

Preventive Maintenance Schedule

One row per unit. The frequency and start month decide which months are due. When a visit is done, write the date in that month's box. Example: a two-truck shop's agreement base plus three light-commercial accounts, as of September 2026.

Due, month has passed	Due this month	Due later	Done (date)
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Customer / site	Unit	Frequency	Start	Tech	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Anderson, Mark	Trane XR14 4TTR4036, closet	Semiannual	Apr	Mike				4/2						Due		
Baker, Janet	Goodman GSX140361, attic	Semiannual	Apr	Danny				4/14						Due		
Castillo, Rosa	Carrier 24ACC636A003, garage	Semiannual	Mar	Mike			3/25					8/18	Due			
Dawson, Phil	Rheem RA1436AJ1NA, closet	Semiannual	Apr	Danny				Due						Due		
Ellis, Tanya	Lennox ML14XC1-036, attic	Semiannual	May	Mike					5/6						Due	
Foster, Greg	Trane XR13 4TTR3030, side ya	Semiannual	Apr	Danny				4/21						Due		
Garcia, Luis	Carrier 24VNA936A003, closet	Semiannual	Jun	Mike						Due						Due
Hughes, Dana	Goodman GSX160361, garage	Semiannual	Mar	Danny			3/30						Due			
Ingram, Steve	Rheem RA1448AJ1NA, attic	Semiannual	Apr	Mike				4/8				8/25		Due		
Jensen, Karen	Lennox XC21-036, closet	Semiannual	Apr	Danny				4/30						Due		
Kowalski, Ben	Trane XR14 4TTR4030, side ya	Semiannual	Apr	Mike				4/17						Due		
Lopez, Maria	Carrier 24ACC636A003, garage	Semiannual	Mar	Danny			3/19					8/27	Due			
Mitchell, Ray	Goodman GSX140301, closet	Semiannual	Apr	Mike				4/3						Due		
Nguyen, An	Lennox ML14XC1-048, attic	Semiannual	May	Danny					5/12						Due	
O'Brien, Kate	Rheem RA1636AJ1NA, closet	Semiannual	Apr	Mike				4/27						Due		
Patel, Raj (unit 1)	Trane XV18 4TTV8036, downsta	Semiannual	Apr	Danny				4/24				8/20		Due		
Patel, Raj (unit 2)	Trane XV18 4TTV8024, upstairs	Semiannual	Apr	Danny				4/24				8/20		Due		
Reyes, Carlos	Goodman GSX130361, garage	Semiannual	Mar	Mike			3/27					8/12	Due			
Sullivan, Pat	Carrier 24ABB336A003, side ya	Semiannual	Apr	Danny				Due						Due		
Thompson, Erin	Rheem RA1424AJ1NA, closet	Semiannual	May	Mike					5/29						Due	
Walsh, Tom	Lennox XC25-036, attic	Semiannual	Apr	Danny				4/9						Due		
Young, Brenda	Trane XR16 4TTR6036, garage	Semiannual	Apr	Mike				4/28				8/14		Due		
Triangle Dental, Cary N	Carrier 48TC 5-ton RTU-1, roof	Quarterly	Jan	Mike	1/12			4/9			7/14			Due		
Cary Community Church	Lennox LGH 7.5-ton RTU-1, roo	Semiannual	Mar	Danny			3/11						Due			
Cary Community Church	Lennox LGH 7.5-ton RTU-2, roo	Semiannual	Mar	Danny			3/11						Due			
Millbrook Dry Cleaners	Make-up air unit, back wall	Monthly	Jan	Mike	1/6	2/3	3/3	4/7	5/5	6/2	7/7	8/4	Due	Due	Due	Due

Preventive Maintenance Schedule (blank)

Company: _____ Year: _____ Prepared by: _____ Frequency: M = monthly, Q = quarterly, S = spring and fall, A = annual

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Task list by equipment and interval

Minimum intervals from the ENERGY STAR maintenance checklist, ACCA Standard 4 (residential) and ASHRAE/ACCA Standard 180 (commercial). Adjust for dust, pets, run hours and what the manufacturer's manual says.

