

# PLANNED MAINTENANCE AGREEMENT

*For the Heart of Your Home*

NAME \_\_\_\_\_  
STREET \_\_\_\_\_  
CITY \_\_\_\_\_ ZIP \_\_\_\_\_  
HOME PHONE \_\_\_\_\_ WORK PHONE \_\_\_\_\_  
EMAIL \_\_\_\_\_



1471 92nd Lane NE • Blaine, MN 55449

**(763) 783-4545**

[www.ericksonphc.com](http://www.ericksonphc.com)

**Terms:** (See Back For Choice of Plans) 12-month period from \_\_\_\_\_ to \_\_\_\_\_

**PLAN A** \_\_\_\_\_ **Number of Calls** \_\_\_\_\_ **PLAN D** \_\_\_\_\_ **Number of Calls** \_\_\_\_\_  
**PLAN B** \_\_\_\_\_ **Number of Calls** \_\_\_\_\_ **PLAN E** \_\_\_\_\_ **Number of Calls** \_\_\_\_\_  
**PLAN C** \_\_\_\_\_ **Number of Calls** \_\_\_\_\_ **PLAN F** \_\_\_\_\_ **Number of Calls** \_\_\_\_\_  
**LOCATION of EQUIPMENT** \_\_\_\_\_ **FILTER TYPE/SIZE** \_\_\_\_\_

**Coverage:**

**CLEAN AND CHECK** \_\_\_\_\_ We agree to perform the checks outlined on the back of this form for the equipment specified and to provide priority emergency service during the terms of this agreement. The checks will be scheduled during regular working hours, for the duration of this agreement. Customer agrees to pay any overtime labor charges. Regular working hours: \_\_\_\_\_ A.M. to \_\_\_\_\_ P.M., Monday thru Friday.

**Under the CUSTOMIZED plan, the following equipment will be maintained/tuned-up.  
No other parts are included under this plan.**

ITEM	MODEL	SERIAL NO.	AGE/DATE	FILTER SIZE

**We Agree To:** Perform all services listed above and on the back of this form according to the PLAN selected.  
**You Agree To:** Operate the equipment according to the manufacturer's specifications and promptly notify us of any unusual operating conditions.

**Exclusions:** Cabinets and ductwork • Water supply and drain beyond the equipment proper • Electrical service beyond the equipment disconnect switch (except control wiring) • Moving or relocating equipment • Any damage due to unexpected freezing. Work made necessary by the enforcement of government codes and building regulations • Devices and controls not furnished by us are EXCLUDED from this agreement unless otherwise specified in the agreement. We are not responsible for failure or damage to equipment or premises due to improper operation • Balancing system air flow other than at the equipment • We shall not be responsible for system design nor maintaining design conditions through performance of this agreement.

**General:** During the term of this agreement, we will take all reasonable precautions to avoid injury to persons and damage to property while on the premises, but we will not be liable for any special or consequential damages • We shall not be liable for losses or defects arising out of vandalism, fire, flood, lightning, wind, war, riots, and acts of God • No service will be rendered under this agreement if customer has a past due account.

**Price of Agreement** \_\_\_\_\_  
**Check No.** \_\_\_\_\_ **VISA** \_\_\_\_\_ **MasterCard** \_\_\_\_\_ **Authorization #** \_\_\_\_\_  
**Receipt of \$** \_\_\_\_\_ **for plan(s)** \_\_\_\_\_ **is acknowledged and the above agreement accepted on** \_\_\_\_\_ (DATE)  
**Agreement will continue for 1 year from this date and will be automatically renewed by payment of invoice each year.**  
**by** \_\_\_\_\_ **and** \_\_\_\_\_  
(CUSTOMER) (ERICKSON PHC)

- PERIODIC ANALYSIS
- ADJUSTMENT
- LUBRICATION
- CLEANING



## THE BENEFITS OF PM

**PEACE OF MIND** Automatic, periodic inspection, lubricating, adjusting and cleaning of your heating and cooling system keeps it running at peak, trouble-free efficiency. Potential problems are spotted before they cause trouble.

