



JOB TITLE: Service Technician - Level 1

DESCRIPTION:

To provide maintenance on residential heating and air conditioning systems according to company standards providing the customer with a high quality experience.

QUALIFICATIONS:

- Valid driver's license
- Work from 28' extension ladder and 12' step ladder
- Ability to operate power and hand tools safely
- Enroll in HVAC course and/or in house training programs
- Ability to follow written and verbal directions, as given
- Acquire EPA certification within 3 months of entering Service Technician Level 1
- Operate company vehicle as needed
- High school diploma or general education degree (GED)

DUTIES:

- Arrive at job site at scheduled time and location as dispatched
- Relocate from one job site to another job site as dispatched during the workday
- Report to Service Administrator when arriving and leaving job site
- Follow instructions from supervisor and/or Service Administrator and carry out in timely manner
- Report problems with company tools or vehicle promptly
- Report problems with equipment to Service Administrator to expedite parts delivery
- Communicate with customers and collect C.O.D. on maintenance visits as directed
- Ability to work staggered schedule, if required
- Maintain professional appearance and attitude at all times
- Complete all service related forms properly
- Provide all customers with new/renewal maintenance agreement program information
- Acquire residential planned maintenance agreements
- Inform and educate customers on additional products or services available through company
- Inform customer of replacement options following company guidelines
- Develop basic knowledge of service tools and testing devices
- Develop soldering skills
- Develop customer service skills
- Perform filter changes utilizing filter checklist paperwork unassisted
- Develop skills to perform planned maintenance on residential systems utilizing maintenance checklist with assistance of a Service Technician Level 3 or higher
- Other duties as assigned.



JOB TITLE: Service Technician - Level 2

DESCRIPTION:

To provide maintenance on residential heating and air conditioning systems according to company standards providing the customer with a high quality experience.

QUALIFICATIONS:

Meet all qualifications and have all tools required for Service Technician Level 1 in addition to:

- Valid driver's license
- EPA Certification
- Work from 28' extension ladder and 12' step ladder
- Understand benefits of preventative maintenance
- Enroll in classes to acquire Low Voltage Energy License
- Enroll in classes to acquire NATE Core Certification
- High school diploma or general education degree (GED)

DUTIES:

- Arrive at job site at scheduled time and location as dispatched
- Relocate from one job site to another job site as dispatched during the workday
- Report to dispatcher when arriving and leaving job site
- Operate company vehicle as needed
- Follow instructions from supervisor and/or dispatcher and carry out in timely manner
- Report problems with company tools or vehicle promptly
- Report problems with equipment to Service Dispatcher to expedite parts delivery
- Communicate with customers and collect C.O.D. on maintenance visits as directed
- Maintain professional appearance and attitude at all times
- Complete all service related forms properly
- Provide all customers with new/renewal maintenance agreement program information
- Inform and educate customers on additional products or services available through company
- Acquire residential planned maintenance agreements
- Inform customer of replacement options following company guidelines
- Ability to work staggered schedule, if required
- On call status for emergency service, as required
- Perform routine preventative maintenance on residential equipment with minimal assistance and supervision, including completion of maintenance checklists in full
- Develop skills to perform planned maintenance on light commercial systems utilizing maintenance checklist with assistance of a Service Technician Level 3 or higher
- Develop enhanced customer service skills
- Develop basic knowledge of diagnostic and troubleshooting techniques
- Develop knowledge of proper interpretations of testing devices
- Develop basic knowledge and ability to layout and install low voltage wiring
- Develop basic knowledge and ability to read and interpret wiring diagrams and blueprints
- Other duties as assigned



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JOB TITLE: Service Technician - Level 3

DESCRIPTION: To provide maintenance on residential heating and air conditioning systems according to company standards providing the customer with a high quality experience.

Assist with training Level 1-2 Service Technicians

QUALIFICATIONS:

Meet all qualifications and have all tools required for Service Technician Level 1 and 2, in addition to:

- Valid driver's license
- EPA Universal Refrigerant Handling License
- Work from 28' extension ladder and 12' step ladder
- Understand and communicate benefits of preventative maintenance
- Acquire low voltage license within 2 years of employment as Service Technician Level 3
- Acquire NATE Core certification within 2 years of employment as Service Technician Level 3
- Acquire Universal EPA Refrigerant Handling license within 6 months of entering Service Technician Level 3
- High school diploma or general education degree (GED)

JOB DUTIES:

- Arrive at job site at scheduled time and location as dispatched
- Relocate from one job site to another job site as dispatched during the workday
- Report to dispatcher when arriving and leaving job site
- Operate company vehicle as needed
- Follow instructions from supervisor and/or dispatcher and carry out in timely manner
- Report problems with company tools or vehicle promptly
- Report problems with equipment to Service Dispatcher to expedite parts delivery
- Communicate with customers and collect C.O.D. on maintenance visits as directed
- Ability to work staggered schedule, if required
- Maintain professional appearance and attitude at all times
- Complete all service related forms properly
- Diagnose and troubleshoot residential and light commercial equipment, present repair and replacement options
- Complete service repairs as approved by the customer.
- Perform the following technical duties
- Electrical and refrigeration principles
- Service tools and testing devices
- Ability to perform routine preventative maintenance on a wide variety of residential and light commercial equipment without supervision
- Ability to layout and install refrigeration piping
- Ability to layout and install low voltage wiring
- Ability to read and interpret wiring diagrams and blueprints
- Ability to diagnose most residential & light commercial system problems, recommend and perform repairs



