FREE DOWNLOAD · HVAC FUNDAMENTALS SERIES

Spring & Summer HVAC Maintenance Checklist

Print it. Use it every season. Share it with your customers.

32 Checklist Items	2 Sections	DIY & Pro Tasks	Print Friendly

HOW TO USE THIS CHECKLIST

Complete DIY tasks yourself before calling a technician. Items marked PRO ONLY require a licensed HVAC technician with proper tools and certifications. HIGH PRIORITY items should be done first — skipping them risks equipment damage or safety issues.

1 DIY Homeowner Tasks

Do these yourself before the cooling season — no tools required beyond basic household items

- [ ] **Replace or clean the air filter** — HIGH PRIORITY
  Check filter every 30 days; replace 1-inch filters monthly, 4-inch filters every 6–12 months
- [ ] **Test the thermostat**
  Switch to COOL mode, set 5° below room temp, confirm the system starts within a few minutes
- [ ] **Check all supply and return vents**
  Make sure furniture, curtains, and rugs aren't blocking any vents — blocked vents strain the system
- [ ] **Clear debris around the outdoor unit** — HIGH PRIORITY
  Remove leaves, mulch, and vegetation; maintain 18–24 inches of clearance on all sides
- [ ] **Gently rinse the outdoor condenser coil**
  Use a garden hose (low pressure) to wash dirt off the coil fins from top to bottom — never a pressure washer
- [ ] **Straighten bent condenser fins**
  Use a fin comb (available at hardware stores) to carefully straighten crushed aluminum fins
- [ ] **Check and flush the condensate drain line** — HIGH PRIORITY
  Pour 1 cup of diluted white vinegar or bleach down the drain line to prevent algae clogs
- [ ] **Inspect the condensate drain pan**
  Look for standing water, rust, or mold — standing water means the drain is already clogged
- [ ] **Check refrigerant line insulation**
  Inspect the foam insulation on the suction line (larger copper pipe); replace if cracked or missing
- [ ] **Listen for unusual noises on startup**
  Banging, rattling, or squealing indicate loose components or failing bearings — call a tech

- [ ] **Inspect accessible ductwork**
  Look for obvious disconnections, holes, or crushed sections in visible duct runs

- [ ] **Test all circuit breakers**
  Reset any tripped breakers; if a breaker trips repeatedly after reset, call an electrician

- [ ] **Clean the indoor air handler cabinet exterior**
  Wipe down the cabinet, check that the access panels are properly secured

- [ ] **Verify outdoor unit is level**
  The unit should be level or slightly tilted toward the condensate drain; level with shims if needed

- [ ] **Check window seals and weatherstripping**
  Air leaks around doors and windows force your AC to work much harder — seal gaps with weatherstrip tape

- [ ] **Replace smoke and CO detector batteries**
  While you're doing seasonal maintenance — this is the reminder to check life-safety devices too

2 Professional Service Tasks

Schedule an annual tune-up with a licensed HVAC technician — ideally in early spring

- [ ] **Measure and verify refrigerant charge (superheat/subcooling)** HIGH PRIORITY
  Low charge = compressor damage. Requires EPA Section 608 certification to handle refrigerant

- [ ] **Check for refrigerant leaks** HIGH PRIORITY
  Electronic leak detection on all joints, fittings, and coil connections

- [ ] **Clean evaporator coil (chemical wash)** HIGH PRIORITY
  Dirty evaporator coils dramatically reduce heat transfer efficiency and can cause icing

- [ ] **Measure system static pressure**
  Identifies airflow restrictions in ductwork that waste energy and reduce comfort

- [ ] **Test and calibrate thermostat accuracy**
  Verify thermostat temperature readings match calibrated thermometer at the unit

- [ ] **Inspect and test capacitors** HIGH PRIORITY
  Start and run capacitors degrade over time; a failing capacitor is the #1 cause of no-start calls

- [ ] **Check and tighten all electrical connections**
  Loose connections cause voltage drops, overheating, and component failure

- [ ] **Lubricate motor bearings (where applicable)**
  Older PSC motors require oiling; ECM motors are sealed and do not require lubrication

- [ ] **Measure supply/return air temperature split**
  A properly charged, functioning system should deliver 16–22°F temperature difference across coil

- [ ] **Inspect contactor and relay condition**
  Pitted or burned contacts cause intermittent operation and eventual hard failure

- [ ] **Verify proper condensate trap and drain operation**
  Confirm proper trap depth, drain slope, and check for microbial growth in drain pan

- [ ] **Test defrost controls (heat pump systems)**
  Verify defrost board, sensor, and timer operation before heating season

- [ ] **Inspect and seal accessible duct connections**
  Duct leakage typically wastes 20–30% of conditioned air — sealing is high ROI

- [ ] **Check economizer operation (commercial systems)**
  Verify damper actuator, position sensor, and differential enthalpy controls are functioning

- [ ] **Document system operating conditions**
  Record suction/discharge pressures, temps, amps, and volts for future comparison baseline

- [ ] **Inspect heat exchanger for cracks (gas furnace/air handler)** HIGH PRIORITY
  A cracked heat exchanger leaks CO into living space — this is a safety-critical inspection

❄ SPRING STARTUP (March–May)

- Complete full DIY checklist
- Schedule professional tune-up
- Replace air filter (fresh start)
- Test AC 2–3 weeks before hot weather

■ SUMMER ONGOING (June–Aug)

- Check filter every 30 days
- Clear debris after storms
- Check drain line monthly
- Watch for ice on indoor coil

■■ SAFETY REMINDER

Always turn off power at the thermostat AND the disconnect box before performing any work near the outdoor unit or air handler. Never attempt to add refrigerant yourself — handling refrigerant without EPA Section 608 certification is a federal violation. If your system is over 15 years old, ask your technician about

! Call a Technician Immediately If...

These symptoms indicate a potentially serious problem — don't delay

- [ ] **System blows warm air despite running continuously**
  May indicate refrigerant leak, failed compressor, or frozen evaporator coil

- [ ] **You smell burning or electrical odors from any unit**
  Immediately shut off the system and call — electrical fires are a serious risk

- [ ] **Ice forms on the indoor unit or refrigerant lines**
  Indicates airflow blockage or low refrigerant — running longer causes compressor damage

- [ ] **Water is dripping from the indoor air handler**
  Clogged drain line or frozen coil — can cause significant ceiling/wall water damage

- [ ] Circuit breaker trips repeatedly after reset
  Indicates a short circuit or overloaded component — do not continue resetting
- [ ] Loud banging, clanking, or grinding from outdoor unit
  Loose or broken component — continued operation risks catastrophic compressor failure

FOUND THIS CHECKLIST USEFUL?

Visit YourSite.com for more HVAC guides, refrigeration resources, and DIY maintenance tutorials.

Share this PDF freely — please keep the footer credit intact.