

HVAC Punch List Template

31 closeout items. Check each item only after it is verified at the wall, photo taken. Editable Google Sheets copy and the free mobile version at www.mypunchlistapp.com/templates/hvac.

Project: _____ Date: _____ Prepared by: _____

Equipment Setting & Connections

- ☐ **Installed equipment matches the schedule: model, tonnage, efficiency**
Verify nameplates against the equipment schedule and AHRI match-up. A mismatched coil and condenser voids the efficiency rating and sometimes the warranty.
- ☐ **Condenser level on pad, clearances to walls and shrubs per manufacturer**
Pad set above grade, unit level both axes, service clearance on the valve side, discharge air not blowing into a fence two feet away.
- ☐ **Lineset insulated full length, sealed at penetrations, no kinks**
Suction line insulation continuous and UV-protected outside, wall penetration sealed, no flattened bends behind the unit where nobody looks.
- ☐ **Primary condensate sloped, trapped per manufacturer, terminating legally**
Trap depth per the install manual (negative vs positive pressure matters), slope continuous, termination not dumping over a walkway or at the foundation.
- ☐ **Secondary pan and float switch installed and cycle-tested**
Pan under any attic or above-ceiling unit, float switch actually kills the unit when lifted, secondary drain to a conspicuous termination the owner will notice.
- ☐ **Furnace flue pitched, supported, and terminated per venting tables**
Category-correct vent material, screwed joints, slope back to the appliance on condensing runs, termination clearances to openings and grade verified.
- ☐ **Combustion air provided and unobstructed for fuel-fired equipment**
High and low openings or direct-vent piping per code; mechanical closet louvers not painted shut or blocked with stored Christmas boxes at handoff.
- ☐ **Disconnects within sight, whips secured, breaker sizes match nameplate MOCP**
Verify minimum circuit ampacity and max overcurrent protection against actual breakers; a 60A breaker on a 35A-max condenser fails inspection and roasts warranties.

Ductwork & Distribution

- ☐ **Duct joints sealed with mastic or approved tape, boots sealed to drywall**
No cloth duct tape anywhere. Boot-to-sheetrock gaps sealed; leakage-tested where the jurisdiction requires a duct blaster number.
- ☐ **Flex duct pulled tight, supported per spec, no crushed or kinked runs**
Sags between straps beyond allowable, sharp bends at boots, and crushed runs over truss chords all show up as weak rooms at balancing. Fix them before the test.
- ☐ **Registers and grilles installed, level, correct throw direction, dampers operable**
No drywall gaps at the flanges, ceiling diffusers throwing along the right axis, every damper lever reachable and moving.
- ☐ **Return paths verified: transfer grilles, undercuts, jump ducts as designed**
Close every bedroom door and confirm the return path exists. Starved returns are the root of half the "this room is always hot" calls.
- ☐ **Filter rack accessible, correct size labeled, clean filter installed at turnover**
Construction filter swapped for new, size written on the rack or closet door, access door gasketed and latching, spare size noted in the closeout docs.
- ☐ **Bath, kitchen, and dryer exhausts ducted to exterior, dampers free**
No terminations in the attic or soffit cavity, backdraft dampers swinging free, dryer duct smooth-wall and cleaned of construction debris.
- ☐ **Duct insulation complete in unconditioned space, vapor barrier intact**
R-value per code for attic and crawl runs, no bare metal at takeoffs, torn jacket taped, plenum insulation not blocking service access.

Thermostats & Controls

- ☐ **Thermostats level, on interior walls, away from supplies and sun**
Not above a register, not on a chase that gets sun-load, height per plan or ADA where it applies. A bad sensor location bakes in comfort complaints forever.
- ☐ **Thermostats configured for the actual equipment and programmed**
Heat pump vs conventional, stages, aux lockout, fan profiles set. Wi-Fi stats joined to the owner network at walkthrough or handed over with pairing instructions.
- ☐ **Heating and cooling verified from every thermostat, staging confirmed**
Call for heat, feel heat. Call for cool, feel cool. Confirm second stages and aux heat engage; reversing valve energizing per the O and B setting, not fighting it.
- ☐ **Zone dampers stroke fully, zones respond only to their own thermostat**
Command each zone individually and watch damper end-switches. Bypass damper or relief strategy set so static stays in range with one zone calling.
- ☐ **Safety switches proven: float switches, limits, pressure switches, rollout**
Trip each one and watch the equipment respond. A float switch that was never tested is just decorative PVC.

- ☐ **Condensate pumps run, check valves hold, alarm contacts wired**
Fill the reservoir and watch a full cycle; safety contact actually stops the call for cool instead of politely doing nothing.

Startup, Balancing & Closeout

- ☐ **Manufacturer startup checklist completed and on file per unit**
Every commissioning field filled in with real readings, not checkmarks. Most warranty claims start with "send us the startup report."
- ☐ **Charge verified by subcooling or superheat and recorded**
Weigh-in plus line-length trim, verified against nameplate subcooling target at steady state. "Beer-can cold" is not a commissioning method.
- ☐ **Supply/return temperature split within expected range each system**
Roughly 18 to 22F on cooling at design-ish conditions; log the numbers. Out-of-range splits point at charge, airflow, or duct leakage before the owner feels it.
- ☐ **Total external static measured and within blower rating**
Probe supply and return sides, record TESP. High static means duct or filter problems that will eat blower motors; fix the cause, not the symptom.
- ☐ **Room-by-room airflow balanced to design CFM within tolerance**
Flow-hood the registers and set dampers to hit design within 10 percent, then mark damper positions. Attach the balance report on commercial work.
- ☐ **Combustion analysis run on gas equipment, readings recorded**
O2, CO, and flue temp captured with an analyzer at high and low fire; gas pressure clocked and manifold pressure set to nameplate.
- ☐ **No abnormal noise or vibration: isolators seated, panels tight, lineset not rattling**
Run every unit through a full cycle and listen. Panel buzz, lineset against framing, and duct oil-canning are punch items now, warranty calls later.
- ☐ **Units, disconnects, filters, and dampers labeled; refrigerant type marked**
System 1 vs System 2 labels matching the thermostats, filter sizes at the rack, damper positions marked post-balance, lockout-tagout points identified on commercial.
- ☐ **Protective film off registers and equipment, work areas cleaned**
Film and stickers off diffusers and stat faces, attic and closet swept of duct scraps and screws, cardboard hauled off, mastic smears cleaned from finishes.
- ☐ **Final inspection passed; warranties registered and O&M package delivered**
AHJ final signed off, equipment registered for the extended warranty window (most brands give you 60 to 90 days), manuals, startup and balance reports handed over.