

HVAC and Air Conditioning Maintenance

Service visit record for air conditioning, heat pumps, ventilation and air handling units. Unit by unit checks, refrigerant and F gas leak checks, parts used and sign-off.

1. Job details

The job, the site and the main system.

Project

Filled in from the project in SiteSurvey.

Job or work order reference

Customer

Site *

Address

Date of visit *

Arrival time

Type of visit * (choose one)

☐ Planned service ☐ Reactive call-out ☐ Return visit for a defect

Which planned service is this? (if applicable; choose one)

☐ Monthly ☐ Quarterly ☐ Six monthly ☐ Annual

What was reported, and by whom? (if applicable)

Reference of the earlier job (if applicable)

Manufacturer of the main system

Leave blank if the units are from different makers. Record each unit on page 3.

Model

Serial number

Date of the last air conditioning energy inspection (TM44), if the system is over 12 kW

Days since the last energy inspection (if applicable; worked out automatically in the app)

If applicable: Energy inspection may be overdue. The Energy Performance of Buildings (England and Wales) Regulations 2012 require air conditioning systems with an effective rated output over 12 kW to have an energy inspection by an accredited assessor at intervals of no more than 5 years. CIBSE TM44 is the method used. Tell the customer.

Engineer name

Does any of the work need a permit from the site?

☐ Yes ☐ No

Which permits? (if applicable; tick all that apply)

☐ Roof access

☐ Electrical isolation

☐ Hot work

☐ Confined space

☐ Other: _____

Permit references (if applicable)

2. F gas competence and site

Certificates for the work, and where the site is.

Where is the site? (choose one)

☐ England, Scotland or Wales ☐ Northern Ireland

If applicable: Great Britain. The F gas notes in this form follow the rules as they apply in Great Britain: Regulation (EU) No 517/2014 as retained in GB law, with the Fluorinated Greenhouse Gases Regulations 2015.

If applicable: Northern Ireland. Northern Ireland is part of the EU F gas system, so the Great Britain notes in this form may not match the rules there. Check the current EU requirements for this site.

Does the engineer hold a personal F gas certificate for stationary refrigeration, air conditioning and heat pumps? *

☐ Yes ☐ No

Certificate category (if applicable; choose one)

☐ Category 1 ☐ Category 2 ☐ Category 3 ☐ Category 4

Certificate number (if applicable)

If applicable: What each category covers. Category 1 covers all activities. Category 2 covers installing, maintaining, servicing and recovering refrigerant on systems with less than 3kg of F gas, or less than 6kg if hermetically sealed. Category 3 covers recovery only on those smaller systems. Category 4 covers leak checks that do not break into the refrigeration circuit.

If applicable: No F gas certificate. It is against the law to work on equipment containing F gas without the correct qualification. Do not check for leaks, recover gas or work on the refrigerant circuit. Record the non refrigerant checks only and book a certified engineer.

Is the company certified to work on F gas equipment for others?

☐ Yes ☐ No

Certification body (if applicable; choose one)

☐ Refcom ☐ F-Gas Register (Quidos) ☐ Bureau Veritas ☐ Other: _____

Company certificate number (if applicable)

If applicable: A company, including a sole trader, that installs, repairs, maintains or decommissions stationary air conditioning, refrigeration or heat pump equipment operated by others must be certified by an approved body. A company servicing only its own equipment does not need company certification.

Is there a cooling tower or evaporative condenser on this site?

☐ Yes ☐ No

If applicable: Cooling towers and evaporative condensers. The Notification of Cooling Towers and Evaporative Condensers Regulations 1992 require the person in control of the premises to notify the local authority in writing of these devices. HSE guidance is that they need measures to prevent or control the risk of legionella (see HSE L8). This form does not cover that work.

Has the client told you the devices are notified to the local authority? (if applicable)

☐ Yes ☐ No

3. Unit by unit record

One entry for each unit. Checks, temperatures, refrigerant and leak check.

What a good photo shows. Stand back to show the whole unit and its rating label, so the refrigerant and charge can be read. Then photograph any defect close up.

Units by plant room or area (copy this block for each one)

Plant room, floor or area *

For example Roof plant area or Second floor

Units in this area (copy this block for each one)

Type of unit * (choose one)

- ☐ Split or multi-split air conditioning
- ☐ VRF or VRV system
- ☐ Packaged unit
- ☐ Air handling unit
- ☐ Fan coil unit
- ☐ Heat pump
- ☐ Mechanical ventilation or MVHR
- ☐ Chiller

Unit or asset reference

Position in this area

Is this unit on the roof or outside?

☐ Yes ☐ No

Where is the unit? (if applicable)

Mark it standing beside the unit, so the next engineer finds the right one on a busy roof. Tap Mark current location at the unit. It saves the coordinates, a grid reference and the accuracy.

Manufacturer

Model

Serial number

Photos before the work (photos: attach, or note the file names)

Filters (choose one)

☐ Cleaned ☐ Replaced ☐ Checked, no action needed ☐ No access

Coils (choose one)

☐ Clean ☐ Cleaned on this visit ☐ Dirty, needs a deeper clean ☐ Damaged

Condensate drain and pump (choose one)

☐ Clear ☐ Cleared on this visit ☐ Blocked or leaking ☐ Not applicable

If applicable: Condensate problem. A blocked drain or failed pump can overflow onto ceilings and electrics.

