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Inspection Details

Report #:
Location:
Inspection Date:
Inspector Name:

Asset Details

Asset Category:
Asset Name:
Asset #:
Inventory#:
Meter Reading:
Model/Year:

HVAC Inspection and Maintenance Checklist

Task Description	Pass	Fail	NA	Comments
Installation and Commissioning				
- Verify proper installation of HVAC components				
- Check for proper sizing and compatibility of equipment				
- Test and calibrate controls and safety devices				
- Ensure proper airflow, temperature, and humidity levels				
- Document installation details and commissioning results				
Routine Maintenance (Monthly/Quarterly)				
- Inspect and clean air filters				
- Check and adjust thermostat settings				
- Lubricate moving parts, such as motors and bearings				
- Check and tighten electrical connections				
- Inspect and clean condensate drain pans and lines				
- Check refrigerant levels and adjust if necessary				
- Inspect and clean evaporator and condenser coils				
- Check and adjust belts for proper tension				
- Test safety controls and devices				
- Document all maintenance tasks performed				
Semi-Annual Maintenance				
- Perform all routine maintenance tasks				
- Check and clean burners, pilot assemblies, and ignition systems				
- Inspect and clean heat exchangers				
- Check and adjust gas pressure				
- Inspect and clean chimney and flue systems				
- Test and calibrate temperature and pressure controls				
- Check and adjust blower motor alignment and balance				
- Inspect ductwork for leaks, damage, or obstructions				

- Document all maintenance tasks performed				
Annual Maintenance				
- Perform all semi-annual maintenance tasks				
- Inspect and clean air handling units				
- Check and adjust combustion efficiency				
- Inspect and clean cooling towers and water treatment systems				
- Test and calibrate economizer controls				
- Inspect and clean outdoor air intakes and screens				
- Perform infrared inspection of electrical components				
- Conduct a complete system performance test				
- Document all maintenance tasks performed				
Safety Inspections				
- Test and inspect fire dampers and smoke detectors				
- Check for proper ventilation and exhaust in confined spaces				
- Inspect and test emergency shut-off valves and switches				
- Ensure proper storage and handling of refrigerants and chemicals				
- Verify the presence and condition of safety signage and labels				
- Document all safety inspection findings and corrective actions				
Energy Efficiency Assessments				
- Monitor and analyze energy consumption data				
- Identify opportunities for energy savings and optimization				
- Evaluate the feasibility of upgrading to high-efficiency equipment				
- Assess the effectiveness of control strategies and setpoints				
- Document energy efficiency findings and recommendations				
Repair and Replacement				
- Diagnose and troubleshoot system malfunctions				
- Repair or replace faulty components as needed				
- Perform emergency repairs to minimize downtime				
- Evaluate the cost-effectiveness of repairs versus replacement				
- Update maintenance records and equipment inventories				
Training and Documentation				
- Provide training for maintenance staff on HVAC systems and procedures				
- Develop and maintain standard operating procedures (SOPs)				
- Create and update maintenance logs, checklists, and reports				
- Maintain accurate records of equipment specifications and warranties				
- Ensure compliance with relevant codes, standards, and regulations				