READY TO INSPECT — FIELD CHECKLIST

Fan coil unit quarterly maintenance checklist

A quarterly fan coil unit 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 maintenance tech on the quarterly unit round through the rooms and corridors. When: Every quarter, walked room by room or by floor so the filter change and the drain check happen on the same visit.

Access and lockout

- [ ] Occupant told and the space below the unit protected
  Room occupant or site contact told before entry, drop cloth or catch pan set below the cabinet, ceiling access panel opened without damaging tile or grid.
  No photo required

- [ ] Unit locked and tagged out before the cabinet is opened
  Disconnect or breaker locked, tagged and the fan proven dead on a call; float, blower and call checks run under the procedure's temporary release, people clear, then re-locked.
  1 photo required

Filter and coil face

- [ ] Filter replaced and coil face inspected
  Filter changed and correctly sized, no bypass gaps around the rack, coil face clean with no matting or bent fins visible behind the filter.
  2 photos required

- [ ] New filter label read against the unit schedule
  Label on the filter frame shows the size and efficiency rating listed on the unit schedule or the site's filter list, not a thinner or lower grade substitute.
  1 photo required

Condensate

- [ ] Drain pan clear and trap holding
  Pan draining fully with no standing water or biological growth, trap primed, drain line flowing to termination with no back-up.
  2 photos required

- [ ] Condensate float switch proven where fitted
  Float switch lifted to confirm it interrupts the unit or fires the alarm, secondary pan dry where the unit sits over occupied space.
  No photo required

- [ ] Valve package and piping dry outside the pan
  Valve bodies, unions and coil connections not weeping, chilled water piping not sweating past the pan edge, insulation dry and closed at the cabinet entry.
  1 photo required

- [ ] Ceiling and finishes below the unit free of water marks
  Ceiling tile, walls and floor below and beside the unit free of stains, drips or swelling, any new mark traced back to the pan, trap or a piping joint.
  1 photo required

Blower and operation

- [ ] Blower running clean and quiet
  Wheel free of dust build-up, set screw tight, motor mounts sound, no rattle, imbalance or bearing noise at each speed tap.
  1 photo required

- [ ] Unit heats and cools on a call
  Heating and cooling each commanded from the thermostat, discharge temperature responding, no unusual valve or fan behavior.
  1 photo required

- [ ] Fan speed setting matched to the unit schedule
  Speed switch tap or ECM motor setting read and matched to the balance report or unit schedule, not left on high or low from an old comfort call.
  1 photo required

- [ ] Valve actuator following the thermostat call
  Actuator indicator or stem driving open on a call and closed once satisfied, no hunting or chatter, manual override lever back in its auto position.
  1 photo required

Return to service

- [ ] Cabinet front, filter door and access panel refastened
  Every panel back on with all its fasteners, gasket seated so air can't bypass the filter, ceiling access panel closed flush, no rattle once the fan runs.
  1 photo required

- [ ] Lock removed by the tech who hung it and the unit restarted
  Lock and tag removed by the person who applied them, unit restarted and run on a call, thermostat returned to the occupant's setpoint.
  No photo required

- [ ] Round findings logged against the unit tag and room
  Filter change, pan and drain condition, speed setting and any leak or noise logged against the unit tag and room, follow-up work listed for the annual.
  No photo required