

FIELD PROMAX

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QA Inspection Checklist Templates

A 5-phase QA framework for HVAC, plumbing, electrical, and general field service shops.
Build these checklists into every work order so jobs can't close without them.

INCLUDED TEMPLATES

- 01** General Service
- 02** HVAC (Heating & Cooling)
- 03** Plumbing (Water & Gas)
- 04** Electrical (NEC Compliant)

Pro tip: In Field Promax, these checklists live inside every work order.
A job can't close until required steps are marked complete.

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General Service QA Inspection Checklist

QA Standard | All Trades | fieldpromax.com/work-orders

TECHNICIAN NAME	DATE	WORK ORDER / JOB #
CUSTOMER NAME	SERVICE ADDRESS	

1

PHASE 1: PRE-JOB CHECKS

- ☐ Work order details, site address, and customer notes confirmed accurate
- ☐ Required parts and tools verified on truck
- ☐ Access information confirmed (codes, keys, gate, lockbox)
- ☐ Safety requirements reviewed for this job type
- ☐ Customer contact reached / arrival time confirmed

2

PHASE 2: TASK-SPECIFIC STEPS

- ☐ All trade-specific steps completed per work order scope
- ☐ Equipment operated per manufacturer spec and applicable code
- ☐ All connections torqued and verified
- ☐ Required readings taken and documented
- ☐ Any deferred items or additional parts noted in work order

3

PHASE 3: LAST-STEP QUALITY CONTROL

- ☐ Functional test under load completed with customer present
- ☐ Inspection for leaks, unusual noise, or fault codes - none found
- ☐ All panels, covers, and access points secured
- ☐ Work area cleaned - no debris, tools, or materials left behind
- ☐ Any safety hazards identified and addressed or flagged

4

PHASE 4: DOCUMENTATION

- ☐ Before/after photos captured and attached to work order
- ☐ All readings and measurements logged in work order

- ☐ Risks, deferred items, and follow-up recommendations documented
- ☐ Customer signature obtained on work order
- ☐ Work order status updated to complete in Field Promax app

5 PHASE 5: CUSTOMER HANDOFF

- ☐ Work explained to customer in plain language
- ☐ Equipment or system operation demonstrated where applicable
- ☐ Maintenance recommendations provided
- ☐ Customer confirmed satisfied before leaving site
- ☐ Next service interval or maintenance plan discussed

NOTES / DEFERRED ITEMS / UPSELL OPPORTUNITIES

Technician Sign-Off

Signature / Date

Customer Sign-Off

Signature / Date

HVAC QA Inspection Checklist

QA Standard | Heating & Cooling | fieldpromax.com/work-orders

TECHNICIAN NAME	DATE	WORK ORDER / JOB #
CUSTOMER NAME	SERVICE ADDRESS	

1

PHASE 1: PRE-JOB CHECKS

- ☐ Work order reviewed - job type, equipment model, customer notes confirmed
- ☐ Refrigerant, parts, and tools verified on truck
- ☐ EPA Section 608 requirements reviewed for this job type
- ☐ Access to equipment confirmed (attic, closet, roof, mechanical room)
- ☐ Permit status confirmed for permitted installs

2

PHASE 2: TASK-SPECIFIC STEPS (HVAC)

- ☐ Refrigerant charge documented per EPA 608 (type, amount, pressure readings)
- ☐ Airflow tested at supply and return registers - within spec
- ☐ Condensate drain cleared and tested for full flow
- ☐ Static pressure measured and recorded
- ☐ Filter inspected / replaced - size and type logged
- ☐ Manual J load verified on new installs
- ☐ Capacitors, contactors, and electrical components tested

3

PHASE 3: LAST-STEP QUALITY CONTROL

- ☐ Full heating or cooling cycle run with customer present
- ☐ Temperature differential confirmed within spec at 10-15 min run time
- ☐ No unusual sounds, vibrations, or fault codes
- ☐ Drain pan dry - no standing water or overflow
- ☐ All panels, screws, and covers secured

4

PHASE 4: DOCUMENTATION

- ☐ Pressure gauge readings photographed and attached to work order
- ☐ Before/after filter photo captured
- ☐ Refrigerant log updated in work order
- ☐ EPA 608 documentation completed for refrigerant work
- ☐ Customer signature obtained on work order

5 PHASE 5: CUSTOMER HANDOFF

- ☐ Customer shown thermostat operation and settings confirmed
- ☐ Filter replacement schedule provided (size, frequency, brand)
- ☐ Any identified issues beyond scope documented and quoted
- ☐ Customer confirmed satisfied - system operating as expected
- ☐ Maintenance plan or next service interval discussed

