

YOUR LOGO
HERE

HVAC · COOLING & HEATING TUNE-UP

HVAC Seasonal Preventive Maintenance Checklist

For split systems, packaged RTUs, and heat pumps. Complete the season sections that apply to this unit.

COMPANY

LICENSE # / PHONE

PM / WORK ORDER #

VISIT DATE

UNIT ID

A Equipment & site

CUSTOMER / FACILITY NAME		ACCOUNT #	PMA / CONTRACT REF.	SITE ADDRESS	
BUILDING / SUITE	UNIT ID / TAG	AREA / ZONE SERVED	UNITS COVERED THIS VISIT	EQUIPMENT LOCATION ☐ Rooftop ☐ Mech. room ☐ Closet ☐ Pad	
EQUIPMENT TYPE ☐ Split system ☐ Packaged RTU ☐ Heat pump ☐ Mini-split ☐ AHU + separate condensing unit			HEAT SOURCE ☐ Gas furnace ☐ Electric strips ☐ Heat pump ☐ Dual fuel		
CONDENSING UNIT MAKE & MODEL		CONDENSING UNIT SERIAL #	AHU / FURNACE MAKE & MODEL		AHU / FURNACE SERIAL #
CAPACITY (TONS / BTU/H)	VOLTAGE / PHASE	RATED FLA / RLA / MCA	HEAT INPUT (BTU/H OR KW)	REFRIGERANT ☐ R-410A ☐ R-454B ☐ R-32 ☐ R-22 (legacy)	
FILTER SIZE(S) & QTY	METERING DEVICE ☐ TXV ☐ EEV ☐ Fixed orifice / piston		FILTER TYPE ☐ Pleated ☐ Media ☐ Washable		BELT SIZE
VISIT ☐ Cooling tune-up ☐ Heating tune-up		ARRIVAL TIME	DEPARTURE TIME	OUTDOOR TEMP AT START	INDOOR TEMP AT START
TECHNICIAN		EPA 608 CERT #	EPA 608 TYPE ☐ Type I ☐ Type II ☐ Type III ☐ Universal		
PRIOR VISIT REF. & OPEN DEFICIENCIES				RUNTIME HOURS (IF LOGGED)	

B Filters, airflow & cabinet

OK = no action · Fix = cleaned, adjusted, or repaired · Def = deficiency (list in Results) · N/A

#	Item	OK	Fix	Def	N/A	Notes / deficiency
1	Return-air filter(s) inspected; replaced with correct size and MERV, arrow oriented to airflow	☐	☐	☐	☐	
2	Filter rack, gaskets, and access panels seal with no air bypass	☐	☐	☐	☐	
3	Supply registers, return grilles, and accessible ductwork clear; no crushed or disconnected flex	☐	☐	☐	☐	
4	Cabinet panels, screws, and gaskets secure; no leakage at seams or wiring penetrations	☐	☐	☐	☐	
5	Outdoor unit clearance on all sides and above; coil free of grass, leaves, lint, stored material	☐	☐	☐	☐	
6	Pad or curb level, secure, no standing water; mounting hardware tight	☐	☐	☐	☐	
7	Suction-line insulation intact; line-set supports and isolation grommets in place	☐	☐	☐	☐	

C Coils, condensate & drain

#	Item	OK	Fix	Def	N/A	Notes / deficiency
1	Condenser coil inspected; cleaned with approved cleaner and rinsed; fin-comb work noted	☐	☐	☐	☐	
2	Evaporator coil inspected for dirt, growth, frost, even airflow; cleaned where accessible	☐	☐	☐	☐	
3	Fins combed where flattened; no oil residue indicating a leak at U-bends or return bends	☐	☐	☐	☐	
4	Primary drain pan clean, draining, no cracks, rust-through, or standing water	☐	☐	☐	☐	
5	Condensate line cleared and flushed; trap intact and primed; flow verified to termination	☐	☐	☐	☐	
6	Auxiliary pan clean and dry; float (safety) switch present and tested to interrupt	☐	☐	☐	☐	
7	Condensate pump cycles on float, drains fully, check valve holds; reservoir clean	☐	☐	☐	☐	
8	Drain pan treatment tablet or strip installed (per agreement scope)	☐	☐	☐	☐	

#	Item	OK	Fix	Def	N/A	Notes / deficiency
9	Blower wheel and housing inspected for dirt loading and imbalance; cleaned where fouled	☐	☐	☐	☐	

