



HVAC Preventive Maintenance Checklist

Occupant-area observations and accessible visual checks

FREE PROFESSIONAL TEMPLATE | AMERICA RUNS ON WAFFLES | TROY COLEMAN

RESTAURANT / SITE NAME

UNIT / ASSET ID

INSPECTION DATE AND TIME

SERVED AREA

INSPECTOR NAME AND ROLE

MANUFACTURER / MODEL / SERIAL

OCCUPANT-AREA OBSERVATIONS

OBSERVATION	OK	MONITOR	SERVICE	URGENT	N/A
Thermostat or control display appears intact and readable.	☐	☐	☐	☐	☐
Space condition is compared with the site's approved temperature range.	☐	☐	☐	☐	☐
Airflow is present at representative supply locations.	☐	☐	☐	☐	☐
Return and supply grilles appear unobstructed.	☐	☐	☐	☐	☐
No unusual odor, noise, vibration, or visible moisture is observed.	☐	☐	☐	☐	☐
No recurring alarm or fault is reported.	☐	☐	☐	☐	☐
Any comfort complaint includes the exact area, time, and operating mode.	☐	☐	☐	☐	☐

ACCESSIBLE VISUAL CHECKS

OBSERVATION	OK	MONITOR	SERVICE	URGENT	N/A
Accessible filter condition is recorded without opening hazardous compartments.	☐	☐	☐	☐	☐
Exterior cabinet, visible panels, and fasteners appear intact.	☐	☐	☐	☐	☐
Accessible condensate area shows no visible overflow or leakage.	☐	☐	☐	☐	☐
Outdoor unit area is free of obvious debris and stored material.	☐	☐	☐	☐	☐
Required access and airflow space appears unobstructed.	☐	☐	☐	☐	☐
Visible duct insulation shows no obvious damage or condensation.	☐	☐	☐	☐	☐
Roof or ground housekeeping around the unit is acceptable.	☐	☐	☐	☐	☐
No evidence of tampering or unauthorized access is observed.	☐	☐	☐	☐	☐



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Operating readings, qualified service, and follow-up

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SPACE TEMPERATURE / APPROVED RANGE

RETURN AIR READING

SUPPLY AIR READING

FILTER TYPE / SIZE / SERVICE DATE

LAST QUALIFIED SERVICE DATE

NEXT PLANNED SERVICE DATE

QUALIFIED-TECHNICIAN SERVICE RECORD

OBSERVATION	OK	MONITOR	SERVICE	URGENT	N/A
Manufacturer service checklist is attached or referenced.	☐	☐	☐	☐	☐
Electrical inspection is completed by a qualified person.	☐	☐	☐	☐	☐
Refrigerant-circuit inspection is completed by a qualified person.	☐	☐	☐	☐	☐
Combustion or heating safety inspection is completed when applicable.	☐	☐	☐	☐	☐
Condensate system is professionally inspected.	☐	☐	☐	☐	☐
Belts, bearings, motors, controls, and safeties are inspected.	☐	☐	☐	☐	☐
Measured operating data is attached or recorded in the service report.	☐	☐	☐	☐	☐
Deficiencies and recommended follow-up are documented.	☐	☐	☐	☐	☐

DEFICIENCIES, PROTECTIVE ACTION, AND FOLLOW-UP

OBSERVATION / DEFICIENCY / IMMEDIATE PROTECTIVE ACTION

PERSON NOTIFIED AND TIME

SERVICE PROVIDER / WORK ORDER

FOLLOW-UP OWNER AND TARGET DATE

MANAGER REVIEW / DATE

TECHNICIAN REVIEW / DATE

COMPLETION / RETURN-TO-SERVICE DATE