



HVAC Maintenance Checklist Template

conducted for

Sunny Hills

Conducted on

31 Oct 2018 03:40 PM

Prepared by

Jon Nieve

Location

102 S Mendel St, Fort Stockton, TX 79735, USA

Completed on




31 Oct 2018 04:11 PM

Score




35/38.0 - 92.11%

Failed Responses

This section lists responses that were set as "failed responses" in the template used for this audit

Question	Response	Details
Check the condenser coil to determine if it needs cleaning.	Needs Action	Second floor bedroom air conditioner's coil needed to be cleaned.
<div style="display: flex; align-items: center;">  <div style="margin-left: 10px;"> <p>Appendix 1</p> </div> </div>		
Replace air filter or clean reusable type filter.	Needs Action	Air filters of second floor air conditioner and first floor guest room air conditioner were cleaned. No need for replacement of filters.
<div style="display: flex; align-items: center;"> <div style="margin-right: 20px;">  <p>Appendix 2</p> </div> <div>  <p>Appendix 3</p> </div> </div>		
Check bearings & lubricate blower motor if needed.	Needs Action	Lubricated.

Audit - 35/38 92.11%

Question	Response	Details
Air Conditioner		Score (15/17) 88.23%
Check and adjust thermostat.	OK	
Check the condenser coil to determine if it needs cleaning.	Needs Action	Second floor bedroom air conditioner's coil needed to be cleaned.
 <p style="text-align: center;">Appendix 1</p>		
Check all wiring and connections to controls and electrical connections.	OK	
Check blower belt wear, tension & adjust.	OK	
Check voltage & amperage draw on all motors with meter.	OK	
Check compressor contactor.	OK	
Visually inspect compressor and check amp draw.	OK	
Check start capacitor & potential relay.	OK	
Check pressure switch cut-out setting.	OK	
Replace air filter or clean reusable type filter.	Needs Action	Air filters of second floor air conditioner and first floor guest room air conditioner were cleaned. No need for replacement of filters.
<div style="display: flex; justify-content: space-around;"> <div style="text-align: center;">  <p style="text-align: center;">Appendix 2</p> </div> <div style="text-align: center;">  <p style="text-align: center;">Appendix 3</p> </div> </div>		

Question	Response	Details
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REFERENCE: Reusable type filter
 [This is an example of how you can use iAuditor to include best practice reference images in your templates to assist with inspections]



Install gauges & check operating pressures.	OK	
Check refrigerant (freon) level and advise if adjustments necessary.	OK	Freon level still good.


Question	Response	Details
Check condensate drain and pan then advise of any discrepancies.	OK	
Check expansion valve & coil temperatures.	OK	
Lubricate parts as needed.	OK	
Check evaporator coil and advise if dirty or if it needs cleaning.	OK	
Check the shape that the total system is in and advise customer of discrepancies.	OK	Air conditioners of the property are well maintained. Only cleaning of the coils and filters were done.
Heat Pump		Score (20/21) 95.24%
Check and adjust thermostat.	OK	
Check to make sure that the indoor & outdoor units turn on.	OK	
Replace the air filter or clean if reusable type.	OK	
Check bearings & lubricate blower motor if needed.	Needs Action	Lubricated.
Check blower belt, wear, tension & adjust as needed.	OK	
Check electrical connections for tightness.	OK	
Check evaporator coil to determine if it needs cleaning.	OK	
Check voltage to unit.	OK	
Check blower motor amp draw.	OK	
Check electric heaters with amp probe and voltage during heating inspection.	OK	
Check condenser motor bearings & lubricate if needed.	OK	
Check condenser motor amp draw.	OK	
Check refrigerant (freon) level.	OK	
Check compressor amp draw.	OK	

Question	Response	Details
Check crankcase heater if compressor has one installed.	OK	
Check defrost controls.	OK	
Check reversing valve operation.	OK	
Check coil temperature.	OK	
Check condensate drain and pan then advise of any discrepancies.	OK	
Perform visual inspection of ductwork and make notes regarding discrepancies.	OK	
Check the shape that the total system is in and advise customer of discrepancies.	OK	Heat Pump is fairly new but only needed some lubrication.
Electric Heater		
Check and adjust thermostat.	N/A	
Check to make sure that the indoor unit turns on.	N/A	
Replace the air filter or clean if reusable type.	N/A	
Check bearings & lubricate blower motor if needed.	N/A	
Check blower belt, wear, tension & adjust as needed.	N/A	
Check evaporator coil to determine if it needs cleaning.	N/A	
Check voltage to unit.	N/A	
Check amp draw on motor.	N/A	
Check amperage draw on each element.	N/A	
Check total amperage draw on elements.	N/A	
Check heat sequencer.	N/A	
Check electrical wiring and connections.	N/A	
Check temperature rise.	N/A	
Check supply temperature.	N/A	

