

HVAC Project Checklist

Use this worksheet to prepare for estimates, compare proposals, and document the final handoff. Requirements vary by project and location.

Before requesting quotes

- ☐ Define the project scope in writing
- ☐ Compare at least three detailed quotes
- ☐ Request equipment sizing documentation
- ☐ Compare efficiency ratings

Before signing

- ☐ Confirm the written scope, products, allowances, exclusions, and payment schedule
- ☐ Ask who obtains permits and schedules inspections
- ☐ Request proof of applicable insurance and licensing
- ☐ Document how changes and hidden conditions will be priced

Before work begins

- ☐ Photograph the work area and protect belongings
- ☐ Confirm site access, work hours, cleanup, and debris removal
- ☐ Record selected products, model numbers, colors, and warranties
- ☐ Identify the daily contact and emergency procedure

At final handoff

- ☐ Walk through the completed work before final payment
- ☐ Collect permit approvals, warranties, manuals, and lien releases where applicable
- ☐ Photograph the completed project and note punch-list items
- ☐ Schedule recommended maintenance and keep extra materials

Planning note: This checklist is general information and does not replace project-specific advice, contracts, permits, inspections, or licensed professional services.