

Domestic Heating Design Guide - Client Requirement Survey Checklist

Stage 1 - Job Information

Job

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Address and location description

Stage 2 - General requirements

Fuel choice

Section 2.3.2.1 - What fuel is suitable? where will it be stored? How will it be accessed?

General client requirements

Section 2.3.2.2 - What does the customer want/need?

Existing systems

Section 2.3.2.3 - What is already present? What condition is it in/is it suitable, flushing requirements?

Plumbing services

Section 2.3.2.4 - Available water quality/water pressure/gas pressures?

Stage 3 - Heating appliances

Heat generator selection

Section 2.3.2.5 - What technologies are and are not suitable?

Energy-efficiency opportunities

Section 2.3.2.6 - What is and is not suitable? Insulation/windows/doors/draught-proofing

System type

Section 2.3.2.7 - Type of system, hot water and heating requirements to work for the client?

Pipework

Section 2.3.2.8 - Type of material, general routing requirements and location?

Stage 4 - Heating delivery

Heat emitters selection and location

Section 2.3.2.9 - Type, temperatures and location?

Controls

Section 2.3.2.10 - Type and functionality? What is a suitable control strategy given the type of property and the current and future occupants of the property? What equipment is required to achieve this?

Stage 5 - Health and safety

Access

Section 2.3.2.11 - Any working at heights, confined spaces, or other access considerations?

Bacteria (Legionella) protection

Section 2.3.2.11 - What is a suitable thermal disinfection strategy given the current and future occupants of the property?

Stage 6 - Client Confirmation

I, the client named below confirm that the requirements above have all been discussed in detail with myself, and I am happy for a quote and specification to be produced on their basis

Client Name

Client Signature

Date Signed