

Free checklist from Deepseal · usedeepseal.com/hvac-maintenance-checklist · Version: September 2026 · Built from ANSI/ACCA Standard 4, Maintenance of Residential HVAC Systems. The manufacturer's service instructions govern where they differ. Refrigerant work requires EPA Section 608 certification.

HVAC Maintenance Checklist

Residential split system: air conditioner or heat pump with a gas furnace or air handler. Part A is done on every visit, Part B on the spring (cooling) visit, Part C on the fall (heating) visit. Mark each line OK, Attn (works, but note it) or Fail (needs repair). Write the reading wherever a blank is printed.

Customer	[Name] · [Phone] · [Email]	Service address	[Street, City, State ZIP]
Date · time in/out	[Date] · [In] to [Out]	Technician	[Name]
Visit type	☐ Spring / cooling ☐ Fall / heating ☐ Both	Agreement	☐ Member, plan [Tier], visit [1] of [2], plan year [Year] ☐ Non-member
Outdoor temp (shade)	[°F]	Indoor return air	[°F] dry bulb · [°F] wet bulb

Equipment (one checklist per system)

Unit	Make and model	Serial	Year	Location
Indoor: ☐ Furnace ☐ Air handler				
Outdoor: ☐ AC ☐ Heat pump				
Filter(s)	Size(s): [e.g., 20x25x1] · MERV [] · Qty [] · ☐ Customer supplies ☐ Plan includes			
Refrigerant	☐ R-410A ☐ R-32 ☐ R-454B ☐ R-22 ☐ Other [] · Metering device: ☐ TXV/EEV ☐ Fixed orifice · Line set [ft]			
Thermostat	Model [] · ☐ Battery replaced · ☐ Wi-Fi			

Fill the nameplate rows at the first visit and carry them forward. The serial ties this visit to a specific covered unit on the maintenance agreement. A second system at the same address gets its own checklist.

Part A: Every visit

✓	Task	Check and target	Result
☐	Talk to the customer	Comfort complaints, noises, smells, water, high bills, renovations since the last visit.	Notes:
☐	Filter	Correct size and direction, housing sealed, no air bypassing the filter.	☐ Replaced ☐ Cleaned ☐ Left in
☐	Thermostat, every mode	Heat, cool, fan, emergency heat on heat pumps. Settings and schedule confirmed. Battery yearly.	☐ OK ☐ Attn ☐ Fail
☐	Registers and accessible	Open and unblocked. No crushed flex, loose	☐ OK ☐ Attn ☐ Fail

✓	Task	Check and target	Result
	duct	joints, torn insulation, moisture or growth.	
☐	Static pressure (TESP)	Total against the rated TESP on the data tag (many air handlers: 0.50 in. w.c.). Return side at or above 0.4 points to a dirty filter or a small return.	Ret [] Sup [] Total [] in. w.c. ☐ Within rating ☐ Over
☐	Line voltage and disconnect	Voltage against nameplate. Disconnect intact, correct fuse, nothing bypassed, grounded.	[V] ☐ OK ☐ Attn ☐ Fail
☐	Connections and wiring	Tighten low and high voltage. Replace heat-discolored terminals and damaged wire.	☐ OK ☐ Attn ☐ Fail
☐	Contactors and relays	Pitting, arcing, burned contacts. Replace on heavy arcing.	☐ OK ☐ Attn ☐ Fail
☐	Blower motor and wheel	Wheel tight and clean, free rotation. Amps against FLA. Oil bearings only if the manufacturer says so.	[A] vs FLA [A] ☐ Wheel clean ☐ Needs cleaning
☐	Condensate drain, trap, pan	Flush the line, clear the trap, check the pan and the secondary pan. Test the float switch. Pan tablets compatible with the coil metal.	☐ Flushed ☐ Float tested ☐ OK ☐ Attn ☐ Fail
☐	Cabinet and clearances	Panels tight, no cabinet air leaks, service and combustion clearances kept.	☐ OK ☐ Attn ☐ Fail
☐	Safeties and control board	Test pressure switch, limit, float. Board jumpers set for the application. No scorched or bulged parts.	☐ OK ☐ Attn ☐ Fail
☐	Accessories	Humidifier pad and line, UV bulb, media or electronic air cleaner, ERV/HRV filters, zone dampers.	☐ None ☐ Serviced ☐ Attn

Part B: Spring visit (cooling)

Run in cooling 15 to 20 minutes before taking readings, with the outdoor temperature inside the manufacturer's operating range.
Read return air at the grille and supply air a few feet from the coil.