D Electrical, motors & controls

#	Item	OK	Fix	Def	N/A	Notes / deficiency
1	Disconnect, breaker, and fuse sizing match nameplate MCA / max fuse; fuses and lugs tight	☐	☐	☐	☐	
2	Line- and low-voltage connections tightened; no discoloration, melted insulation, or burnt smell	☐	☐	☐	☐	
3	Contactors checked for pitting, burning, chatter; coil pull-in confirmed; replaced if pitted	☐	☐	☐	☐	
4	Run / start capacitors replaced if out of tolerance or bulged (record μ F in readings)	☐	☐	☐	☐	
5	Condenser fan motor bearings checked; motor cleaned and lubricated where serviceable	☐	☐	☐	☐	
6	Indoor blower: ECM module or PSC capacitor and speed taps verified	☐	☐	☐	☐	
7	Belt drive: belt checked for cracks, glazing, wear; tension and sheave alignment set; pulleys tight	☐	☐	☐	☐	
8	Blower and condenser-fan bearings checked for noise and play; lubricated per mfr. where fitted	☐	☐	☐	☐	
9	Crankcase heater operational (if equipped); low-ambient and head-pressure controls verified	☐	☐	☐	☐	
10	Safety controls tested: high / low pressure switches, freeze stat, float switch, limit interlocks	☐	☐	☐	☐	

E Cooling season: refrigerant circuit

Run in cooling at least 15 minutes before taking readings.

#	Item	OK	Fix	Def	N/A	Notes / deficiency
1	Compressor discharge line checked for overheating; no signs of flooding or starving	☐	☐	☐	☐	
2	Leak check performed (electronic, soap, or UV) at fittings, Schrader cores, and coil where suspected	☐	☐	☐	☐	
3	Schrader caps and core seals verified; refrigerant added recorded by type and weight on EPA leak log	☐	☐	☐	☐	
4	TXV / EEV sensing bulb secure and insulated; superheat response confirmed	☐	☐	☐	☐	

F Heating season: gas furnace & combustion safety

Skip on electric-heat or heat-pump-only systems.

#	Item	OK	Fix	Def	N/A	Notes / deficiency
1	Burner assembly, flame sensor, and igniter (hot-surface or spark) inspected and cleaned	☐	☐	☐	☐	
2	Burner flames steady and blue; no lifting, rollout, or yellow tipping	☐	☐	☐	☐	
3	Gas piping, valve, and unions leak-checked at all connections; no leaks	☐	☐	☐	☐	
4	Heat exchanger inspected (visual / camera) for cracks, corrosion, rust scale, separation	☐	☐	☐	☐	
5	Inducer motor, pressure switch, and condensate trap and tubing (high-efficiency) clear and operating	☐	☐	☐	☐	
6	Flue / vent connector, draft, and combustion-air openings clear; pitch and clearance correct	☐	☐	☐	☐	
7	CO alarms confirmed present	☐	☐	☐	☐	
8	Limit switch, rollout switch, and gas-valve safety shutoff tested	☐	☐	☐	☐	

G Heat pump: heating mode & defrost

#	Item	OK	Fix	Def	N/A	Notes / deficiency
1	Reversing valve shifts fully; no internal bypass (no abnormal mid-line temperature)	☐	☐	☐	☐	
2	Defrost verified: sensor, board timing, valve actuation, outdoor-fan control	☐	☐	☐	☐	
3	Auxiliary / emergency heat strips energize on demand; sequencer staging verified	☐	☐	☐	☐	
4	Outdoor coil clear of ice and debris; base-pan drain open	☐	☐	☐	☐	
5	Defrost termination and ambient sensors checked; balance-point and lockout settings verified	☐	☐	☐	☐	
6	Dual-fuel changeover to gas furnace at the correct outdoor setpoint (where applicable)	☐	☐	☐	☐	

H Economizer, dampers & thermostat

#	Item	OK	Fix	Def	N/A	Notes / deficiency
1	Economizer damper travels full open to full closed; actuator and linkage free, no binding	☐	☐	☐	☐	
2	Outdoor-, return-, and mixed-air sensors within tolerance against a reference thermometer	☐	☐	☐	☐	
3	Changeover setpoint (dry-bulb or enthalpy) and minimum position verified per sequence	☐	☐	☐	☐	
4	Damper seals intact; barometric relief or power exhaust operates with economizer	☐	☐	☐	☐	
5	Outside-air intake and louvers clear; bird screen and rain hood intact	☐	☐	☐	☐	
6	Thermostat mode, setpoints, and schedule confirmed with customer; staging and fan settings correct	☐	☐	☐	☐	
7	Thermostat calibration checked; remote sensors reading accurately	☐	☐	☐	☐	
8	Thermostat batteries replaced where applicable; control wiring and terminals secure	☐	☐	☐	☐	
9	BAS or smart-controller alarms reviewed and cleared	☐	☐	☐	☐	

I Measurements

Ranges are commonly cited only; confirm against nameplate and manufacturer literature.

