

KATY AIR CONDITIONING

Katy Homebuyer HVAC Due-Diligence Checklist

Document the system. Separate inspection scope. Resolve material questions before the deadline.

PROPERTY: _____

OPTION DEADLINE + TIME: _____

1 EQUIPMENT + RECORDS

- ☐ Photograph data plates: outdoor unit, indoor unit, coil, and every additional system.
- ☐ Record brand, model, serial, printed manufacture date, install date, and warranty transfer terms.
- ☐ Collect service invoices; flag repeat drains, repeat refrigerant additions, major parts, and deferred work.

2 REFRIGERANT + MATCH

- ☐ Record the exact refrigerant from the nameplate; do not infer it from age or color.
- ☐ Ask for the proposal, startup sheet, equipment schedule, manufacturer match data, or AHRI certificate.
- ☐ If component dates differ, document what changed and ask whether the current combination is supportable.

3 DRAIN + OVERFLOW

- ☐ Identify the primary drain, auxiliary pan, secondary drain, and/or overflow shutoff where present.
- ☐ Flag water in the pan, rust, ceiling stains, patched areas, clogs, or previous water events.
- ☐ Ask a qualified person to confirm the installed protection operates as intended.

7 BEFORE THE DEADLINE

- ☐ Write down the exact contract deadline and time; use your executed contract and professional advice.
- ☐ Separate what the home inspector answered from questions outside the inspector's required scope.
- ☐ Obtain needed specialist findings, written scope, price, warranty, and permit assumptions in time to act.

4 DUCTS + ATTIC

- ☐ Note damaged, disconnected, crushed, kinked, sagging, or uninsulated accessible ducts.
- ☐ Note absent airflow, sweating, water staining, suspect growth, or restricted service access.
- ☐ List rooms with weak airflow or a history of uneven summer comfort.

5 TEMPERATURE + HUMIDITY

- ☐ Record the inspector's cooling-performance method, result, and conditions at the time.
- ☐ Note thermostat humidity, condensation, odors, long run times, and room-to-room differences.
- ☐ Treat one temperature differential as one observation - not proof of sizing, charge, balance, or life.

6 PERMITS + LICENSE

- ☐ Ask for permit number, final inspection, installation invoice, equipment schedule, and startup record.
- ☐ Confirm the authority for the exact address; the Katy mailing area crosses jurisdictions.
- ☐ Verify the responsible contractor and active license at tdlr.texas.gov/verify.htm.

SCOPE SPLIT

Inspector: required accessible operation/performance, visible condensate and duct deficiencies, with stated limits.

HVAC contractor: refrigerant, component match, technical diagnosis, repair/replacement scope, price, and warranty.

SPECIALIST TRIGGERS

Unknown age; unclear component match; repeat refrigerant or drain work; water/rust; weak airflow; poor/inconclusive cooling result; humidity; noise/icing; missing records; major-cost decision.

NOTES + SPECIALIST HANDOFF

Unresolved question / inspection finding:

Report, quote, or answer needed by:

Contact / license number:

Decision-support only - not an inspection, diagnosis, code review, legal advice, or deadline calculator. Use the executed contract and qualified professionals. Official links: trec.texas.gov/online-sops | tdlr.texas.gov/acr | tdlr.texas.gov/verify.htm

KATY AIR CONDITIONING Katy Homebuyer HVAC Due-Diligence Checklist

Document the system. Separate inspection scope. Resolve material questions before the deadline.

Scope and escalation desk guide

Use the home inspection for broad condition reporting; use a focused HVAC review for unresolved technical or cost questions.

TEXAS HOME INSPECTOR - MINIMUM SCOPE

Cooling performance

Reports system type and a supply-to-return temperature difference or another accepted performance method, subject to site and weather conditions.

Visible deficiencies

Reports required accessible equipment, condensate drain/pan, thermostat, clearance, coil, duct, insulation, register, and access deficiencies.

Important limits

Not required to identify refrigerant or leaks, verify indoor/outdoor match or tonnage, determine sizing/efficiency/adequacy, estimate life, or provide repair costs.

LICENSED HVAC CONTRACTOR - AGREED SCOPE

Technical diagnosis

Can evaluate refrigerant circuit, electrical and mechanical operation, airflow, static pressure, controls, drainage, and other agreed tests.

Component support

Can compare model data, manufacturer information, and available AHRI records to address compatibility and performance questions.

Decision documents

Can provide written findings, limitations, repair/replacement options, price, warranty, permit assumptions, and responsible license information.

ESCALATE EARLY WHEN THE ANSWER COULD CHANGE THE DEAL

- Cooling could not be tested or the result was deficient/inconclusive.
- Component ages or matching are unclear; a large repair or replacement may be needed.
- Refrigerant additions, water events, major repairs, noise, icing, or short cycling repeat.
- Persistent room imbalance or humidity needs more than a single temperature reading.



Katy Homebuyer HVAC Due-Diligence Checklist

Document the system. Separate inspection scope. Resolve material questions before the deadline.

Records, license verification, and partner handoff

1. IDENTIFY THE AUTHORITY

The Katy mailing area crosses municipal and county boundaries. Use the City of Katy resident/permit tools first; if outside city limits, check the exact municipality or county for the property address.

2. ASK FOR THE COMPLETE FILE

Request the permit number, final inspection or approval, paid invoice, equipment schedule, proposal, startup/commissioning record, warranties, and service history. Match model numbers to installed equipment.

3. INTERPRET RECORD GAPS CAREFULLY

No online result is not proof of unpermitted work. Older records may be incomplete or held by another authority. Ask the authority having jurisdiction what the result means for the address and installation date.

TDLR LICENSE CHECK

Search the business and responsible ACR contractor. Record the license number, active status, expiration, class, and endorsements relevant to the proposed work. License status does not replace scope, price, or warranty review.

PARTNER HANDOFF

A realtor, inspector, relocation specialist, property manager, lender, or homeowner organization can share the neutral checklist. Add a partner logo/contact only with written approval and do not imply endorsement.

OUTREACH-FIRST VALUE

Offer the co-brandable PDF or editable edition with no link request in the first message. Ask for corrections and local questions. After the resource proves useful, discuss a citation or resource-page link.

OFFICIAL LOOKUPS

- TREC inspector standards: trec.texas.gov/online-sops
- TDLR ACR program: tdlr.texas.gov/acr/
- TDLR license search: tdlr.texas.gov/verify.htm
- EPA R-22 guidance: epa.gov/ods-phaseout/homeowners-and-consumers-frequently-asked-questions
- EPA HFC/R-410A guidance: epa.gov/hfcs/frequent-questions-phasedown-hydrofluorocarbons
- AHRI Directory: ahridirectory.org
- City of Katy permits: cityofkaty.com/residents/building-permits
- Harris County permits: oce.harriscountytexas.gov/Services/Permits
- Fort Bend County permits: fortbendcountytexas.gov/doing-business/permits
- Waller County permits: co.waller.tx.us/page/Permits