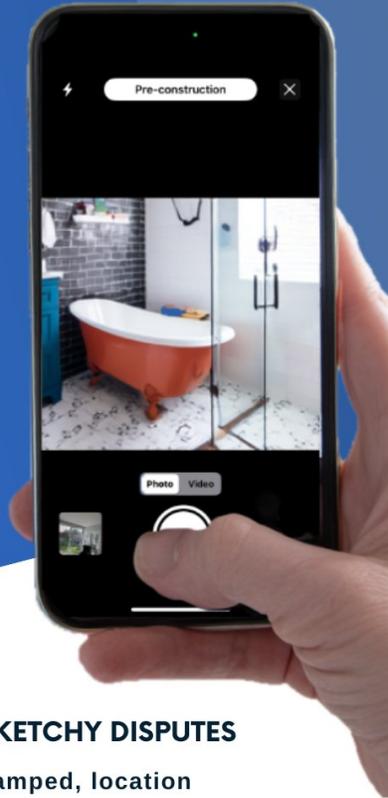
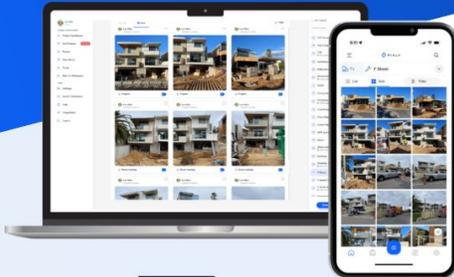
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