Equipment	Task	How often	Best month(s)	Standard or source	Checklist page
Any forced-air system	Check the 1-inch filter; replace it when loaded	Check monthly; replace every 1 to 3 months	Every month	ENERGY STAR maintenance checklist	usedeepseal.com/hvac-maintenance-checklist
Any forced-air system	Replace 4 to 5 inch media filter	Every 6 to 12 months	Spring and fall visits	Filter manufacturer guidance	usedeepseal.com/hvac-maintenance-checklist
Air conditioner or heat pump (cooling)	Clean condenser coil; check refrigerant charge and temperature split; clear condensate drain; test capacitor and contactor; check blower amps	Annually	March to May	ENERGY STAR checklist; ACCA 4 Checklists 5.7 and 5.8	usedeepseal.com/ac-maintenance-checklist
Gas furnace	Inspect heat exchanger, burners, flame sensor, gas pressure, venting; test safety controls	Annually	September to November	ENERGY STAR checklist; ACCA 4 Checklist 5.4	usedeepseal.com/furnace-maintenance-checklist
Heat pump (heating)	Test defrost cycle, auxiliary heat and reversing valve	Annually	September to November	ACCA 4 Checklist 5.8-HP	usedeepseal.com/heat-pump-maintenance-checklist
Thermostat	Replace battery; check wiring and settings	Annually	Fall visit	ACCA 4 Checklist 5.3	usedeepseal.com/hvac-inspection-checklist
UV lamp (if fitted)	Check lamp; replace per manufacturer (usually yearly)	Quarterly check	Each visit	ASHRAE/ACCA Standard 180 Table 5-2	usedeepseal.com/hvac-maintenance-checklist
Condensate pump	Check and clean	Annually	Spring visit	ASHRAE/ACCA Standard 180 Table 5-7	usedeepseal.com/ac-maintenance-checklist
Whole residential system	Full inspection with readings written down	Once per season of use (spring and fall)	March to May; September to November	ACCA 4 section 5.4	usedeepseal.com/hvac-inspection-checklist
Rooftop unit	Filters; UV lamp	Quarterly	Jan, Apr, Jul, Oct	ASHRAE/ACCA Standard 180 Table 5-22	usedeepseal.com/commercial-hvac-maintenance-checklist
Rooftop unit	Belt tension and sheaves; controls; P-trap; heat-exchange surface fouling; coil condition	Semiannually	Spring and fall	ASHRAE/ACCA Standard 180 Table 5-22	usedeepseal.com/commercial-hvac-maintenance-checklist
Rooftop unit	Refrigerant temperatures; contactor; fan blades; drain pan growth; condenser surfaces; combustion section; dampers	Annually	Spring (cooling side), fall (heating side)	ASHRAE/ACCA Standard 180 Table 5-22	usedeepseal.com/commercial-hvac-maintenance-checklist
Air handler	Filters; UV lamp	Quarterly	Jan, Apr, Jul, Oct	ASHRAE/ACCA Standard 180 Table 5-2	usedeepseal.com/commercial-hvac-maintenance-checklist
Air handler	P-trap; VFD; controls	Semiannually	Spring and fall	ASHRAE/ACCA Standard 180 Table 5-2	usedeepseal.com/commercial-hvac-maintenance-checklist
Condensing unit (commercial)	Controls; belts and sheaves; VFD	Semiannually	Spring and fall	ASHRAE/ACCA Standard 180 Table 5-8	usedeepseal.com/commercial-hvac-maintenance-checklist
Condensing unit (commercial)	Refrigerant pressures; contactor; fan blades; coil fouling; condenser surfaces	Annually	Spring	ASHRAE/ACCA Standard 180 Table 5-8	usedeepseal.com/commercial-hvac-maintenance-checklist
Exhaust, supply and return fans	Belt tension and wear	Semiannually	Spring and fall	ASHRAE/ACCA Standard 180 Table 5-14	usedeepseal.com/commercial-hvac-maintenance-checklist
Exhaust, supply and return fans	Bearings; drive alignment; fan blades; dampers	Annually	Fall	ASHRAE/ACCA Standard 180 Table 5-14	usedeepseal.com/commercial-hvac-maintenance-checklist
Air distribution	Clean grilles, registers and diffusers	Semiannually	Spring and fall	ASHRAE/ACCA Standard 180 Table 5-1	usedeepseal.com/commercial-hvac-maintenance-checklist
Combustion furnace or unit heater (commercial)	Oil fuel filter monthly; air filters quarterly; heat exchanger, burner, flue and safeties annually	Monthly / quarterly / annually	Fall for the annual items	ASHRAE/ACCA Standard 180 Table 5-16	usedeepseal.com/commercial-hvac-maintenance-checklist
Every unit	Write the visit and its readings into the equipment log	Every visit	Every visit	Your own records	usedeepseal.com/equipment-maintenance-log-template