READY TO INSPECT — FIELD CHECKLIST

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.

Room and lockout

- [ ] Room taken out of service with the front desk or occupant told
  Room blocked from sale or the occupant told of the service window, belongings moved clear of the unit, and a drop cloth down before the chassis comes out.
  No photo required

- [ ] Power removed by unplugging or locking out the unit's supply
  Plug pulled and held by the tech, or the disconnect locked and tagged. For amp and run checks: cover on, tools clear, lock removed by its owner, then re-locked before hands go back in.
  1 photo required

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

- [ ] Fan motor, wheel set screws and mounts checked for play
  Blower wheel and condenser fan blade tight on the shaft, motor bearings turning free by hand with no end play or noise, and rubber mounts and brackets sound.
  1 photo required

- [ ] Heat section inspected at the strip heater or hot water coil
  Electric strip element intact with no sag or scorching and its limit in place, or on hydronic or steam units the coil and valve clean and free of leaks.
  1 photo required

- [ ] Refrigerant tubing checked for oil spots and rub points
  Tubing, capillary and brazed joints free of oil stains, chafing and vibration contact, with any leak or charge work passed to a certified refrigerant technician.
  1 photo 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

- [ ] Sleeve floor cleaned and its drain openings cleared
  Debris, nests and standing water removed from the sleeve floor, drain or weep openings open to the exterior, and the sleeve free of rust through.
  1 photo required

- [ ] Chassis reseated fully and fastened in the sleeve
  Chassis slid fully home against the renewed gasket, hold-down screws or brackets fastened, and the room cabinet or front panel fitted square with no gap at the wall.
  1 photo 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
- [ ] Room returned to service with the unit running at setpoint
  Lock or plug control released by the tech who applied it, unit left running at the site's setting, work area cleaned, and the room released to the front desk.
  No photo required
- [ ] Service readings recorded against the room number
  Amp draw, discharge temperatures and parts renewed logged under the room number, so next year's annual has this unit's baseline to compare against.
  No photo required