

Packaged terminal air conditioner (PTAC) annual maintenance checklist

The annual PTAC 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 manufacturer's published instructions. Confirm the edition your authority having jurisdiction has adopted.

Who runs it: The HVAC service tech on the annual, with the room out of service long enough to slide the chassis from the sleeve.
When: Once a year in a shoulder season, deep enough to reach the fouling on the blower wheel and the back of the coils that the front-grille filter change never touches.

Chassis and deep cleaning

- ☐ **Chassis pulled and both coils deep-cleaned**
Chassis slid from the sleeve, indoor and outdoor coils cleaned through the full fin depth, dirt packed between the sections removed, bent fins combed and drainage confirmed after rinse. 2 photos required
- ☐ **Blower wheel, pan and slinger cleaned**
Blower wheel cleaned of film to restore airflow, base pan scrubbed to bare surface, slinger ring cleaned and free to throw condensate, drain path proven clear. 2 photos required

Sleeve and seal

- ☐ **Wall sleeve and gasket inspected and re-sealed**
Sleeve checked for corrosion and pitch to the exterior, gasket and any weather seal renewed at the chassis-to-sleeve joint, exterior grille secure with no gaps for wind-driven rain. 2 photos required

Electrical, controls and operation

- ☐ **Electrical connections and compressor draw checked**
Terminal and disconnect connections tight with no heat discoloration, compressor and fan amp draw read against the data plate, capacitor sound where fitted. 1 photo required
- ☐ **Full heat and cool operation and controls verified**
Unit run through heat and cool with the chassis reseated, discharge temperatures reasonable, thermostat or panel calibrated, setback and setpoint limits reset as intended. 1 photo required