



HVAC Maintenance Checklist Template

Sunny Hills / 27 Feb 2023 / Jon Nieve

Complete

Score	92.11%	Flagged items	3	Actions	0
Client	Sunny Hills				
Conducted on	27.02.2023 10:30 PST				
Prepared by	Jon Nieve				
Location	102 S Mendel St, Fort Stockton, TX 79735, USA				

Flagged items

3 flagged

Audit / Air Conditioner

Check the condenser coil to determine if it needs cleaning.

Needs Action

Second floor bedroom air conditioner's coil needed to be cleaned.



Photo 1

Audit / Air Conditioner

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.



Photo 2



Photo 3

Audit / Heat Pump

Check bearings & lubricate blower motor if needed.

Needs Action

Lubricated.

Audit

3 flagged, 92.11%

Air Conditioner

2 flagged, 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.



Photo 1

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.



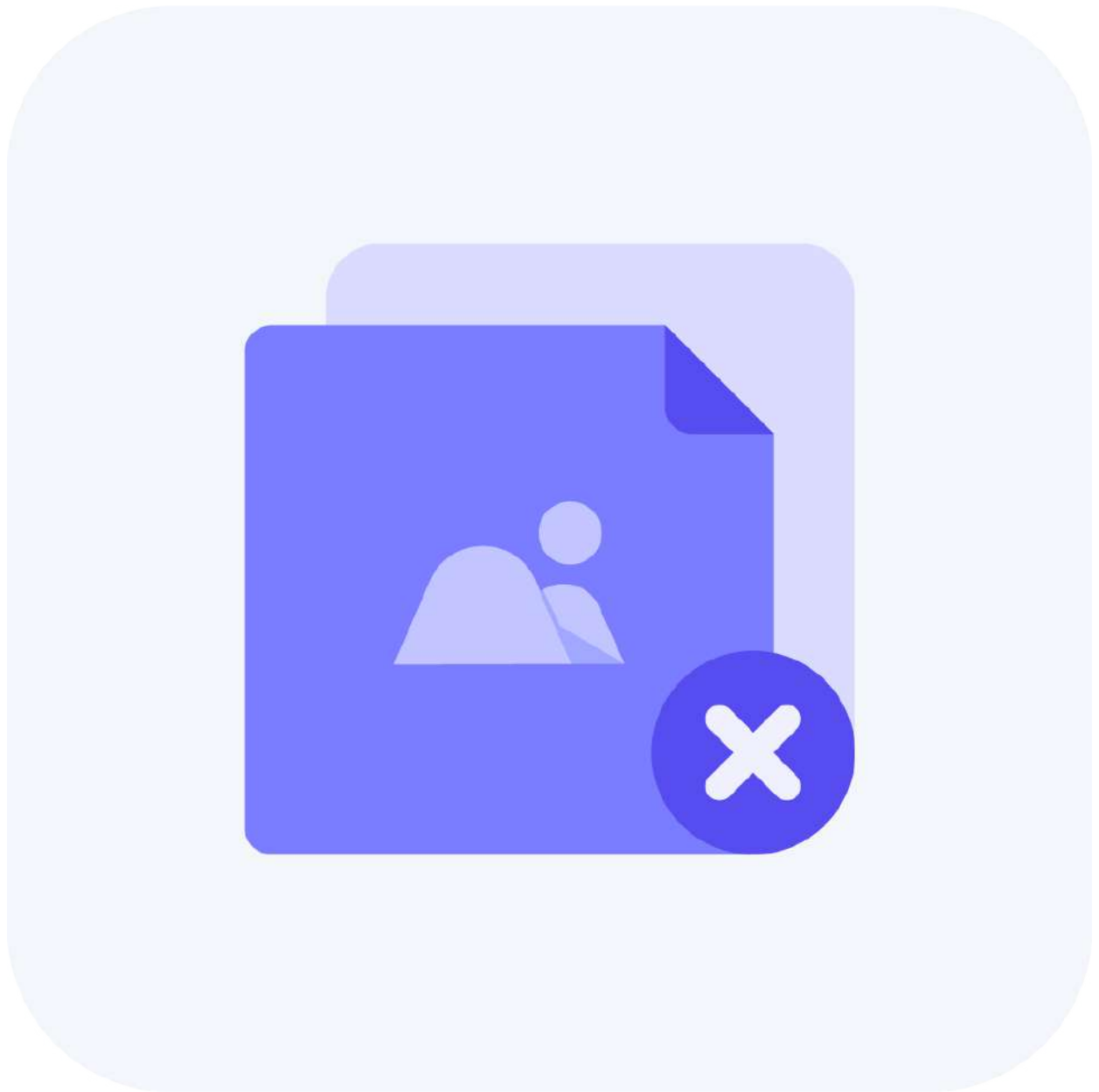
Photo 2



Photo 3

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.	
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

1 flagged, 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

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

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
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
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

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
 27.02.2023 10:53 PST

Appendix



Photo 1



Photo 2



Photo 3