HVAC PREVENTIVE MAINTENANCE CHECKLIST

(Monthly Maintenance Tasks)

Monthly Maintenance Tasks

For the Month of ..... Date .....

TASK	STATUS
Inspect and replace air filters (or clean reusable filters). Dirty filters reduce airflow and increase energy costs by up to 15%.	
Check thermostat settings and calibration. Verify temperature readings match actual room temperature.	
Inspect condensate drain lines and drain pans. Clear any clogs and remove standing water to prevent mold growth.	
Check all supply and return vents/registers. Ensure none are blocked by furniture, equipment, or debris.	
Listen for unusual noises (grinding, rattling, buzzing) from the air handler, compressor, or fan motors.	
Inspect visible ductwork for disconnections, damage, or signs of moisture/mold.	
Check the area around outdoor condenser units. Clear vegetation, debris, and trash at least 2 ft from all sides.	
Verify that the system cycles on and off normally without short-cycling or running continuously.	
Additional Task:	

Instructions:

Perform these checks monthly year-round. Filter replacement frequency depends on building conditions — high-traffic or dusty environments may require replacement every 30 days instead of 90.

HVAC PREVENTIVE MAINTENANCE CHECKLIST

(Spring / Pre-Cooling Season)

Spring / Pre-Cooling Season

Date .....

TASK	STATUS
Replace all air filters before the cooling season begins.	
Clean condenser coils on the outdoor unit. Remove dirt, dust, and debris that accumulated over winter.	
Clean evaporator coils on the indoor unit. Dirty coils reduce cooling efficiency and cause ice buildup.	
Check refrigerant levels. Low refrigerant indicates a leak — schedule a certified technician for repair and recharge.	
Inspect and clean the blower assembly: fan blades, motor, bearings, and housing.	
Test the air conditioning system. Run a full cooling cycle and verify cold air reaches all zones.	
Check and tighten all electrical connections. Measure voltage and current on motors.	
Lubricate all moving parts: fan motors, bearings, and shaft assemblies per manufacturer specs.	
Inspect ductwork for leaks, gaps, or damaged insulation. Seal with mastic or metal tape (not duct tape).	
Calibrate programmable thermostats and verify scheduling for summer occupancy patterns.	
Additional Task:	

Instructions:

Complete before the cooling season begins (March–April in most U.S. regions). Only a licensed HVAC technician should handle refrigerant. EPA Section 608 requires certification for refrigerant work.

HVAC PREVENTIVE MAINTENANCE CHECKLIST

(Fall / Pre-Heating Season)

Fall / Pre-Heating Season

Date .....

TASK	STATUS
Replace all air filters before the heating season begins.	
Inspect the heat exchanger for cracks or corrosion (gas furnace systems). Cracked heat exchangers can leak carbon monoxide.	
Test the ignition system and burner assembly. Verify clean ignition and stable flame.	
Check gas connections and lines for leaks using a gas leak detector or soap solution.	
Inspect the flue/exhaust vent for blockages, corrosion, or disconnected sections.	
Test the heating system. Run a full heating cycle and verify warm air reaches all zones.	
Check and clean the condensate drain (heat pump and high-efficiency furnace systems).	
Inspect belts and pulleys for wear, cracking, or improper tension. Replace worn belts.	
Test carbon monoxide detectors in the building. Replace batteries and units per manufacturer schedule.	
Verify the emergency shutoff switch is accessible, labeled, and functional.	
Additional Task:	

Instructions:

Complete before the heating season begins (September–October in most U.S. regions). A cracked heat exchanger is a serious carbon monoxide hazard — if found, shut down the system and call a technician immediately.

HVAC PREVENTIVE MAINTENANCE CHECKLIST

(Annual Professional Service)

Annual Professional Service

Date .....

TASK	STATUS
Schedule a licensed HVAC technician for a comprehensive annual inspection and tune-up.	
Perform a combustion efficiency test on gas-fired heating equipment. Adjust burners for optimal air-fuel ratio.	
Check refrigerant charge and inspect for leaks using electronic leak detection.	
Inspect and test all safety controls: high-limit switches, pressure switches, and flame rollout switches.	
Measure airflow across the evaporator coil and compare to manufacturer specifications.	
Inspect the compressor for proper amperage draw, oil level, and operating pressures.	
Test economizer operation (if equipped). Verify dampers open and close at correct outdoor temperatures.	
Inspect all electrical components: contactors, capacitors, relays, and wiring for wear or arcing.	
Perform a full duct leakage test or visual duct inspection. Seal any identified leaks.	
Review energy consumption data year-over-year to identify efficiency trends or declining performance.	
Additional Task:	

Instructions:

Annual service should be performed by a licensed HVAC contractor. Biannual service (spring + fall) is recommended for commercial systems with both heating and cooling. Keep the service report on file for inspectors and insurance.

HVAC PREVENTIVE MAINTENANCE CHECKLIST

Documentation and Compliance

Date .....

TASK	STATUS
Maintain a filter replacement log with date, filter size/type, and person responsible.	
Record all temperature and pressure readings from each seasonal service visit.	
File annual technician service reports including findings, refrigerant amounts added, and parts replaced.	
Keep records of all refrigerant purchases and usage (required under EPA Section 608 for systems with 50+ lbs).	
Document any indoor air quality complaints and corrective actions taken.	
Track energy bills monthly and flag unusual increases that may indicate HVAC performance issues.	
Retain all maintenance records for a minimum of 3 years for compliance and insurance purposes.	
Additional Task:	

Instructions:

Proper records support insurance claims, energy audits, and regulatory compliance. EPA Section 608 requires refrigerant tracking for systems containing 50+ lbs of refrigerant. Keep all records on-site and accessible.