



**INSTALLATION AND STARTUP CHECKLIST**

CUSTOMER: \_\_\_\_\_ JOB NAME: \_\_\_\_\_  
 ADDRESS: \_\_\_\_\_ LOCATION: \_\_\_\_\_  
 PHONE: \_\_\_\_\_ CUSTOMER ORDER NO: \_\_\_\_\_  
 JCI TEL NO: \_\_\_\_\_ JCI ORDER NO: \_\_\_\_\_ JCI CONTRACT NO: \_\_\_\_\_

**UNIT MODEL:** \_\_\_\_\_ **UNIT SERIAL NO:** \_\_\_\_\_  
 The work (as checked below) is in process and will be completed by: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
 Month Day Year

The following work must be completed in accordance with installation instructions:

**A. RECEIVING & INSPECTION**

- 1. Unit checked for shipping damage .....

**NOTE:** Any damage MUST be reported to Johnson Controls immediately for inspection.

Initials: \_\_\_\_\_

Company Name: \_\_\_\_\_

Date: \_\_\_\_\_

- 2. Unit arrangement/Hand correct .....
- 3. Unit received complete as ordered .....
- 4. Unit structural support complete and correct .....

**B. HANDLING & INSTALLATION**

- 1. Unit mounted level and square .....
- 2. Proper electrical service provided .....
- 3. Proper service switch/disconnect provided .....
- 4. Proper chilled water line size to unit .....
- 5. Proper refrigerant line sizes to unit .....
- 6. All services to unit in code compliance .....
- 7. Confirm no debris is left in the electric heat section .....
- 8. Damper linkage is tight and in correct position ..
- 9. Install per seismic IOM as required.....
- 10. Proper access provided for unit and accessories .....
- 11. Proper overcurrent protection provided .....
- 12. Proper hot water line to unit.....
- 13. Proper steam line sizes to unit.....

- 14. Proper steam supply pressure to unit (15psi Max) .....
- 15. All shipping screws and braces removed .....
- 16. All shipped loose parts installed .....
- 17. Installer has cleaned out interior .....
- 18. Clean air filters installed .....

**C. COOLING / HEATING CONNECTIONS**

- 1. Protect valve package components from heat....
- 2. Connect field piping to unit.....
- 3. Install drain line and traps as required .....
- 4. Install condensate pan under piping as required
- 5. Mount valve packages .....
- 6. Pressure test all piping for leaks .....
- 7. Insulate all piping as required .....

**D. DUCKWORK CONNECTIONS**

- 1. Install duckwork, fittings and grilles as required..
- 2. Control outside air for freeze protection .....
- 3. Proper supply and return grille type and size used .....
- 4. Insulate all duckwork as required.....
- 5. Verify all duckwork is complete, dampers, and filters are installed prior to startup.....

**E. ELECTRICAL CONNECTIONS**

- 1. Refer to unit wiring diagram .....
- 2. All field wiring in code compliance .....
- 3. Connect incoming power service or services .....

**F. UNIT STARTUP**

- 1. General visual unit and system inspection .....
- 2. Record ambient temperature .....
- 3. Close all unit isolation valves .....
- 4. Fill systems with water/refrigerant .....
- 5. All duckwork and grilles in place .....
- 6. Start fans, etc. ....
- 7. Check all ductwork and units for air leaks.....
- 8. Record all final settings for future use.....
- 9. Check all dampers for proper operation.....
- 10. Verify proper heating operation.....
- 11. Check all piping for leaks .....
- 12. Record electrical supply voltage .....
- 13. Check all wiring for secure connections.....
- 14. Flush water systems .....
- 15. Vent water systems.....
- 16. Vent water systems as required.....
- 17. All unit panels and filters in place.....
- 18. Check for overload condition of all units .....
- 19. Balance air systems as required.....
- 20. Check piping and ductwork for vibration .....
- 21. Verify proper cooling operation .....
- 22. Reinstall all covers and access panels .....
- 23. Check unit drain pan to confirm trap is free to drain and that unit drain pan does not hold water .....

**G. BLOWER / MOTOR**

- 1. Check Sheave set screw tightness .....
- 2. Check blower wheel set screw tightness .....
- 3. Adjust blower speed as necessary for balancing airflow .....
- 4. Check / Adjust Sheave alignment .....
- 5. Check / Adjust belt tension.....
- 6. Fan wheel properly aligned, tight on shaft and freely moving.....
- 7. Fan bearing have been re-lubricated properly....

**Owner's operating personnel:**

Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

**CONTRACTOR'S RESPONSIBILITIES AND INSTRUCTIONS TO USE FORM**

This installation checklist provides a quick way to check if all necessary installation work was completed in accordance with all applicable installation instructions. When completed, this form acts as a request for Johnson Controls to furnish start-up supervision.

Complete this form as follows:

- 1. Fill out the top of the page.
- 2. Check off each item as required. Cross out (x) items that do not apply.
- 3. Enter names, initials, and date of the operating personnel who completed the checklist.
- 4. Retain one copy in files and send one copy to customer.