



FALL HVAC REVIEW CHECKLIST

Items to Review After a Heavy Texas Summer

Service History

- ☐ Review all summer service calls
- ☐ Flag repeat calls on the same unit
- ☐ Identify units with recurring leaks or cooling complaints
- ☐ Review any emergency or after-hours calls
- ☐ Confirm whether temporary fixes were followed by permanent repairs

Leaks and Drainage

- ☐ Check condensate drain lines
- ☐ Review clogged drain history
- ☐ Look for water stains or ceiling damage
- ☐ Inspect drain pans
- ☐ Confirm whether prior leaks affected electrical or tenant areas

Airflow and Cleanliness

- ☐ Replace or inspect filters
- ☐ Clean condenser coils where needed
- ☐ Check evaporator coils
- ☐ Confirm returns and supply diffusers are not blocked
- ☐ Review belts, blowers, and airflow-related complaints

Performance and Comfort

- ☐ Compare comfort complaints by zone
- ☐ Review spaces that struggled in afternoon heat
- ☐ Check thermostat schedules and setpoints
- ☐ Identify rooms with changing occupancy
- ☐ Review high-load areas separately

Controls and Scheduling

- ☐ Confirm occupied and unoccupied schedules
- ☐ Remove unnecessary overrides
- ☐ Review alarms and faults
- ☐ Confirm sensor locations still make sense
- ☐ Make sure controls match current building use

Equipment Wear

- ☐ Inspect contactors, capacitors, motors, belts, and bearings
- ☐ Review compressor or condenser fan motor concerns
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- ☐ Look for signs of overheating, vibration, or unusual noise
- ☐ Identify parts that should be replaced before failure

Maintenance Planning

- ☐ Confirm current PM frequency
- ☐ Review site notes and equipment history
- ☐ Make sure unit labeling and access instructions are current
- ☐ Document open issues from the maintenance visit
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Budget and Capital Planning

- ☐ Separate immediate repairs from future replacements
- ☐ Flag equipment nearing end of practical service life
- ☐ Identify units with rising service costs
- ☐ Gather documentation for leadership approval
- ☐ Plan before lead times or seasonal demand create pressure

SERVICE CALLS: 214-785-2129

