

Planned Maintenance Checklist

Date: _____ PMA# _____
 Job No _____
 Job Name _____
 Jobsite Address _____
 Type of inspection Annual _____ Quarterly _____

Model No _____
 Serial No _____
 Unit Location _____ Unit # _____
 Technician _____

Electric Heat

Voltage to elements #1 ___ #2 ___ #3 ___ #4 ___
 Amp draw #1 ___ #2 ___ #3 ___ #4 ___
 Temperature rise RA ___ SA ___ TD ___
 Indoor fan motor Volts ___ Amps ___
 Condensate pump freeze protection: Yes ___ No ___ How ___

Gas Heat

Safety Controls _____
 Induced draft blower ___ Free ___ Amps ___ Volts ___
 Check for gas leaks ___ Check flue cap ___
 Check diverter ___ Check unit cycle ___
 Other: _____

Supply Blower

Check fan rotation _____ Blower alignment _____
 Belt condition ___ Tension OK ___ Tightened ___
 Blower motor: Amps ___ Volts ___ NPA ___
 Oil blower motor: Yes ___ No ___

Filters

Qty ___ Size ___ X ___ X ___ Type ___
 Qty ___ Size ___ X ___ X ___ Type ___
 Qty ___ Size ___ X ___ X ___ Type ___
 Qty ___ Size ___ X ___ X ___ Type ___

Other Equipment

Electronic Air Cleaner
 Make _____ Model _____
 Condition of cells: _____
Humidifier
 Make _____ Model _____
 Check controls _____ Filter shape _____

Controls

Stat Model _____ Time clock set _____
 Location OK _____ System switch OK _____
 Anticipator setting W1 _____ W2 _____
 Fan switch operation: OK _____ System switch OK _____
 Check outdoor stat: OK _____ NA _____

Air Conditioning or Heat Pump System

Total unit: NP Voltage ___ NP Pumps ___
 Total unit: Actual Voltage ___ Actual Amps ___
 Discharge press ___ Suction press ___ S. Temp ___
 Outside Air Dry Bulb ___° Indoor Air Dry Bulb ___°
 Outside Air Wet Bulb ___° Indoor Air Wet Bulb ___°
 Compressor Amps ___ Volts ___
 ODFM Amps ___ Volts ___
 Sight Glass: Clear ___ Bubbles ___
 Outdoor Coil: circle one **Clean Spotty Dirty Plugged**
 Indoor Coil: circle one **Clean Spotty Dirty Plugged**
 Freon Charge: circle one **Okay Low Over**
 Defrost cycle initiation/ termination setting _____
 Check condensate drains ___ Check drain pan/s ___
 Is condensate trapped? _____

General System

Audio level at diffusers: **Loud Acceptable Low**
 Audio level at equipment: **Loud Acceptable Low**
 Overall System comfort level: **Acceptable Unacceptable**
 Thermostat temperature reading _____
 Are all panels secured with all screws as designed? _____
 Does unit have power? Yes ___ No ___
 Company stickers on equipment? ___ On stat? ___
 Customer instructed on: _____
 Stat operation? _____
 Equipment Operation? _____
 Filter maintenance? _____
 Planned maintenance? _____

Before Leaving Jobsite

Additional comments/ follow-up required? _____
 Other Comments: _____

_____ Date _____ Service Technician _____

_____ Customer Acknowledgement _____