✓	Task	Check and target	Result
☐	Evaporator (indoor) coil	Fins clean, straight, open. Oil at a joint means a leak: bubble-test. Line insulation intact.	☐ Clean ☐ Cleaned today ☐ Needs cleaning (quote)
☐	Condenser (outdoor) coil	Top off, clean inside out with coil cleaner and water, straighten fins, clear the base pan. Two feet of clearance all round.	☐ Cleaned ☐ Rinsed only ☐ Attn
☐	Condenser fan motor	Blade tight, no wobble, free rotation. Amps against nameplate.	[A] vs [A] ☐ OK ☐ Attn
☐	Compressor	Running amps against RLA. Note any hard-start kit.	[A] vs RLA [A] ☐ OK ☐ Attn
☐	Run capacitors, under load	Measured μF against rated. Most are rated plus or minus 6 percent; outside that, recommend replacement. No bulge, no leak.	Herm []/[] μF · Fan []/[] μF · Blower []/[] μF
☐	Air temperature split (delta T)	Return minus supply, dry bulb. Typical 16 to 22 °F at 400 CFM per ton; lower with humid return air, higher on 350 CFM per ton setups. High split = low airflow, low split = low capacity. Read it with the refrigerant numbers, never alone.	Ret [°F] Sup [°F] Split [°F]
☐	Refrigerant performance	Fixed orifice: superheat against the manufacturer's chart (indoor wet bulb, outdoor dry bulb), usually 5 to 25 °F. TXV/EEV: subcooling against the nameplate target. Probes over hoses; every hose connection loses refrigerant. Section 608 required.	Suction [psi] [°F] SH [°F] target [°F] · Liquid [psi] [°F] SC [°F] target [°F]
☐	Lines and joints	Oil stains, rubbing, missing suction insulation, service caps on and tight.	☐ OK ☐ Attn ☐ Fail
☐	Heat pumps: reversing valve and defrost	Switch to heat and back; valve shifts. Force a defrost. Outdoor drain ports open, unit raised above the snow line.	☐ N/A ☐ OK ☐ Attn ☐ Fail
☐	Finish	Panels on, disconnect pushed back in, thermostat at the customer's setting, system confirmed running before leaving.	☐ Verified running

Part C: Fall visit (heating, gas furnace)

Fire on high stage 15 to 20 minutes before measuring rise or flue gases. Wear a low-level personal CO monitor. On an unsafe condition, shut the unit down and tell the customer in writing.

✓	Task	Check and target	Result
☐	Burners	Remove and clean. Rust, debris, uneven or lifting flames when the blower starts.	☐ Cleaned ☐ OK ☐ Attn ☐ Fail
☐	Heat exchanger	Cracks, rust, bulges, water marks. Flame disturbance at blower start is a red flag. Confirm with combustion numbers, never by eye alone.	☐ OK ☐ Attn ☐ Fail, shut down
☐	Igniter	Hot surface: no cracks or white spots, cold resistance per manufacturer. Spark: gap and insulator.	[Ω] ☐ OK ☐ Attn ☐ Fail
☐	Flame sensor	Clean with fine steel wool or an abrasive pad, wipe, reinstall. Microamps in series: 0.5 to 10 μA depending on the furnace, 2 to 6 common. Replace only for a cracked insulator or an open rod.	[μA] ☐ Cleaned ☐ Replaced
☐	Gas pressure	Inlet at the inlet tap (utility if low). Manifold against the rating plate; adjust the valve. Leak-check every joint you touched.	Inlet [] Manifold [] rated [] in. w.c.
☐	Inducer and pressure switch	Inducer runs clean, no bearing noise. Switch proves; hose and port clear.	[A] ☐ OK ☐ Attn ☐ Fail
☐	Combustion analysis	Flue CO air-free: target under 100 ppm, AHRI Guideline X threshold 200. O2 and stack temperature per manufacturer. Ambient, return and supply CO: 0 target, 9 ppm maximum.	CO af [ppm] O2 [%] Stack [°F] · Ambient [ppm] Supply [ppm]
☐	Temperature rise	Supply minus return on high fire, supply probe several feet from the furnace. Inside the rating-plate range (for example 45 to 75 °F), ideally mid-range. High rise = low airflow.	Ret [°F] Sup [°F] Rise [°F] · plate [] to []
☐	Limits and safeties	High limit opens and resets. Rollout switches intact. Door switch works.	☐ OK ☐ Attn ☐ Fail
☐	Venting and combustion air	Flue or PVC intact, sloped, supported; no rust streaks, condensate or blockage; terminations clear. Combustion air per manufacturer and code. No combustibles near the vent.	☐ OK ☐ Attn ☐ Fail
☐	Condensing furnace drain	Trap cleaned, drain flowing, neutralizer media checked.	☐ N/A ☐ OK ☐ Attn
☐	Heat pumps: heating mode	Charge by the heating chart. Auxiliary heat	☐ N/A ☐ OK ☐ Attn ☐ Fail

✓	Task	Check and target	Result
		stages and amps. Defrost board test. Crankcase heater.	
☐	Finish	Panels on, thermostat at the customer's setting, home CO alarm present and tested, system confirmed running before leaving.	☐ Verified running ☐ CO alarm OK

Findings and recommendations

Item	What I found (reading, photo #)	Recommended action	Price	Customer
				☐ Approved ☐ Declined
				☐ Approved ☐ Declined
				☐ Approved ☐ Declined

Work beyond the inspection needs the customer's approval before it is done. Member discount applied: []%.

Sign-off

System condition today: ☐ Good ☐ Fair (see findings) ☐ Unsafe, shut down, customer notified in writing.

This maintenance visit was completed on **[Date]**. For maintenance agreement members, this is visit **[1]** of **[2]** for the plan year ending **[Date]**, on the unit(s) listed above. Next visit due **[Month, Year]**.

Technician signature · name · date	Customer signature · name · date

Keep a copy with the customer's equipment record and log the completed visit against the agreement. Single-system versions (AC, furnace, heat pump, tune-up, inspection, commercial) and the free agreement tracking spreadsheet: usedeepsel.com/checklists.