Question	Response	Details
Check heat anticipator.	N/A	
Perform visual inspection of ductwork and make notes regarding discrepancies.	N/A	
Check the shape that the total system is in and advise customer of discrepancies.	N/A	
Gas Furnace		
Check and adjust thermostat.	N/A	
Check heat anticipator.	N/A	
Check to make sure furnace/heat comes on.	N/A	
Replace the air filter or clean if reusable type.	N/A	
Check blower motor bearings & lubricate if needed.	N/A	
Check blower belt wear, tension & adjust as needed.	N/A	
Check the flue for rust & corrosion and advise of discrepancies.	N/A	
Check flue for satisfactory operation.	N/A	
Check, clean, and adjust pilot if needed.	N/A	
Check electronic spark ignition control for proper operation.	N/A	
Check all wiring and connections to controls and electrical connections.	N/A	
Check burners to see if they need cleaning and advise.	N/A	
Check and adjust burners for fuel efficiency.	N/A	
Check heat exchanger for cracks, soot, & rust.	N/A	
Check heat exchanger for cracks when the furnace is hot.	N/A	

Question	Response	Details
Check blower motor & induce draft motor amps.	N/A	
Check manifold pressure.	N/A	
Check fan controls.	N/A	
Test safety shutoff response.	N/A	
Check condensate drain and pan then advise of any discrepancies.	N/A	
Perform visual inspection of ductwork and make notes regarding discrepancies.	N/A	
Check the shape that the total system is in and advise customer of discrepancies.	N/A	
Dual Fuel Heat Pump Furnace		
Check and adjust thermostat.	N/A	
Check to make sure that the indoor & out doorunits come on, which includes the furnace.	N/A	
Replace the air filter or clean if reusable type.	N/A	
Check bearings & lubricate blower motor if needed.	N/A	
Check blower belt, wear, tension & adjust as needed.	N/A	
Check electrical connections for tightness.	N/A	
Check evaporator coil to determine if it needs cleaning.	N/A	
Check voltage to unit.	N/A	
Check blower motor amp draw.	N/A	
Check electric heaters with amp probe and voltage during heating inspection.	N/A	
Check condenser motor bearings & lubricate if needed.	N/A	
Check condenser motor amp draw.	N/A	

Question	Response	Details
Check refrigerant (freon) level.	N/A	
Check compressor amp draw.	N/A	
Check crankcase heater if compressor has one installed.	N/A	
Check defrost controls.	N/A	
Check reversing valve operation.	N/A	
Check coil temperature.	N/A	
Check the flue for rust & corrosion and advise of discrepancies.	N/A	
Check flue for satisfactory operation.	N/A	
Check, clean, and adjust pilot if needed.	N/A	
Check electronic spark ignition control for proper operation.	N/A	
Check and adjust burners for fuel efficiency.	N/A	
Check heat exchanger for cracks, soot, & rust.	N/A	
Check heat exchanger for cracks when the furnace is hot.	N/A	
Check blower motor & induce draft motor amps.	N/A	
Check manifold pressure.	N/A	
Check fan controls	N/A	
Test safety shut off response.	N/A	
Check condensate drain and pan then advise of any discrepancies.	N/A	
Perform visual inspection of ductwork and make notes regarding discrepancies.	N/A	
Check the shape that the total system is in and advise customer of discrepancies.	N/A	

Question	Response	Details	
Completion			
Overall Comment / Cost of Maintenance		Air conditioning system and heat pump are both in good condition. All parts are functioning according to specifications. Freon level still good. Only cleaning for maintenance was done. Everything should be good for another three months. Fee: \$100.00	
Name and Signature	Jon Nieve	31 Oct 2018 04:10 PM	

Media



Appendix 1



Appendix 2



Appendix 3