



# Generic HVAC PM Checklist



## Monthly Tasks

- ☐ Check thermostat settings and operation for accuracy and responsiveness.
- ☐ Inspect and clean air filters; replace if visibly dirty or clogged.
- ☐ Visually inspect ductwork and registers for blockages or damage.
- ☐ Check condensate drain line for clogs or standing water.
- ☐ Inspect electrical connections for corrosion, wear, or overheating.

## Quarterly Tasks

- ☐ Clean evaporator and condenser coils to maintain heat transfer efficiency.
- ☐ Inspect blower assembly: motor, belt tension, and fan blades.
- ☐ Test system controls: start-up, shut-down, and safety interlocks.
- ☐ Check refrigerant levels and pressure; look for leaks or frost buildup.
- ☐ Lubricate moving parts (bearings, motors, dampers) as needed.

## Heat Exchanger-Specific Tasks

- ☐ Inspect heat exchanger surfaces for cracks, corrosion, or soot buildup.
- ☐ Perform combustion analysis (gas units) to verify efficiency and safety.
- ☐ Clean heat exchanger fins and tubes using manufacturer-approved tools.
- ☐ Check for carbon monoxide leaks near exchanger and flue outlets.
- ☐ Document exchanger condition and compare against previous inspections.

## Semi-Annual Tasks

- ☐ Review system performance logs for temperature swings or runtime anomalies.
- ☐ Clean return air grilles and supply vents to improve airflow.
- ☐ Inspect insulation and weather seals around unit and duct penetrations.
- ☐ Test emergency shut-off and reset mechanisms.

## Annual Tasks

- ☐ Schedule professional inspection and servicing of entire HVAC system.
- ☐ Replace worn components: belts, capacitors, contactors, sensors.
- ☐ Perform full safety and compliance audit (electrical, fire, ventilation).
- ☐ Inspect and certify fire suppression system (if installed near unit).

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By following this checklist, you will ensure that your HVAC Unit operates safely and efficiently, reducing downtime and extending its lifespan. For any questions or further assistance, please contact ProphetPrep support.