Reading	Unit	Target / spec	Measured	OK	Notes
AIRFLOW					
Cooling supply / return delta-T	°F	16–22 typ.		☐	
Static pressure across coil & filter / total external	in.wc	Blower table		☐	
ELECTRICAL					
Run capacitor	µF	Rated ± tol.		☐	
Start capacitor	µF	Rated ± tol.		☐	
Compressor running amps	A	RLA		☐	
Condenser fan motor amps	A			☐	
Indoor blower motor amps	A			☐	
Supply voltage L1-L2 / L2-L3 / L1-L3	V			☐	
Voltage imbalance	%			☐	
Control transformer secondary	VAC	24		☐	
COOLING SEASON: REFRIGERANT CHARGE					
Indoor entering wet-bulb	°F			☐	
Outdoor dry-bulb	°F			☐	
Suction pressure / saturation temp	psi/°F			☐	
Liquid (high-side) pressure / saturation temp	psi/°F			☐	
Suction line temp / superheat (fixed orifice: target-superheat method)	°F	8–12 (TXV)		☐	
Liquid line temp / subcooling	°F	Mfr. (8–12)		☐	
HEATING SEASON: GAS FURNACE					
Gas manifold pressure	in.wc	NG 3.5 / LP 10–11		☐	
Flame sensor signal	µA			☐	
Flue-gas O ₂ / CO ₂	%			☐	
Stack temperature	°F			☐	
Steady-state efficiency	%			☐	
CO: ambient / flue / supply air	ppm	Safe limits		☐	

Reading	Unit	Target / spec	Measured	OK	Notes
Temperature rise	°F	Nameplate		☐	
HEAT PUMP: HEATING MODE					
Heating supply / return delta-T	°F	15-25 typ.		☐	
Heating suction pressure / saturation temp	psi/°F			☐	
Heating discharge pressure / saturation temp	psi/°F			☐	
Heat strip amp draw (per strip)	A			☐	

General planned-maintenance starting point compiled from publicly available manufacturer and industry guidance; not a manufacturer procedure. Superheat, subcooling, gas pressure, temperature rise, capacitor tolerance, and amp-draw figures are commonly cited ranges only; confirm against the nameplate and manufacturer literature. Combustion, refrigerant, and gas work must be done by qualified personnel; EPA Section 608 certification is required to handle refrigerant. Any CO, gas-leak, or cracked-heat-exchanger finding requires immediate corrective action. Codes and adopted amendments vary; verify with your AHJ.

J Results

OVERALL RESULT			
☐ Operating normally ☐ Deficiencies noted ☐ Repair required ☐ Red-tagged / shut down for safety			
SAFETY CONDITION FOUND (CRACKED HEAT EXCHANGER, HIGH CO, REFRIGERANT LEAK, ELECTRICAL HAZARD)		ACTION TAKEN	
CUSTOMER / REP. NOTIFIED: NAME	CONTACT	DATE NOTIFIED	
REFRIGERANT ADDED / RECOVERED: TYPE	WEIGHT (LB / OZ)	EPA LEAK RATE (IF LEAK FOUND)	
PHOTOS ATTACHED (COUNT / REF. #)	COMBUSTION PRINTOUT / METER READINGS REF.	NEXT PM ☐ Cooling ☐ Heating	NEXT DUE DATE

K Deficiencies

Unit ID	Component	Description	Reading vs. spec	Safety	Effic.	Monitor
				☐	☐	☐
				☐	☐	☐
				☐	☐	☐

L Recommended repairs & replacements

Recommendation	Priority	Quote / WO ref.

M Consumables installed

Item (filter / belt)	Size	Qty

TECHNICIAN SIGNATURE & EPA CERT #	CUSTOMER / AUTHORIZED REPRESENTATIVE
PRINT NAME DATE	PRINT NAME DATE