

HVAC Maintenance Checklist

The HVAC experts at ATI have put together a checklist of maintenance tasks to help those managing commercial and residential properties optimize the performance and longevity of their heating, ventilation, and air conditioning (HVAC) systems. A well-maintained HVAC system is crucial for maintaining a comfortable indoor environment, improving energy efficiency, and avoiding costly disruptions to facility operations.

This comprehensive checklist is designed to guide you through the essential tasks required to keep your HVAC system in top condition. Organized into monthly, quarterly, semiannual, and annual tasks, this checklist is a proactive approach to identify and address potential issues before they impact your entire facility.

Monthly Tasks

- Inspect air filters**
Check all air filters for dirt and clogs. Replace or clean each filter as needed.
- Unrestricted airflow around coils**
Make sure to maintain airflow around coils at all times.
- Check thermostat operation**
Verify settings and accuracy of all thermostats in your facility, recalibrating them if necessary.
- Inspect the ductwork**
Check for visible leaks, gaps, or blockages, and schedule any needed repairs. Contact a professional to have your ducts cleaned as necessary.
- Lubricate all moving parts**
To avoid friction and wear, lubricate all moving components, including fan motors and bearings.
- Inspect all drains**
Ensure drains for condensate and other fluids are clear of obstructions. Clean and flush the drains if needed.
- Update all system documentation**
Create a spreadsheet or other document where you record all maintenance activities, purchases, installations, and upgrades.





Quarterly Tasks

- Clean evaporator and condenser coils**
Coils are responsible for the efficiency of the system. Have your coils inspected and cleaned as recommended by the manufacturer.
- Check refrigerant levels**
Inspect refrigerant levels and adjust if necessary, looking for signs of leaks.
- Inspect fans**
Check for wear and tear on fan blades and belts and replace them as needed.
- Inspect electrical components**
Inspect control panels and wiring and check electrical connections for tightness.
- Test safety controls**
Verify that all safety controls are operating properly.

Semiannual Tasks

- Calibrate the sensors**
Adjust temperature and humidity sensors.
- Inspect all insulation**
Check insulation on refrigerant lines, making repairs or replacements when needed.
- Look for air leaks**
Inspect duct connections for air leaks and tighten or repair connections.
- Inspect and clean all vents and registers**
Check all vents and registers for dust and obstructions, then schedule professional cleaning to optimize airflow.



Annual Tasks

- Schedule a professional inspection**
Every year, have a qualified HVAC technician review the entire system. Regular, proactive maintenance is key to ensuring the longevity and efficiency of your HVAC system.
- Check the system's energy efficiency**
Assess the system's energy efficiency, looking for opportunities to make upgrades or other energy-saving improvements.
- Inspect the heat exchanger**
Look for any cracks or damage and make necessary repairs.
- Train your staff**
Provide refresher training for facility staff on recognizing problems with the HVAC system. Ensure they regularly review the facility's energy bills for any unusual spikes in usage. Set a plan in the event of an HVAC system failure, including access to emergency HVAC services.

Every Three to Five Years

- Clean your ducts**
Have all air ducts inspected and cleaned at least every three to five years and more frequently if your facility gathers dust or experiences a fire.

Keep in mind that this checklist is just a starting point for your facility. Be sure to customize this checklist based on your facility's specific HVAC system, climate, and any industry-specific requirements. **Reach out** to the experienced HVAC technicians at ATI if you need assistance with any of these tasks.

