READY TO INSPECT — FIELD CHECKLIST

Ductless mini-split quarterly maintenance checklist

A quarterly ductless mini-split 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 round, working head unit by head unit through the occupied spaces.
When: Every quarter, and ahead of each cooling and heating season since the same head runs both ways.

Access at each head

- [ ] Room occupant told and the floor below the head covered
  Occupant told before work starts in the room, furniture and electronics under the head moved or covered so drips from the filter pull land on a drop cloth.
  No photo required

- [ ] Head switched off at its controller before opening
  Head stopped at its own controller and the blower fully spun down before the front panel lifts; nothing past the filters and coil face is reached on this round.
  No photo required

Indoor units

- [ ] Filters at each head cleaned or replaced
  Every head's filters pulled, washed or swapped, and reseated, with no head skipped because its room was occupied.
  1 photo required

- [ ] Drain pan and condensate path clear
  Pan draining, condensate pump cycling and quiet where fitted, no water staining on the wall or ceiling below the head.
  2 photos required

- [ ] Indoor coil face checked with the filters out
  Coil face behind the filters looked at with a light, no dust mat, mold spotting or bent fins; heavy buildup noted so the head is cleaned at the annual.
  1 photo required

- [ ] Condensate pump safety switch tripped where fitted
  Water poured into the pump reservoir until the overflow float trips and the head stops cooling or alarms, then resets once the level drops.
  No photo required

Refrigerant lines

- [ ] Line-set insulation intact
  Insulation continuous over the suction line, no gaps, splits or UV damage where the line-set runs outside or crosses the wall penetration.
  1 photo required

- [ ] Wall penetration sealed where the lines pass
  Sleeve and sealant around the line set, drain and control cable intact inside and out, no daylight, water tracking or pest entry at the hole.
  1 photo required

- [ ] Line set strapped and protected along the outside run
  Straps or line cover holding the run without sag or kinks, lines clear of sharp edges and foot traffic, cover joints and end caps in place.
  1 photo required

Outdoor unit and operation

- [ ] Outdoor coil and fan clear
  Condenser coil free of leaves, grass and lint, fan spinning freely, unit level with clearance around it.
  1 photo required

- [ ] Base pan and ground under the outdoor unit draining clear
  Base pan drain holes open, no ice, pooling or standing water under the unit, and defrost meltwater or condensate not running onto a walkway, stair or doorway.
  1 photo required

- [ ] Each head tested in heat and cool
  Every head run in both modes from its own controller, supply air noticeably warm then cold, no error codes on the display.
  No photo required

Close-out

- [ ] Heads set back to the occupant's mode and setpoint
  Front panel latched and each head returned to the mode, setpoint, fan speed and schedule it had before the test, remote left in its holder.
  No photo required

- [ ] Findings logged by head and room for the annual
  Filter condition, coil face, drain and any error code entered against each head and its room, so the annual knows which heads need the deepest cleaning.
  No photo required