Fans and belts (choose one)

☐ Satisfactory ☐ Adjusted ☐ Belt replaced ☐ Defect found ☐ Not applicable

Electrical connections and controls (choose one)

☐ Satisfactory ☐ Connections tightened ☐ Defect found

Supply air or flow temperature (°C)

Return air or return temperature (°C)

Temperature difference, return minus supply (°C) (if applicable; worked out automatically in the app)

Expected difference, lowest (°C)

From the commissioning record or the maker's data for this mode. The form compares the reading with it; it sets no figure.

Expected difference, highest (°C)

Difference against the expected range (if applicable; worked out automatically in the app)

Does this unit hold F gas refrigerant?

☐ Yes ☐ No

Refrigerant, from the label (if applicable)

Charge (kg) (if applicable)

Global warming potential of the gas (if applicable)

From the label or the data sheet.

Carbon dioxide equivalent (tonnes) (if applicable; worked out automatically in the app)

Is the unit labelled as hermetically sealed? (if applicable)

☐ Yes ☐ No

Is a leak detection system fitted? (if applicable)

☐ Yes ☐ No

If applicable: Under 5 tonnes. The F gas rules do not require leak checks for this unit.

If applicable: Hermetically sealed and under 10 tonnes. The F gas rules do not require leak checks for this unit, as long as it is labelled as hermetically sealed.

If applicable: 5 tonnes or more, under 50. Leak checks are due at least once every 12 months, or every 24 months where a leak detection system is fitted.

If applicable: 50 tonnes or more, under 500. Leak checks are due at least once every 6 months, or every 12 months where a leak detection system is fitted.

If applicable: 500 tonnes or more. Leak checks are due at least once every 3 months, or every 6 months with a leak detection system. Equipment of this size must have a leak detection system that alerts the operator or a service company.

Date of the previous leak check, from the F gas record (if applicable)

Days since the previous leak check (if applicable; worked out automatically in the app)

Was a leak check done on this visit? (if applicable)

☐ Yes ☐ No

Leak check method (if applicable; choose one)

☐ Direct: electronic detector or bubble solution

☐ Indirect: system parameters

☐ Leak detection system

Result of the leak check (if applicable; choose one)

☐ No leak found ☐ Leak found and repaired ☐ Leak found, repair still needed

Where was the leak? (if applicable)

If applicable: Leak found. The operator must have the leak repaired without undue delay. Where the unit is subject to leak checks, a certified person must check it within one month of the repair to confirm the repair worked.

Refrigerant added (kg) (if applicable)

Refrigerant recovered (kg) (if applicable)

Photos after the work (photos: attach, or note the file names)

Any defects on this unit?

☐ Yes ☐ No

Describe the defect (if applicable)

Priority (if applicable; choose one)

☐ Routine, at the next service ☐ Soon, before the next service ☐ Urgent

How was the unit left? (choose one)

☐ Running normally ☐ Running with a defect ☐ Isolated and labelled out of use

This plant room or area: units serviced (worked out automatically in the app)

This plant room or area: units with a leak still to repair (worked out automatically in the app)

This plant room or area: units outside the expected temperature difference (worked out automatically in the app)

This plant room or area: urgent defects (worked out automatically in the app)

This plant room or area: soon (worked out automatically in the app)

This plant room or area: routine (worked out automatically in the app)

This plant room or area: units left isolated (worked out automatically in the app)

Units serviced (worked out automatically in the app)

Units with a leak still to repair (worked out automatically in the app)

Units outside the expected temperature difference (worked out automatically in the app)

Urgent defects (worked out automatically in the app)

Soon (worked out automatically in the app)

Routine (worked out automatically in the app)

Units left isolated (worked out automatically in the app)

If applicable: An urgent defect or an isolated unit. Make sure the customer knows before you leave, and record who was told on the sign-off page.

4. F gas records

What has been recorded for the operator.

Have the F gas records been updated for every unit that needs them?

☐ Yes ☐ No

Who holds the F gas records for this site?

F gas records. For equipment that needs leak checks, the operator must keep records of the type and quantity of gas installed and added, the gas recovered, who installed or serviced it, and the dates and results of the leak checks, for at least 5 years. A company doing the work for an operator keeps copies for 5 years too.

If applicable: The records have not been updated. Give the client the refrigerant, charge, leak check result and any gas added or recovered from this form so they can add them.

5. Outcome and parts

How the visit ended and what was used.

Outcome of the visit * (choose one)

- ☐ All units serviced and working
☐ Serviced, defects to follow up
☐ Not completed

What needs doing next, and why? (if applicable)

If applicable: At least one unit has a leak still to repair. Make sure the client knows and a repair visit is booked.

Recommendations

Did you use any parts or materials?

☐ Yes ☐ No

Parts and materials used (copy this block for each one; if applicable)

Item

Part number

Quantity

Next service due

Days until the next service (if applicable; worked out automatically in the app)

Departure time

6. Sign-off

The customer signs for the visit. The engineer signs for the work.

Is the customer or their representative available to sign?

☐ Yes ☐ No

Why not, and who will you send the report to? (if applicable)

Customer name (if applicable)

Position (if applicable)

Customer comment (if applicable)

Customer signature (if applicable)

Engineer name

Engineer signature