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- Provide all customers with new/renewal maintenance agreement program information
- Acquire residential planned maintenance agreements
- Inform and educate customers on additional products or services available through company
- Inform customer of replacement options following company guidelines
- Ability to work staggered schedule, if required
- On call status for emergency service, as required
- Train and instruct Service Technicians Level 1 and 2, as directed
- Converse with building and homeowners, general contractors, referring questions and/or problems to supervisor
- Ability to perform routine preventative maintenance on residential and light commercial equipment with minimal assistance and supervision
- Develop beginning knowledge of HVAC building code compliance
- Learn how to operate scissers and genie lifts in safe manner
- Develop basic knowledge of basic sheet metal practices
- Develop knowledge of air balancing principles and techniques
- Develop ability to calculate equipment efficiency
- Other duties as assigned



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JOB TITLE: Service Technician - Level 4

DESCRIPTION:

To provide maintenance on residential heating and air conditioning systems according to company standards providing the customer with a high quality experience. Assist with training Level 1-3 Service Technicians

QUALIFICATIONS:

Meet all qualifications and have all tools required for Service Technician Level 1-3, in addition to:

- Valid driver's license
- EPA Universal Refrigerant Handling License
- Work from 28' extension ladder and 12' step ladder
- Meet all qualifications and have all tools required for Service Technicians 1-3. Including ability to demonstrate working knowledge of daily, weekly, monthly skills noted below.
- Low Voltage License
- NATE Core Certification
- Understand and communicate benefits of preventative maintenance
- Operate scissors and genie lifts in safe manner
- High school diploma or general education degree (GED)

DUTIES:

- Arrive at job site at scheduled time and location, as dispatched
- Relocate from one job site to another job site, as dispatched during the workday
- Report to dispatcher when arriving and leaving job site
- Operate company vehicle as needed
- Follow instructions from supervisor and/or dispatcher and carry out in timely manner
- Report problems with company tools or vehicle promptly
- Report problems with equipment to Service Dispatcher to expedite parts delivery
- Communicate with customers and collect C.O.D. on maintenance visits, as directed
- Ability to work staggered schedule, if required
- Maintain professional appearance and attitude at all times
- Complete all service related forms properly
- Complete service repairs as approved by the customer.
- Perform the following technical duties
- Electrical and refrigeration principles
- Service tools and testing devices
- Ability to layout and install refrigeration piping
- Ability to layout and install low voltage wiring
- Ability to read and interpret wiring diagrams and blueprints
- Diagnose, repair & provide preventative maintenance on a wide range of residential and light commercial equipment without supervision
- HVAC building code compliance
- Advanced troubleshooting techniques
- Advanced experience in presenting repair and replacement options



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- Operation of scissors and genie lifts in safe manner
- Basic sheet metal practices
- Air balancing principles, techniques & diagnostics with velometer or hood
- Calculate equipment efficiency
- Other duties as assigned
- Acquire residential planned maintenance agreements
- Inform and educate customers on additional products or services available through company
- Inform customer of replacement options following company guidelines
- Ability to work staggered schedule, if required
- On call status for emergency service, as required
- Train and instruct Service Technicians Level 1-3, as directed
- Begin acquisition of NATE Specialty Certifications
- Converse with building and homeowners, general contractors, referring questions and/or problems to supervisor
- Communicate clearly, the ideas and explanations of problems to customers and coworkers
- Diagnose and troubleshoot a wide range of residential and light commercial equipment, present repair and replacement options
- Complete service repairs as approved by customer



JOB TITLE: Service Technician - Level 5

DESCRIPTION: To provide maintenance on residential heating and air conditioning systems according to company standards providing the customer with a high quality experience. Assist with training Level 1-4 Service Technicians. Provide feedback to the Service Manager regarding technical training needs, inventory and retail pricing. Develop training programs for the service department as needed and directed.

