

YOUR LOGO HERE	HVAC · SERVICE WORK ORDER HVAC Service Work Order For demand, maintenance, install, warranty, and callback calls. Record readings before and after repair.	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th colspan="2" style="background-color: #1a2b4a; color: white; padding: 5px;">WORK ORDER #</th> </tr> <tr> <td colspan="2" style="height: 40px;"></td> </tr> <tr> <td style="width: 50%; padding: 5px;">DATE OF SERVICE</td> <td style="width: 50%; padding: 5px;">INVOICE #</td> </tr> </table>	WORK ORDER #				DATE OF SERVICE	INVOICE #
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COMPANY LICENSE # / PHONE								

A Customer & site

CUSTOMER NAME	COMPANY	ACCOUNT #	PO / AUTHORIZATION #
BILLING CONTACT	PHONE	EMAIL	SITE CONTACT & PHONE
SERVICE SITE ADDRESS		UNIT SERVED (SUITE / ZONE / TENANT)	PRIORITY
JOB TYPE ☐ Demand service ☐ Scheduled maint. ☐ Install ☐ Warranty ☐ Callback		RESPONSE WINDOW	TECHNICIAN
EPA 608 CERT TYPE & #			

B Equipment

EQUIPMENT TYPE ☐ Packaged RTU ☐ Split system ☐ Heat pump ☐ Mini-split ☐ Furnace ☐ Air handler ☐ Chiller				MANUFACTURER / BRAND	
CAPACITY (TONS / BTU/H)	VOLTAGE / PHASE	OUTDOOR UNIT MODEL #	OUTDOOR UNIT SERIAL #	INDOOR / AHU MODEL #	INDOOR / AHU SERIAL #
REFRIGERANT ☐ R-410A ☐ R-454B ☐ R-32 ☐ R-22		NAMEPLATE CHARGE (LB)	FILTER SIZE / QTY / MERV	METERING DEVICE ☐ TXV ☐ EEV ☐ Fixed orifice / piston ☐ Cap tube	
UNIT LOCATION ☐ Rooftop ☐ Mech. room ☐ Pad ☐ Attic		ACCESS NOTES		WARRANTY END: PARTS	WARRANTY END: LABOR

C Reported problem & initial assessment

REPORTED PROBLEM (CUSTOMER'S WORDS)					
SYMPTOMS ON ARRIVAL ☐ No cooling ☐ No heat ☐ Short cycling ☐ Noise ☐ Water ☐ Odor				ACTIVE FAULT CODES / ALARMS	
THERMOSTAT TYPE	SET POINT	SPACE TEMP	MODE TESTED ☐ Cooling ☐ Heating ☐ Fan ☐ Defrost		CALL FOR STAGE(S)
FILTER CONDITION		LAST REPORTED SERVICE DATE	VISUAL: CABINET, COILS, DRAIN PAN, WIRING		

D Refrigerant circuit readings

Reading	Target	Measured
Outdoor ambient (°F)		
Indoor return wet-bulb / dry-bulb (°F)		
Suction pressure (psig)		
Saturated suction temp (°F)		
Discharge pressure (psig)		
Saturated condensing temp (°F)		
Suction line temp (°F)		
Superheat, calculated (°F)		
Liquid line temp (°F)		
Subcooling, calculated (°F)		
Compressor running amps vs. RLA (A)		
Compressor LRA on start (A)		
Condenser fan motor (A)		
Indoor blower motor (A)		
Run / start capacitor (µF)		
Evaporator approach / coil delta-T (°F)		

E Airflow, combustion & electrical

Reading	Target	Measured
Total external static (in. w.c.)		
Supply air temp (°F)		
Return air temp (°F)		
Supply / return delta-T (°F)		
Heating temp rise (°F)		
Gas inlet pressure (in. w.c.)		
Gas manifold pressure (in. w.c.)		
Flue O ₂ / CO ₂ (%)		
Flue CO (ppm)		
Stack temp (°F)		
Flame sensor (µA)		
Voltage L-L / L-N (V)		
Voltage drop under load (V)		

Targets: superheat and subcooling per metering device and manufacturer charging chart; compressor amps vs. nameplate RLA; capacitor vs. rated µF; total external static vs. design (≈0.5 in. w.c. is a commonly cited starting point); heating temperature rise within the furnace nameplate range. Always verify against the manufacturer's specifications for the specific unit.

Refrigerant recordkeeping varies by refrigerant type and appliance charge under EPA Section 608 and the AIM Act; only EPA 608-certified technicians may open the refrigerant circuit. Verify requirements with your AHJ. This form is a starting point and does not replace procedures performed by qualified personnel.

F Component condition

Component	Pass	Fail	N/A
Contactator	☐	☐	☐
Reversing valve	☐	☐	☐
Crankcase heater	☐	☐	☐
Ignitor / inducer operation	☐	☐	☐
Heat exchanger (cracks, corrosion, soot)	☐	☐	☐
Condensate drain flow & trap	☐	☐	☐
Float switch	☐	☐	☐
Drain pan	☐	☐	☐
Belt, bearings & sheave alignment	☐	☐	☐
Economizer / damper operation	☐	☐	☐

G Refrigerant tracking

EPA 608 / AIM Act

REFRIGERANT ADDED: TYPE	AMOUNT ADDED (LB / OZ)	CYLINDER LOT / ID
REFRIGERANT RECOVERED: TYPE	AMOUNT RECOVERED (LB / OZ)	RECOVERY CYLINDER ID
FULL CHARGE OF APPLIANCE (LB)	CALCULATED LEAK RATE (%)	LEAK TEST RESULT
LEAK INSPECTION METHOD ☐ Electronic ☐ Bubble ☐ UV ☐ N ₂ / standing pressure		
LEAK LOCATION(S)	REPAIR DONE OR FOLLOW-UP SCHEDULED	
VERIFICATION LEAK TEST & RESULT		CERTIFIED RECOVERY EQUIPMENT
RECOVERY / RECLAIM DISPOSITION		

H Diagnosis & work performed

ROOT CAUSE / FAILURE IDENTIFIED	CORRECTIVE WORK PERFORMED THIS VISIT
COMPONENTS TESTED, CLEANED, ADJUSTED, OR REPLACED	CONDITIONS OUTSIDE SCOPE OR REQUIRING SHUTDOWN / LOCKOUT
VERIFICATION ☐ System performance re-verified after repair (readings re-checked) ☐ Before & after photos taken and attached	

I Parts & materials

Qty	Part #	Description	Source: truck / supplier / warranty / customer	Unit price	Line total

J Labor

Technician	Arrive	Depart	Time on site	Reg. hrs	OT hrs	Rate	Labor total

K Recommended repairs & quoted work

Customer marks each item.

Recommended repair / replacement	Priority	Quoted \$	Approved	Declined
			☐	☐
			☐	☐
			☐	☐
			☐	☐

L Summary of charges

Charge	Amount
Parts	
Materials & shop supplies	
Labor	
Trip / diagnostic fee	
Tax	
Total	

M Results & recommendations

EQUIPMENT LEFT ☐ Operational ☐ Partially operational ☐ Down		REASON (IF NOT FULLY OPERATIONAL)	
OPEN DEFICIENCIES & SAFETY CONCERNS			
RECOMMENDED NEXT MAINTENANCE VISIT		PAYMENT METHOD / TERMS	
		OFFICE REVIEW (INITIALS / DATE)	
CUSTOMER SIGNATURE (WORK & CHARGES AUTHORIZED)		TECHNICIAN SIGNATURE & EPA CERT #	
PRINT NAME DATE		PRINT NAME DATE	