READY TO INSPECT — FIELD CHECKLIST

Packaged terminal air conditioner (PTAC) quarterly maintenance checklist

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

Who runs it: The maintenance tech working the guest rooms or unit-by-unit round, one PTAC at a time between turnovers. When: Every quarter, walked with the room list so an occupied room gets caught on the next pass instead of skipped for the year.

Room access

- [ ] Occupant or front desk told before the room is entered
  Occupant, front desk or housing office advised of the visit, occupied rooms entered only as the site's entry policy allows, and a refused room noted rather than skipped.
  No photo required

- [ ] Unit switched off at its own controls before the filter is pulled
  Unit turned off at the front panel or wall thermostat and the fan stopped before the filter comes out, with no cover opened past the filter access on this round.
  No photo required

Filter and coils

- [ ] Filter cleaned or replaced and the indoor coil face checked
  Filter pulled from the front grille, washed or swapped and reseated flat, indoor coil face behind it clean with no matting or bent fins.
  2 photos required

- [ ] Outdoor coil face clear at the exterior grille
  Rear condenser coil free of lint, cottonwood and dirt through the exterior louver, no bushes or debris packed against the outside face.
  1 photo required

- [ ] Furniture, drapes and bedding clear of the grilles
  Intake and discharge grilles free of curtains, beds, luggage and stored items, with a clear path for air into the room and nothing resting on the discharge.
  1 photo required

Condensate and base pan

- [ ] Slinger and base pan managing condensate cleanly
  Base pan draining toward the slinger with no standing water, slinger ring free to throw condensate onto the condenser coil, no water overflowing the pan lip into the room or down the wall.
  2 photos required

- [ ] Optional drain kit flowing where one is fitted
  Where the unit is piped to a drain kit rather than slinger-only, the line is clear and draining, no back-up in the pan or staining at the outlet.
  No photo required

Seal, controls and operation

- [ ] Wall sleeve seal and gasket intact
  Foam gasket around the chassis-to-sleeve joint continuous and compressed, no daylight or draft around the chassis, sleeve and exterior grille sound with no rain track marks below.
  2 photos required

- [ ] Power supply checked at the cord and receptacle or the hard wiring
  Cord unkinked with its safety plug head intact, plug seated in a matching receptacle with no scorching or extension cord, or on hard-wired units the junction cover on and conduit secure.
  1 photo required

- [ ] Unit heats and cools on a call with controls set right
  Heat and cool each commanded from the front panel or wall thermostat, discharge air responding, setpoint limit stops and any occupancy or unoccupied setback still set as intended, no error on the display.
  1 photo required

- [ ] Discharge air temperature read in cooling and in heating
  Thermometer at the discharge grille and in the room read in each mode once the unit settles, the split recorded and compared with the site's baseline for the model.
  1 photo required

- [ ] Heat pump models seen changing over to strip heat where fitted
  On heat pump units, compressor heat observed first and the switch to electric strip heat or defrost behaving as the manufacturer describes, with no fault code shown.
  No photo required

Close-out and room log

- [ ] Front grille latched and the unit left at the occupant's setting
  Filter access and front grille latched square, unit back on at the setting the occupant or site had it on, and the display showing no fault before leaving the room.
  1 photo required

- [ ] Skipped rooms and faults logged for the next pass
  Rooms not entered and units needing service logged by room number, so an occupied room is picked up on the next round and repairs go to the HVAC service tech.
  No photo required