HVAC Maintenance Checklist: Spring Cooling Tune-Up

Items marked TECH need a trained technician; refrigerant work needs an EPA Section 608 certified technician.

Customer		Address	
Equipment (AC / heat pump / ductless)		Model / serial	
Visit date		Technician	

General

- ☐ Review thermostat settings and schedule with customer
- ☐ Inspect / replace air filter (size: _____ rating: MERV ____)
- ☐ TECH: Tighten electrical connections
- ☐ TECH: Measure voltage and current on motors (record readings below)
- ☐ TECH: Lubricate moving parts where required
- ☐ TECH: Check system controls for safe operation
- ☐ TECH: Check starting cycle (starts, runs, shuts off properly)
- ☐ Inspect and flush condensate drain and trap

Cooling specific

- ☐ TECH: Clean evaporator coil (or note access limits)
- ☐ TECH: Clean outdoor condenser coil; clear debris around unit
- ☐ TECH (EPA 608 certified): Check refrigerant charge; adjust if needed
- ☐ TECH: Inspect refrigerant lines and insulation
- ☐ TECH: Clean and adjust blower components for proper airflow
- ☐ Check supply and return registers are open and unblocked

Supply temp		Return temp	
Voltage / amps		Customer initials	

Notes / recommended repairs

HVAC Maintenance Checklist: Fall Heating Tune-Up

Gas, oil and combustion items are for a licensed technician only.

Customer		Address	
Equipment (furnace / heat pump / boiler)		Model / serial	
Visit date		Technician	

General

- ☐ Review thermostat heating schedule with customer
- ☐ Inspect / replace air filter
- ☐ TECH: Tighten electrical connections; measure voltage and motor current
- ☐ TECH: Lubricate moving parts where required
- ☐ TECH: Check controls and safety switches
- ☐ TECH: Verify starting cycle (ignition, run, shutdown)
- ☐ Inspect condensate drain (high-efficiency furnace / heat pump)

Heating specific (licensed technician only)

- ☐ Check all gas (or oil) connections for leaks
- ☐ Measure gas pressure (reading: _____)
- ☐ Inspect and clean burner; check flame and combustion
- ☐ Inspect heat exchanger for cracks or corrosion
- ☐ Check flue / venting for blockage and secure joints
- ☐ Test carbon monoxide alarm near equipment (advise customer)
- ☐ Heat pump: check defrost operation and auxiliary heat

Notes / recommended repairs

Free template from ScopeRivo (scoperivo.com). General business information, not legal or tax advice.

Monthly Homeowner HVAC Checklist

Simple checks anyone can do. Leave electrical, refrigerant and gas work to a licensed technician.

Month		Home address	

- ☐ Check air filter; replace if dirty (date replaced: _____)
- ☐ Keep supply and return vents clear of furniture, rugs and boxes
- ☐ Clear leaves, grass clippings and debris from around the outdoor unit
- ☐ Look for water around the indoor unit or drain line
- ☐ Listen for new noises: rattling, squealing, banging
- ☐ Confirm thermostat schedule still matches your routine
- ☐ Check that carbon monoxide and smoke alarms work
- ☐ Note any rooms that are too hot or too cold
- ☐ Book the spring or fall tune-up if it is not on the calendar

Problems noticed	
Contractor name and phone	

Technician Sign-Off

Attach to any checklist in this file.

Visit type (spring / fall / RTU / other)	

- ☐ All checklist items completed (if not, list exceptions below)
- ☐ Key readings recorded: electrical / temperatures / refrigerant / gas pressure
- ☐ Safety concern found and customer informed in writing

Exceptions and why	
Refrigerant added / recovered (type, amount)	
EPA 608 cert no.	
Recommended repairs and quote no.	
Next scheduled visit	

Technician name		License no.	
Technician signature		Date	
Customer name			
Customer signature		Date	

Free template from ScopeRivo (scoperivo.com). General business information, not legal or tax advice.

HVAC Maintenance Checklist: Commercial Rooftop Unit (RTU)

Review roof access and fall protection before work. Apply lockout/tagout where required.

Site / building		Unit ID / location	
Tonnage / fuel		Model / serial	
Visit date		Technician	
Season			

Safe access

- ☐ Roof access, ladder and fall protection reviewed before work
- ☐ Disconnect located; lockout/tagout applied where required

Air side

- ☐ Replace filters (qty / size: _____)
- ☐ Inspect belts for wear and tension; replace as needed
- ☐ Check blower wheel, bearings and motor; lubricate if required
- ☐ Check economizer dampers, linkage and controls
- ☐ Inspect cabinet panels, gaskets and door seals
- ☐ Inspect curb and duct connections for air leaks

Cooling / refrigeration

- ☐ Clean condenser and evaporator coils
- ☐ TECH (EPA 608 certified): Check refrigerant pressures; record
- ☐ Inspect compressor contactors and capacitors
- ☐ Clear and flush condensate pan and drain

Heating (gas-fired RTU)

- ☐ Inspect burners, igniter and flame sensor
- ☐ Check gas pressure and connections for leaks
- ☐ Inspect heat exchanger and flue

Controls

- ☐ Verify thermostat / building controls schedule matches occupancy
- ☐ Calibrate space sensor; confirm setpoints

Supply temp		Return temp	
Amps		Pressures	
Findings / quote needed			

Free template from ScopeRivo (scoperivo.com). General business information, not legal or tax advice.