HVAC maintenance checklist

Rooftop unit or air handler

01 Unit and visit

Unit name and tag

Date

Location

Outdoor temperature

Make, model and serial

Technician (printed name)

02 Readings

READING	THIS VISIT	LAST VISIT	NOTE
Return air temperature (cooling)			
Supply air temperature (cooling)			
Split: return minus supply			
Filter pressure drop			
Motor and compressor amps, each leg			
Temperature rise (heating, high fire)			

Compare each reading with last visit's and with the limits in the unit's manual and on its nameplate.

03 Monthly

6 checks

CHECK	OK	FAIL	NOTE
Filters: look at the bank, read the gauge	☐	☐	
Condensate drain pan, trap and line	☐	☐	
Condensate float switch, where fitted: lift it	☐	☐	
Cabinet: panels on, no oil at refrigerant joints	☐	☐	
Running: noise, vibration, alarms, space near setpoint	☐	☐	
Split system condenser clear, line set insulation intact	☐	☐	

04 Quarterly

7 checks

CHECK	OK	FAIL	NOTE
Filter pressure drop recorded, change-out date checked	☐	☐	
Fan belts: tension, wear, sheave alignment	☐	☐	
Fan and compressor amps, voltage at the disconnect	☐	☐	
Outdoor air dampers and actuators open and close	☐	☐	
Evaporator and condenser coils	☐	☐	
Contactors and terminals (unit locked out)	☐	☐	
Space around the unit and its access panels	☐	☐	

05 Exhaust fans

4 checks

CHECK	OK	FAIL	NOTE
Runs when scheduled; backdraft damper opens and closes	☐	☐	
Belt, pulleys, bearings and motor	☐	☐	
Wheel and housing	☐	☐	
Bird screen, curb and roof flashing	☐	☐	

06 Spring start-up: cooling

9 checks

CHECK	OK	FAIL	NOTE
Crankcase heaters on for the time in the manual	☐	☐	
Condenser coil washed, fins combed	☐	☐	
Drain pans cleaned and checked for growth	☐	☐	
Outdoor air intake louvers and bird screens	☐	☐	
Run capacitors measured	☐	☐	
Contactor and condenser fan motor	☐	☐	
Refrigerant circuit checked by a certified technician	☐	☐	
Economizer changes over and modulates; sensors read sensibly	☐	☐	
Cooling readings taken (page 1)	☐	☐	

07 Fall start-up: heating

10 checks

CHECK	OK	FAIL	NOTE
Heat exchanger: no cracks, holes or rust-through	☐	☐	
Burners clean, flame even, ignition and flame sensing work	☐	☐	
Flue, inducer fan and combustion air inlet clear	☐	☐	
Safety limits tested as the manual describes	☐	☐	
Gas pressure to the rating plate (qualified gas technician)	☐	☐	
Temperature rise recorded	☐	☐	
Carbon monoxide alarms where fuel is burned	☐	☐	
Electric heat and heat pumps: amps, reversing valve, defrost	☐	☐	
Freeze protection: freezestats, heat tape	☐	☐	
Belts and intake louvers again	☐	☐	

> A cracked or holed heat exchanger: shut the gas off and tag the unit until it is repaired.

08 Defects and sign-off

Defects found, or no defects

Work orders written

Technician signature