NOTES / DEFERRED ITEMS / UPSELL OPPORTUNITIES

Technician Sign-Off

Signature / Date

Customer Sign-Off

Signature / Date

Plumbing QA Inspection Checklist

QA Standard | Water & Gas | fieldpromax.com/work-orders

TECHNICIAN NAME	DATE	WORK ORDER / JOB #
CUSTOMER NAME	SERVICE ADDRESS	

1

PHASE 1: PRE-JOB CHECKS

- ☐ Work order reviewed - job type, fixture type, customer notes confirmed
- ☐ Required pipe, fittings, and parts verified on truck
- ☐ Main shutoff and zone shutoff locations confirmed
- ☐ Permit status confirmed for permit-required work
- ☐ Safety requirements reviewed (gas work, LOTO, confined space if applicable)

2

PHASE 2: TASK-SPECIFIC STEPS (PLUMBING)

- ☐ Pressure test completed before any wall or floor concealment
- ☐ Pipe slope verified (1/4 inch per foot minimum on drain lines)
- ☐ All fittings torqued to spec - no over-tightening on plastic
- ☐ Water heater: thermostat set, TPR valve installed and tested, first cycle run
- ☐ Gas lines: pressure tested and leak-checked with detector
- ☐ Drain clearance: full flow confirmed, footage / method logged
- ☐ Permit inspection scheduled where required

3

PHASE 3: LAST-STEP QUALITY CONTROL

- ☐ Pressure gauge reading photographed at test pressure
- ☐ Flow rate test at fixture - confirmed normal flow
- ☐ 5-minute drip check at all new connections - none found
- ☐ All shutoff valves operational and returned to correct position
- ☐ Area dry - no water on floor, cabinet, or walls

4

PHASE 4: DOCUMENTATION

- ☐ Pressure gauge photo captured and attached to work order
- ☐ Before/after photos at fixture and connection points
- ☐ Cable footage or camera footage log for drain work
- ☐ Permit number logged in work order if applicable
- ☐ Customer signature obtained on work order

5 PHASE 5: CUSTOMER HANDOFF

- ☐ Customer shown location of main shutoff and relevant zone shutoffs
- ☐ Water heater controls explained (temperature, pilot, reset)
- ☐ Any deferred issues documented - written quote provided or offered
- ☐ Customer confirmed no leaks visible and system operating normally
- ☐ Customer confirmed satisfied before leaving site

NOTES / DEFERRED ITEMS / UPSELL OPPORTUNITIES

Technician Sign-Off

Signature / Date

Customer Sign-Off

Signature / Date

Electrical QA Inspection Checklist

QA Standard | NEC Compliant | fieldpromax.com/work-orders

TECHNICIAN NAME	DATE	WORK ORDER / JOB #
CUSTOMER NAME	SERVICE ADDRESS	

1

PHASE 1: PRE-JOB CHECKS

- ☐ Work order reviewed - circuit type, panel location, customer notes confirmed
- ☐ LOTO (lockout/tagout) procedure confirmed per OSHA 1910.147
- ☐ Permit status confirmed for permit-required electrical work
- ☐ Wire gauge, breaker size, and device specifications verified
- ☐ PPE and test equipment confirmed functional (multimeter, GFCI tester, toner)

2

PHASE 2: TASK-SPECIFIC STEPS (ELECTRICAL)

- ☐ Continuity tested on all new wiring before energizing
- ☐ NEC 110.14 torque specs verified on all breaker and terminal connections
- ☐ Wire gauge confirmed correct for circuit ampacity
- ☐ GFCI protection confirmed on all required circuits (bath, kitchen, garage, outdoor)
- ☐ AFCI protection confirmed on bedroom circuits (post-2008 installs)
- ☐ Grounds and neutrals verified at all boxes and devices
- ☐ No open junction boxes - all covers secured

3

PHASE 3: LAST-STEP QUALITY CONTROL

- ☐ GFCI trip-and-reset confirmed at every protected outlet on this circuit
- ☐ Load test completed - circuit operating at full rated load
- ☐ Panel labeled accurately - every slot labeled before cover replaced
- ☐ Panel photo captured showing completed, accurate breaker labels
- ☐ No warm breakers, no tripped breakers, no unusual sounds at panel

4

PHASE 4: DOCUMENTATION

- ☐ Panel photo with completed labels attached to work order
- ☐ GFCI test confirmation photo (tester showing trip status)
- ☐ Permit number and inspection date logged if applicable
- ☐ Load test readings logged for commercial or high-ampacity work
- ☐ Customer signature obtained on work order

5 PHASE 5: CUSTOMER HANDOFF

- ☐ Breaker panel location and labeling explained to customer
- ☐ New devices or controls demonstrated - customer confirmed able to operate
- ☐ GFCI reset button locations shown for all protected circuits
- ☐ Any code-related observations (older wiring, missing AFCI) documented
- ☐ Customer confirmed satisfied and all outlets/devices operational

NOTES / DEFERRED ITEMS / UPSELL OPPORTUNITIES

Technician Sign-Off

Signature / Date

Customer Sign-Off

Signature / Date