

# HVAC Inspection Workflow Management: Digital Compliance For Commercial Buildings



**Start**

Start of the Workflow/Process.

**1. Get Inspection Site Details**

Retrieves key data points for the inspection, such as building address, unit ID, and service history from the Asset Register.

**2. Assign Inspection Task to Technician**

Automatically creates a new inspection task assigned to the relevant HVAC technician based on the asset type and location.

**3. New Inspection Checklist Submission**

Allows the technician to create a new inspection record, capturing date, initial observations, and general details.

**4. Retrieve Required Inspection Standards**

Fetches the latest necessary inspection checklists and safety guidelines applicable to the specific HVAC equipment model.

### **5. Update Inspection Findings (Pass/Fail)**

Technician updates the status (Pass/Fail/Needs Repair) and inputs specific readings for each checklist item.

### **6. Calculate Overall Deficiency Score**

Executes a formula to score the inspection based on critical failures and outstanding items (e.g., weighted failure points).

### **7. Generate Follow-Up Action Task**

Creates a subsequent task for the maintenance team if any deficiencies are found, detailing required corrective actions.

### **8. Notify Client of Inspection Completion**

Sends an automated summary email to the facility manager upon submission, attaching the preliminary report.

### **9. Aggregate Inspection Metrics**

Calculates average maintenance frequency, total findings count, or percentage of assets inspected this quarter.

### **10. Generate Final Compliance Report**

Compiles all data (inputs, calculations, actions) into a comprehensive, branded, and shareable PDF report.

### **End**

Start of the Workflow/Process.