# HVAC Inspection Checklist

A room-by-room guide to inspecting a home heating and cooling system: what a homeowner can check, and what a licensed technician should test once a year.

CPI Service
Plumbing · HVAC · Residential · Commercial

Property address _____ Date _____

System type and age _____ Inspected by _____

HOMEOWNER safe to check yourself TECHNICIAN needs a licensed pro (gas, electrical, refrigerant, combustion)

## 1 Heating System

### Gas furnace

- [ ] Air filter is clean and the right size (replace every 1 to 3 months in heavy use) HOMEOWNER
- [ ] Burners are clean, free of corrosion, with an even blue flame TECHNICIAN
- [ ] Igniter works; flame sensor cleaned and tested TECHNICIAN
- [ ] Heat exchanger inspected for cracks or corrosion TECHNICIAN
- [ ] Gas valve and connections leak-tested TECHNICIAN
- [ ] Flue and vent clear, secure and drafting properly TECHNICIAN
- [ ] Limit, pressure and rollout switches tested TECHNICIAN
- [ ] Blower motor and wheel clean and running smoothly TECHNICIAN

### Heat pump

- [ ] Outdoor coil clean, with no heavy ice buildup in winter HOMEOWNER
- [ ] Refrigerant charge and pressures checked; any leak found and repaired (a low charge means a leak, not a routine top-off) TECHNICIAN
- [ ] Reversing valve switches smoothly between heating and cooling TECHNICIAN
- [ ] Defrost cycle operating correctly TECHNICIAN
- [ ] Outdoor fan, capacitor and electrical connections inspected TECHNICIAN

### Boiler (if present)

- [ ] Pressure and temperature within the normal range TECHNICIAN
- [ ] Expansion tank and relief valve working; piping free of leaks and corrosion TECHNICIAN

## 2 Cooling System

- [ ] Outdoor unit has about 2 feet of clearance; leaves and debris removed HOMEOWNER
- [ ] Condensate drain line flowing; drain pan dry HOMEOWNER
- [ ] Condenser coil cleaned; fins straight TECHNICIAN
- [ ] Evaporator coil inspected and cleaned if dirty TECHNICIAN
- [ ] Refrigerant charge checked; leaks found and repaired rather than topped off TECHNICIAN
- [ ] Capacitor, contactor and condenser fan motor tested TECHNICIAN

- [ ] Ductless mini-splits: filters cleaned, heads and drains checked — TECHNICIAN

## 3 Ventilation and Ductwork

- [ ] Supply vents and returns open and unblocked by furniture or rugs — HOMEOWNER
- [ ] Bathroom and kitchen exhaust fans running and venting outdoors — HOMEOWNER
- [ ] Ducts in attic and crawl space connected, sealed and not crushed — TECHNICIAN
- [ ] Duct insulation intact in unconditioned spaces — TECHNICIAN
- [ ] Airflow balanced; rooms heat and cool evenly — TECHNICIAN
- [ ] Air cleaner, humidifier or fresh-air system serviced, if installed — TECHNICIAN

## 4 Thermostat and Controls

- [ ] Thermostat reads room temperature accurately; batteries fresh — HOMEOWNER
- [ ] System responds when modes and set points change; schedules and Wi-Fi working — HOMEOWNER
- [ ] Thermostat wiring secure and compatible with the equipment — TECHNICIAN

## 5 Electrical Components

- [ ] Wiring free of wear, corrosion or overheating; connections tightened — TECHNICIAN
- [ ] Capacitors, contactors and relays tested — TECHNICIAN
- [ ] Control board checked for fault codes — TECHNICIAN
- [ ] Breakers and outdoor disconnect in good condition — TECHNICIAN

## 6 Outdoor Equipment

- [ ] Unit level on its pad; cabinet and fins undamaged — HOMEOWNER
- [ ] Refrigerant line insulation intact — HOMEOWNER
- [ ] No weeds, plants or stored items against the unit — HOMEOWNER

## 7 Insulation and Air Sealing

- [ ] Attic insulation even and at a healthy depth — HOMEOWNER
- [ ] Weatherstripping on doors and windows intact — HOMEOWNER
- [ ] Gaps sealed around ducts, registers and the attic hatch — TECHNICIAN

## 8 Safety Checks

- [ ] Carbon monoxide alarms installed and tested (required in California homes with gas appliances or an attached garage) — HOMEOWNER
- [ ] Storage and flammable products kept clear of the furnace and water heater — HOMEOWNER
- [ ] Gas lines and appliance connections leak-free — TECHNICIAN
- [ ] Combustion gases venting outdoors (no spillage at the furnace or water heater) — TECHNICIAN

- [ ] Safety switches (limit, rollout, condensate float) tested — TECHNICIAN
- [ ] Equipment properly grounded; service disconnects working — TECHNICIAN

## 9 Performance Testing

- [ ] Heating: temperature rise between return and supply air within spec — TECHNICIAN
- [ ] Cooling: temperature split within spec — TECHNICIAN
- [ ] Motor and compressor amp draw normal — TECHNICIAN
- [ ] No short cycling, unusual noise or vibration — TECHNICIAN

### If you smell gas

Leave the home right away without using light switches or phones, then call 911 and PG&E from outside. Don't look for the leak yourself.

### Notes and follow-up

### Schedule your annual HVAC inspection

CPI Service inspects, maintains and repairs heating and cooling systems throughout San Jose and the South Bay. Our membership plans include annual HVAC maintenance for one system.

**(408) 549-8181**

This checklist is a general guide. Gas, electrical, refrigerant and combustion work should be done by a licensed technician.
cpiservice.com/checklist/hvac-inspection/