

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.

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 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

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