Claimtorch

HVAC warranty claim checklist

What the tech must capture before leaving the job. Last checked October 23, 2026.

Job # _____ Tech _____ Date _____

☐	1	**A clear photo of the unit's rating plate (nameplate), with the model and serial readable** Portals look up the unit and its coverage by serial number. A photo settles typos later.
☐	2	**Unit model number and serial number** Every form we checked asks for the serial.
☐	3	**The matching unit: outdoor unit model and serial if the claim is for an indoor coil; air handler model and serial if it's for a heat strip** Some coil coverage depends on the outdoor unit it's matched with.
☐	4	**Install date, if you can find it on site** Coverage depends on when the unit went in.
☐	5	**Failure date and repair date** Claim deadlines count from one of these two dates.
☐	6	**Owner's name, service address and phone. Owner-occupied home, rental or business? Original owner?** Coverage can differ by application type and owner.
☐	7	**Failed part number and replacement part number, with quantity** The part numbers tie the claim to the part you bought and the part that failed.
☐	8	**Which part caused the failure (one part)** ServiceBench lets you mark only one "causal part."
☐	9	**A written diagnosis: what failed, how you confirmed it, what you did. Never just "bad."** Carrier Enterprise says not to write "broke," "bad" or "damaged."
☐	10	**Compressor job: the failed and new compressor serial numbers, plus a photo of each compressor's rating plate** Compressor claims ask for serials, and some ask for photos.
☐	11	**Sealed system opened: the filter drier you replaced, and its part number** Goodman's form says if the drier isn't replaced, labor reimbursement is rejected.
☐	12	**Full unit swap: the authorization number, before you swap** Unit exchanges need approval first.
☐	13	**The failed part, tagged with the job and kept** Some brands want it back, on a clock.

Policies are the manufacturers' and distributors' own and can change. Sources: claimtorch.com/blog/hvac-warranty-claim-checklist/ · General information, not legal advice. Questions? info@claimtorch.com