

JOB-SITE SURVEY CHECKLIST					
Item	Description	Orientation			
		North	South	East	West
Homeowner's Requirements					
Homeowner's requirements and reason for replacement	Mainly for heating or cooling				
Indoor unit preference*	Homeowner preference for floor-mounted, high wall-mounted, or ceiling-mounted unit				
Control type preference	Wi-Fi enabled remote control or other				
Location and Home Type					
Outdoor design conditions					
Indoor design conditions					
Home Type	Vintage, single detached, middle-unit townhome, etc.				
Zoning requirements					
Room types	Typical single room or a large or open plan room/hallway, where more than one unit may be required				
Plans, Sketches, Notes					
Measurement, Areas, and Volumes					
Windows					
Doors					
Exposed walls					
Above grade walls					
Partitions					
Daylight-basement floors (wedgies)					
Closets (size matters)					
Halls (size matters)					
Above grade volume (for infiltration)					



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Construction Details					
Walls					
Windows (detail and direction)					
Doors (detail and direction)					
Ceiling					
Roof					
Skylights					
Floors					
Slab on grade (edge insulation?)					
Envelope leakage evaluation					
Internal load survey – Occupants					
Internal load survey – Appliances					
Duct system survey – Location					
Duct system survey – Insulation					
Duct system survey – Sealing					
Air quality survey (ventilation?)					
Garages					
Fireplaces					
Others					
Retrofit Checklist					
Load estimate required					
Comfort, Air-quality and Efficiency – Compliance with BC Building Code					

* A floor-mounted unit may be better for an older user to give more direct heat flow and allow easier access for maintenance. A high wall-mounted or ceiling-mounted unit can provide more effective cooling and allows occupants more flexibility with arranging furniture in the room.

