

Air-source heat pump annual maintenance checklist

The annual air-source heat pump service is the deep pass: the measurements, cleanings and tests a quarterly round doesn't reach. This checklist keeps the full service on record with the photos that make it defensible later. Work is commonly verified against IMC, manufacturer's published instructions. Confirm the edition your authority having jurisdiction has adopted.

Who runs it: The HVAC service tech on the annual service visit. When: Once a year, best scheduled ahead of the heating season so the defrost and backup-heat sequence is proven before it is relied on.

Coils and airflow

- ☐ Both coils cleaned and airflow restored
Outdoor and indoor coils washed through, fins combed where bent, blower and drain pan cleaned, filters renewed. 2 photos required

Refrigerant and controls

- ☐ Charge assessed by superheat and subcooling
Readings taken and compared against the unit's charging chart, not adjusted without evidence of an actual charge problem. 1 photo required
- ☐ Reversing valve and defrost control proven
Full changeover confirmed in both directions, defrost forced and terminating correctly, sensor and control response checked. 1 photo required

Backup heat and electrical

- ☐ Auxiliary heat lockout and staging tested
Backup heat locked out so the compressor is proven alone, then staging and any balance-point control brought in and confirmed. 1 photo required
- ☐ Electrical connections and contactor checked
Terminations tight, contactor and disconnect sound, amp draw on compressor and fans within the unit's published range. 1 photo required