HVAC Maintenance Checklist

Monthly, seasonal and yearly tasks that keep a heating and cooling system safe, efficient and reliable, and the jobs to leave to a licensed technician.

CPI Service
Plumbing · HVAC · Residential · Commercial

Property address _____ Date _____

System type and age _____ Filter size _____

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

1 Monthly

- [ ] Check the air filter; replace every 1 to 3 months during heavy use, sooner with pets, dust or wildfire smoke — HOMEOWNER
- [ ] Check thermostat settings, schedule and batteries — HOMEOWNER
- [ ] Keep supply vents and returns open and unblocked — HOMEOWNER
- [ ] Listen for new noises and watch for short cycling, weak airflow or odd smells — HOMEOWNER

2 Each Season

- [ ] Clear about 2 feet around the outdoor unit; gently rinse dust off the fins with the power off — HOMEOWNER
- [ ] Check that the condensate drain flows and the pan under the indoor coil is dry — HOMEOWNER
- [ ] Test carbon monoxide alarms and replace batteries (required in California homes with gas appliances or an attached garage) — HOMEOWNER
- [ ] Run the AC in spring and the heat in fall before you need them — HOMEOWNER

3 Once a Year: Cooling (Spring)

- [ ] Clean the outdoor condenser coil and inspect the indoor evaporator coil — TECHNICIAN
- [ ] Check refrigerant charge and pressures; find and repair any leak (a low charge means a leak, not a routine top-off) — TECHNICIAN
- [ ] Test the capacitor, contactor and condenser fan motor — TECHNICIAN
- [ ] Clear and treat the condensate drain line — TECHNICIAN

4 Once a Year: Heating (Fall)

- [ ] Inspect burners and check for an even blue flame — TECHNICIAN
- [ ] Test the igniter and clean or test the flame sensor — TECHNICIAN
- [ ] Inspect the heat exchanger and the flue or vent — TECHNICIAN
- [ ] Leak-test gas connections and check the gas valve — TECHNICIAN
- [ ] Test limit, pressure and rollout switches — TECHNICIAN

5 Once a Year: Whole System

- [ ] Clean and inspect the blower motor and wheel; check belts on older belt-drive units — TECHNICIAN
- [ ] Tighten electrical connections; measure motor and compressor amp draw — TECHNICIAN
- [ ] Check thermostat calibration and the system's temperature split — TECHNICIAN
- [ ] Look for leaking or disconnected ducts in the attic and crawl space — TECHNICIAN
- [ ] Check duct insulation in unconditioned spaces — 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.

Maintenance log

Schedule your annual HVAC maintenance

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

(408) 549-8181

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