READY TO INSPECT — FIELD CHECKLIST

Fan coil unit annual maintenance checklist

The annual fan coil unit 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 mechanical service tech on the annual, with the unit off and the space protected. When: Once a year in a shoulder season, when a room can be taken down long enough to open the cabinet and clean the coil and pan properly.

Shutdown and access

- [ ] Room outage agreed and finishes below the unit covered
  Room taken down at the time agreed with the owner or occupant, furniture and flooring below the unit covered, occupant told how long the unit will be off.
  No photo required

- [ ] Lock and tag applied and coil isolation valves closed
  Disconnect locked and tagged, isolation valves closed for valve work; valves reopened and coil bled before the procedure's temporary release for stroke, amp and control checks, then re-locked.
  1 photo required

Coil and pan

- [ ] Coil deep-cleaned and fins combed
  Coil cleaned through the full depth of the fin pack, drainage confirmed after rinse, bent fins combed, no leaks at the tube connections.
  2 photos required

- [ ] Drain pan removed, cleaned and re-pitched
  Pan pulled and scrubbed to bare surface, biological growth removed, pan and line re-pitched to drain, trap rebuilt and primed.
  2 photos required

- [ ] Drain line flushed and flow proven at the termination
  Line flushed from the pan outlet through to its termination or cleanout, water arriving freely with no slime plug, cleanout cap back on.
  1 photo required

- [ ] Cabinet lining and interior inspected
  Cabinet insulation lining intact, not wet, torn or shedding into the airstream, no rust or growth on the cabinet floor, damaged lining noted for replacement.
  1 photo required

Valves and piping

- [ ] Control valves stroked and serviced
  Two-way or three-way valves driven full range, actuators seating and opening, no weeping at packing, coil bled of trapped air.
  1 photo required

- [ ] Isolation valves and connections checked
  Isolation and balancing valves operable, flex connectors and unions dry, insulation intact on chilled-water lines.
  1 photo required

- [ ] Valve package strainer cleaned where one is fitted
  Strainer isolated, blown down or screen pulled and cleaned, debris and screen condition noted, valves reopened and the coil bled of air.
  No photo required

- [ ] Balancing valve setting read against the balance report
  Balancing or pressure-independent valve setting serving the coil read and matched to the balance report, memory stop intact, any change recorded.
  1 photo required

Motor and controls

- [ ] Motor and blower assembly serviced
  Motor bearings checked, wheel cleaned and balanced, belt or direct drive inspected, amp draw within nameplate at each speed.
  1 photo required

- [ ] Thermostat and unit controls verified
  Space thermostat calibrated, heating and cooling changeover proven, occupied and unoccupied modes working, no overrides left set.
  1 photo required

- [ ] Junction box terminations checked with the unit re-locked
  Re-locked after the powered checks: terminations tight in the junction box, no heat discoloration, flex conduit secured, any motor capacitor not bulged or leaking.
  1 photo required

Return to service

- [ ] Discharge air temperature recorded in each mode after restart
  Locks removed by the tech who hung them, unit restarted, discharge temperature read in heating and cooling and compared with last year's reading.
  1 photo required

- [ ] Annual service record filed against the unit tag
  Record lists filter size, coil and pan condition, valve and speed settings and any parts replaced, deferred repairs listed for the owner.
  No photo required