



# HVAC System Performance - Retail Zones Checklist

## General Zone Observations

Initial assessment of the retail zone environment, identifying any obvious issues.

### Overall Zone Comfort Assessment

Write something...

### Zone Temperature (Current)

Enter a number...

### Visible Signs of Condensation?

- ☐ Yes
- ☐ No
- ☐ Unsure

### Describe Any Unusual Noises from Equipment

Write something...

### Any Obvious Signs of Drafts?

- ☐ Yes
- ☐ No
- ☐ Unsure

### Notes on Occupancy Levels & Activities

Write something...

## Temperature & Humidity

Verification of temperature and humidity levels against setpoints and comfort requirements.

### Zone Temperature (Current)

Enter a number...

### Zone Temperature (Set Point)

Enter a number...

### Humidity (Current)

Enter a number...

### Humidity (Set Point)

Enter a number...

### Temperature Comfort Level

- ☐ Excellent
- ☐ Good
- ☐ Acceptable
- ☐ Uncomfortable

### Humidity Comfort Level

- ☐ Excellent
- ☐ Good
- ☐ Acceptable
- ☐ Uncomfortable

### Notes on Temperature/Humidity Discrepancies

Write something...

### Date of Temperature/Humidity Reading

Enter date...

### Time of Temperature/Humidity Reading

## Airflow & Distribution

Assessment of airflow patterns and uniformity within the retail zone.

### Supply Air Temperature (SAT) - Zone 1 (°F)

Enter a number...

### Return Air Temperature (RAT) - Zone 1 (°F)

Enter a number...

### Measured Air Velocity at Diffuser 1 (ft/min)

Enter a number...

### Diffuser Orientation - Diffuser 1

- ☐ Upward
- ☐ Downward
- ☐ Horizontal
- ☐ Adjustable

### Airflow Issues Observed (Check all that apply)

- ☐ Drafts
- ☐ Uneven Temperature
- ☐ Stagnant Air
- ☐ Noise
- ☐ None

### Detailed Description of Airflow Issues (if any)

Write something...

## Location of Most Significant Airflow Issue

 [Set My Current Location](#)



## Equipment Performance - Cooling

Specific checks on cooling equipment components and performance.

### Supply Air Temperature (°F)

Enter a number...

### Return Air Temperature (°F)

Enter a number...

### Chilled Water Supply Temperature (°F)

Enter a number...

### Chilled Water Return Temperature (°F)

Enter a number...

### Condenser Water Temperature (°F)

Enter a number...

### Refrigerant Pressure (High Side) (PSI)

Enter a number...

### Refrigerant Pressure (Low Side) (PSI)

Enter a number...

### Compressor Operating Status

- ☐ On
- ☐ Off
- ☐ Cycling
- ☐ Fault

### Notes on Compressor Performance (e.g., unusual noises, vibrations)

Write something...

## Equipment Performance - Heating

Specific checks on heating equipment components and performance (seasonal).

### **Furnace Supply Air Temperature (Actual)**

Enter a number...

### **Furnace Return Air Temperature (Actual)**

Enter a number...

### **Furnace Discharge Air Temperature (Actual)**

Enter a number...

### **Heating System Pressure (PSIG)**

Enter a number...

### **Heating System Amperage Draw**

Enter a number...

### **Flame Sensor Condition**

- ☐ Good
- ☐ Dirty/Contaminated
- ☐ Damaged
- ☐ N/A (No Flame Sensor)

### **Date of Last Heating System Maintenance**

Enter date...

### Notes on Heating System Performance/Observations

Write something...

## Ventilation & Air Quality

Evaluation of ventilation rates and indoor air quality.

### Outdoor Air Intake Damper Position (%)

Enter a number...

### Exhaust Fan RPM (if applicable)

Enter a number...

### Visible signs of mold or mildew?

- ☐ Yes
- ☐ No
- ☐ Unsure

### Describe any unusual odors detected.

Write something...

### CO2 Levels (ppm)

Enter a number...



### Supply Air Filter Condition

- ☐ New
- ☐ Acceptable
- ☐ Needs Replacement
- ☐ Severely Dirty

### Notes on ventilation system performance or unusual readings.

Write something...

## Energy Efficiency & Controls

Review of energy consumption and control system effectiveness.

### Zone Energy Consumption (kWh/month)

Enter a number...

### Overall HVAC System Efficiency (EER/SEER/COP)

Enter a number...

### Control System Schedule Verification

- ☐ Schedule Adhered To
- ☐ Schedule Deviation - Minor
- ☐ Schedule Deviation - Significant

### Demand Response Program Enrollment

- ☐ Enrolled and Active
- ☐ Enrolled but Inactive
- ☐ Not Enrolled

### Notes on Control System Performance and Recommendations

Write something...

### Variable Frequency Drive (VFD) Status (if applicable) - % Operating Speed

Enter a number...

### Economizer Functioning (if applicable)

- ☐ Functioning Correctly
- ☐ Not Functioning
- ☐ Needs Adjustment

### Date of Last Control System Optimization Review

Enter date...

## Maintenance & Operational Records

Verification of maintenance records and operational history.

### Last Filter Change Date

Enter date...

**Filter Change Mileage/Operating Hours**

Enter a number...

**Last Coil Cleaning Date**

Enter date...

**Summary of Recent Maintenance Activities**

Write something...


**Equipment Runtime Hours (Since Last Maintenance)**

Enter a number...

**Maintenance Log Completeness**

- ☐ Complete and Up-to-Date
- ☐ Mostly Complete
- ☐ Incomplete

**Upload Relevant Maintenance Reports**

 Upload File

**Any Notable Issues Reported in Maintenance Logs?**

Write something...