QUALIFICATIONS:

Meet all qualifications and have all tools required for Service Technician Level 1-4, in addition to:

- Valid driver's license
- EPA Universal Refrigerant Handling License
- Work from 28' extension ladder and 12' step ladder
- Low Voltage License
- Understand and communicate benefits of preventative maintenance
- Experience in training and mentoring service technicians
- Operate scissors and genie lifts in safe manner
- NATE Core Certification & Acquire Specialty Certifications within 1 year of Service Technician Level 5
- High school diploma or general education degree (GED)

DUTIES:

- Arrive at job site at scheduled time and location as dispatched
- Relocate from one job site to another job site as dispatched during the workday
- Report to dispatcher when arriving and leaving job site
- Operate company vehicle as needed
- Follow instructions from supervisor and/or dispatcher and carry out in timely manner
- Report problems with company tools or vehicle promptly
- Report problems with equipment to Service Dispatcher to expedite parts delivery
- Communicate with customers and collect C.O.D. on maintenance visits as directed
- Ability to work staggered schedule, if required
- Maintain professional appearance and attitude at all times
- Complete all service related forms properly
- Complete service repairs as approved by the customer.
- Provide all customers with new/ renewal maintenance agreement program information
- Acquire residential planned maintenance agreements
- Inform and educate customers on additional products or services available through company
- Inform customer of replacement options, following company guidelines
- Ability to work staggered schedule, if required
- On call status for emergency service, as required
- Train and instruct Service Technicians Level 1-4, as directed
- Perform the following technical duties:
 - Advanced electrical and refrigeration principles
 - Service tools and testing devices



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- Ability to layout and install refrigeration piping
- Ability to layout, design and install low voltage wiring
- Ability to read and interpret wiring diagrams and blueprints and make accurate material lists
- Advanced diagnostic, repair and provide preventative maintenance on a wide range of residential and light commercial equipment without supervision
- HVAC building code compliance
- Advanced troubleshooting techniques
- Advanced experience in presenting repair and replacement options
- Operation of scissors and genie lifts in safe manner
- Basic sheet metal practices
- Air balancing principles, techniques and diagnostics with velometer or hood
- Calculate equipment efficiency and operating costs
- Converse with building and homeowners, general contractors, referring questions and/or problems to supervisor
- Communicate clearly, the ideas and explanations of problems to customers/coworkers
- Diagnose and troubleshoot a wide range of residential and light commercial equipment, present repair and replacement options
- Responsible for establishing technical training schedule based upon team needs for the calendar year, as directed by Service Manager
- Create & present training seminars and classes for in-house meetings, as directed by Service Manager
- Establish proper seasonal inventory for both shop and truck stock, as directed by Service Manager
- Other duties as assigned



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JOB TITLE: Service Field Supervisor

DESCRIPTION: Oversee the efficiency and mentoring of the service technician in regards to revenue, maintenance and agreement sales, lead generation and other service related goals. Responsible for making sure all service technicians are properly trained. Answers field service questions. Responsible for diagnosing and repairing HVAC equipment failures and customer home comfort issues. Works with Service Manager on ideas for reducing the costs of the service department. Models how to correctly select the appropriate diagnostic and repair charges from the flat rate book, per company policy. Advises Service Manager if service repair times are not accurate in the flat rate books. Maintains required levels of truck stock items.

QUALIFICATIONS:

- NATE Certification
- Three to five years related experience and/or training in customer service, management in a service industry or equivalent combination of education and experience
- Ability to read and interpret wiring diagrams and blueprints
- Be familiar with a wide range of equipment and troubleshooting techniques
- Operate scissor and genie lifts in a safe manner
- Knowledge of basic sheet metal practices
- Ability to perform load calculations
- Knowledge of air balancing principles and techniques
- Experience making repair and replacement decisions
- Valid driver's license
- Computer skills
- Organized
- Advanced customer service skills
- Advanced communication skills with service technicians and other team members
- Meet criteria of a Level 4 or above technician
- High school diploma or general education degree (GED)

DUTIES:

- Report directly to first call of the day unless otherwise dispatched
- Proper diagnosis and repair of HVAC equipment
- Explain services and policies to customer prior to diagnostics and repair
- Charge and collect for all work performed per company policy and procedures
- Complete paperwork daily, recording all hours and materials used on each job prior to leaving job site
- Turn in all completed paperwork and related forms to Service Manager or Service Dispatcher daily, or as directed
- Assist installation department with install related issues as directed by the Service Manager or Service Dispatcher
- Responsible for making sure all service technicians are properly trained
- Present training seminars and classes for in house meetings



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- Ride with each service technician a minimum of one day per month for the purpose of training. Special needs may require riding with a particular technician more than one time per month.
- Review all callbacks and consult with the service manager on proactive ways to reduce callbacks.
- Help service technicians in the field when appropriate and be available for contact or assistance after hours
- Run after hour's calls, as required
- Assist in establishing proper seasonal inventory levels
- Assist other technicians with receiving required certifications
- Address company warrant issues as directed by the service manager
- Resolve difficult jobs as directed by the service manager or service dispatcher
- Contact the office after each service call to be dispatched to the next call
- Keep entire work area (including van) neat and organized and free of scrap, debris and fingerprints
- Provide customers with information about maintenance agreement programs for Residential and commercial jobs
- Provide customers with information on new equipment and accessories, when necessary
- Maintain professional appearance and attitude at all times
- Conducts truck and tool inspections
- Responsible for cleanliness of service fleet
- Promote positive company culture at all times
- Other duties, as assigned