

## Polestar Plumbing Service Call Standards



1. Dispatch/Technician calls customer to let them know they are on their way to customer's home.
2. Vehicles are parked on the side of the street with their vehicle in front of the homeowners' door (If possible)
3. Technician does not walk through the grass. Use the sidewalk/driveway to walk to customers ' home.
4. Technician rings the doorbell and steps away from the door and to the left or right so the customer can see them through the window.
5. Technician greets the customer, states their name, and shows them the technician badge on their uniform with their name and picture showing.
6. Technician puts on shoe covers before stepping into the customer's home.
7. If it is an installation, technician puts on shoe covers and then puts down floor runners to protect the customer's floors.
8. Technician confirms with the customer what service they will be providing.
9. Once the work is complete, the technician walks the customer through all work performed.
10. If it is an installation, the technician must complete an HVAC Installation Checklist form (see below), and a final walkthrough with the customer is done to answer any questions.
11. The technicians must take pictures of all their work and upload them into Service Titan for Management review. The technician's report requires notes on the work performed and any additional customer questions that could not be answered at the time of service.
12. The technician asks the customer if they are happy with the work performed today and if there is anything else they can do for them. The technician then asks for a 5-star review and can send a link directly to their phone via Service Titan.
13. The HVAC Manager reviews job photos, notes, and installation checklists to verify the work is complete and was done to code.
14. With large projects, the Project Manager (Sales) will follow up with the customer a day or two later to ensure they are happy and answer any additional questions.

PLUMBING • HEATING • AIR CONDITIONING

IS THE JOB COMPLETE?	YES NO	IS THE SYSTEM OPERATING PROPERLY?	YES NO	DID YOU EXPLAIN WHAT KIND OF SYSTEM YOU INSTALLED AND HOW IT OPERATES?	YES NO
IS THE GAS ON?	YES NO	DOES THE CUSTOMER HAVE HOT WATER?	YES NO		

DO WE NEED TO RETURN FOR ANY REASON?	YES NO	IF YES, EXPLAIN WHY WITH DETAIL:
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PAYMENT METHOD	BOX STORE	CHECK	CREDIT CARD	FINANCING	DID NOT COLLECT
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IF PAYMENT WAS NOT COLLECTED WHY?

DID YOU TAKE PICTURES OF THE JOB?	YES NO	IF NO, EXPLAIN WHY WITH DETAIL:
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COMPLETE	N/A	FURNACE/AIR HANDLER
		Set indoor unit on solid foundation
		Unit is straight and level and free of defects
		Unit is sealed to the return plenum
		Unit is sealed to the supply plenum
		Thermostat wire at the unit is straight, neat and properly fixed to appliance
		User manual is left between unit and return air or given to the client (Circle 1 or 2)
		Properly sized fuse/breaker has been installed
		Gas drip leg serviceable
		EVAPORATOR
		Primary drain is connected properly
		Secondary drain is connected properly (if applicable)
		Line set is insulated all the way to the coil and insulated properly
		AIR CONDITIONER/HEAT PUMP
		Set outdoor unit on firm level pad
		Heat stop paste or we rags were used to braze the fittings at condensing unit (wipe up any excess paste)
		Vacuum pulled down to 500 microns. System verified leak free
		System started and checked out
		Line set insulated to suction valve

COMPLETE	N/A	CONDENSATE AND DRAINS
		Drains are properly sloped 1/8
		Safety pan is in place and level
		Inline float switch is installed and tested
		Pan wet switch is installed and tested
		Condensate pump operation and float switch
		<b>THERMOSTAT AND CONTROLS</b>
		Thermostat was set with a 6" torpedo level to ensure proper level
		Thermostat setup/programmed properly
		<b>FLUES AND VENTING</b>
		Check all existing vents for signs of corrosion (replace as necessary)
		Type "B" vent has 1" minimum clearance to combustibles
		The Venting is securely supported as per code and manufacturers recommendation
		<b>ELECTRICAL AND SAFETY PRECATUIONS</b>
		Fuse/breaker size has been verified to protect the outdoor unit (per nameplate on the unit)
		Outdoor unit whip is secured straight and neat to the structure using one-hole type straps
		Disconnect box is level plumb and secure to the structure
		Breaker is proper size to protect the wire
		Breaker has been labeled in the panel
		Low voltage is completed
		<b>RESPECT OF THE HOME AND THE CLIENT</b>
		Drop cloths were used to protect work areas
		Shoe covers were worn to protect the floors
		Clean up debris from area of t-start, return air, under floor, attic, a/c unit, etc.
		One last walkthrough has been performed
		Before installation pictures of indoor unit and outdoor unit taken
		<b>SYSTEM STARTUP</b>
		After installation pictures of indoor unit and outdoor unit taken with client
		Furnace/Air handler with electric heat has has been run in both stages for at least 5 minutes
		Fan speed adjusted for heating and cooling
		Charge has been verified using the superheat/sub cooling method
		Refrigerant caps are tight and sealed (locking caps)

