Refrigerant compliance checklist

Trace the work your acquisition target performs to technician credentials, equipment records and the refrigerants its crews handle.

How to use this file

1. Use installation dates, model identifiers and job records supplied by the shop.
2. Check current EPA materials and the code authority for each project type.
3. Keep unresolved equipment and training questions on a dated exception list.

Shop or transaction _____

Prepared by _____

Period and cutoff date _____

> Illustrative outline — not legal advice; have your attorney draft final documents.

Credentials and service records

□ Match each technician’s Section 608 certification type to the appliances they service and retain supporting records.

Owner and target date _____

Evidence or exception _____

Next action _____

□ Select recent jobs using different refrigerants. Trace the equipment ID, service date and recovery records where applicable.

Owner and target date _____

Evidence or exception _____

Next action _____

□ Ask who owns the recovery equipment, when it was serviced and who signs off on shop procedures.

Owner and target date _____

Evidence or exception _____

Next action _____

Stock, tools and training

□ Separate new equipment, service parts, reclaimed product and field-returned cylinders in the inventory schedule.

Owner and target date _____

Evidence or exception _____

Next action _____

□ Match cylinder labels and equipment models to purchase invoices, storage assignments and responsible technicians.

Owner and target date _____

Evidence or exception _____

Next action _____

□ Collect A2L training records and manufacturer instructions. Ask a qualified supervisor which tools and practices each installation requires.

Owner and target date _____

Evidence or exception _____

Next action _____

Job-level exceptions at closing

□ For open installations, record equipment manufacture or import date, project type, planned installation date and jurisdiction.

Owner and target date _____

Evidence or exception _____

Next action _____

□ Ask the authority and supplier to confirm eligibility for the intended use before treating stock as fully saleable.

Owner and target date _____

Evidence or exception _____

Next action _____

□ Estimate disputed inventory, rework and training costs in separate lines and assign an owner for resolution.

Owner and target date _____

Evidence or exception _____

Next action _____