READY TO INSPECT — FIELD CHECKLIST

Air-source heat pump quarterly maintenance checklist

A quarterly air-source heat pump round is short on purpose: it catches the wear items that fail between annual services. This checklist is sized for a tech with a phone. Every item says what to look at and the photo that proves the round happened. Work is commonly verified against IMC, manufacturer's published instructions. Confirm the edition your authority having jurisdiction has adopted.

Who runs it: The HVAC or maintenance tech on the quarterly mechanical round. When: Every quarter, ideally split so one visit lands in the heating season and one in cooling, since each mode hides different faults.

Before the round

- [ ] Building contact told before modes are forced
  Occupants or the building contact told the unit will be run in the off-season mode and through a defrost, so cold air in winter or warm air in summer is expected.
  No photo required

- [ ] Controls found in normal heat pump mode
  As found, thermostat or controller in normal heat pump operation, emergency or backup heat not left forced on, schedule and setpoints noted before any testing.
  1 photo required

Airflow and filters

- [ ] Return filters checked and seated
  Filter clean, correct size and fully seated with no air bypassing around a loose frame, gasket intact at the indoor unit.
  2 photos required

- [ ] Indoor, outdoor and any backup heat circuits locked and tagged
  Every feed locked and tagged before a panel opens: indoor unit, outdoor unit and any backup heat circuit; panels refitted and locks lifted by whoever hung them before the run checks.
  1 photo required

- [ ] Indoor coil face and drain pan checked
  Coil face clean and not iced, blower wheel free of buildup, pan draining with no standing water.
  1 photo required

Outdoor unit

- [ ] Outdoor coil and fan clearances checked
  Coil fins clear front and back, fan spins freely, required air clearance around the cabinet not blocked by storage or growth.
  2 photos required

- [ ] Base drainage and defrost meltwater path checked
  Base pan drain holes open, no ice dam at the feet of the unit, meltwater running away from the pad.
  1 photo required

- [ ] Outdoor unit mounting sound and clear of snow and roof runoff
  Stand, bracket or pad sound, level and anchored, coil held above the snow the site gets, and no gutter, eave or roof edge dripping onto the coil to freeze.
  1 photo required

Operation

- [ ] Heating and cooling changeover observed
  Unit commanded through both modes, reversing valve shifting with the expected sound and a temperature swing at the indoor coil.
  1 photo required

- [ ] Defrost cycle observed or its evidence checked
  A defrost initiated or recent evidence confirmed, outdoor coil clearing without the unit blowing cold air indoors on the changeback.
  1 photo required

- [ ] Outdoor temperature at the controls checked against a thermometer
  Outdoor reading on the thermostat or controller compared with a thermometer at the unit, sensor shaded and clear of the discharge air, since lockout and staging run from it.
  1 photo required

Handback

- [ ] Controls put back to their as-found schedule and setpoint
  Test holds cleared, mode, schedule and setpoints returned to what was noted at the start, no emergency heat left on, unit left running on its own call.
  No photo required

- [ ] Season and mode tested recorded for the next round
  Which mode was proven this visit, heating or cooling, entered against the unit so the next quarter tests the other one and nothing goes a full year unchecked.
  No photo required