**COMPETENT EXPERTS AT YOUR SERVICE** A competent, trained, dependable staff of experts looks after your equipment and its performance. We work with you to schedule maintenance calls when convenient.

**PREFERRED TREATMENT** PM increases system reliability, but should you need emergency service, PM entitles you to preferential treatment and a 15% discount on repairs.

**CHOICE OF PROGRAMS** You set the number of PM calls per year. This will determine the cost of your Planned Maintenance Agreement.

**PRICE PROTECTION** Your agreement price will not be raised during the effective dates. Prices will not be raised for following renewal periods without notifying you.

**SERVICE YOU CAN TRUST** Manufacturers require regular maintenance by a licensed service contractor for their warranty to remain in effect. PM inspections help reduce the number of emergency calls by revealing potential problems that can be corrected inexpensively before causing major repair bills. Regular system tune-ups will also help reduce your utility bills by keeping your system operating at peak efficiency.

Choose the Maintenance Plan for Your Equipment Needs  
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**PLAN A**  
**(Gas Furnace)**

1. Clean and adjust automatic controls, including thermostat
2. Clean burner. Check for proper flame.
3. Adjust combustion for optimum fuel efficiency.
4. Lubricate as needed.
5. Test for combustion leaks.
6. Test safety shutoff response.
7. Check blower belt wear, tension and alignment (if applicable). Clean as necessary.
8. Clean or replace air filter.
9. Check flue for satisfactory operation.
10. Check condensate drainline (if present) for unobstructed flow.
11. Test for carbon monoxide
12. Check combustion air for obstructions.

**PLAN D**  
**(Air Conditioner)**

1. Check evaporator coil.
2. Clean condenser coil.
3. Check electrical connections for tightness.
4. Lubricate as needed.
5. Check for oil and refrigerant leaks.
6. Check safety devices.
7. Check fan operation.
8. Check metering device and coil temperatures.
10. Check for adequate refrigerant charge.
11. Check condensate drain line for unobstructed flow.
12. Adjust system for optimum cooling.

**PLAN B**  
**(Boiler)**

1. Clean and check automatic controls, including thermostat.
2. Clean burner. Check for proper flame.
3. Adjust combustion for optimum fuel efficiency.
4. Test for combustion leaks.
5. Test safety shutoff response.
6. Check pump. Lubricate bearings, check seal & linkage.
7. Check flue for satisfactory operation.
8. Check condensate drainline (if present) for unobstructed flow.
9. Test for carbon monoxide.
10. Check combustion air for obstructions.

**PLAN E**  
**(Water Heater)**

1. Clean burner. Check for proper flame.
2. Check pilot assembly.
3. Check gas valve.
4. Check relief valve.
5. Check/tighten thermocouple.
6. Check limit control.
7. Check thermostat.
8. Check ignition module.
9. Check manifold.
10. Inspect flue for satisfactory operation.
11. Check gas supply pressure.
12. Test for carbon monoxide.

**PLAN C**  
**(Air Handler)**

1. Clean and check automatic controls.
2. Clean air filter.
3. Check indoor coil.
4. Check for refrigerant leaks.
6. Check electrical connections for tightness.
7. Check voltage at the indoor unit.
8. Check amperage draw at indoor blower motor.
9. Check condensate drain line for unobstructed flow.
10. Check safety float switch, if applicable.
11. Adjust system for optimum cooling.
12. Check mounting brackets.

**PLAN F**  
**(Indoor Air Quality)**

**This plan is customized to your specific products and would include:**

1. Replacement of filters on humidifiers, media air cleaners, and HEPA filters.
2. Clean washable filters for air cleaners and air exchangers.
3. Clean bath fan grille and motor.
4. Replace UV bulbs.
5. Conduct an annual air quality test and provide you with a written report, including graphs, analysis and recommendations for the air quality factors monitored.