

Rooftop unit (RTU) annual maintenance checklist

The annual rooftop 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 ASHRAE guidance, the manufacturer's maintenance schedule. Confirm the edition your authority having jurisdiction has adopted.

Who runs it: The HVAC service lead, often with a helper for coil cleaning and electrical checks. When: Once a year, ahead of the dominant season: cooling-dominant units in spring, heating checks before first frost.

Lockout and cabinet

- ☐ **Every energy source locked out before the teardown**
Disconnect locked and tagged, gas cock locked closed on gas units; charge, flame and amp checks run under the procedure's temporary release, people and tools clear, then the unit is re-locked. 1 photo required
- ☐ **Blower assembly cleaned and balance checked**
Deeper than the quarterly look: caked dirt cleaned off the wheel blades and motor, then wheel balance and shaft set screws checked. 1 photo required
- ☐ **Cabinet liner and insulation inspected**
Liner intact with no delamination, mold or wet insulation downstream of the coil, and panel seams sealed against air and water. 1 photo required

Coils and refrigeration

- ☐ **Condenser and evaporator coils cleaned from the correct side**
Before and after photos through the fins; fins straight, no matting left at the corners. 3 photos required
- ☐ **Refrigerant charge verified by measurement**
Pressures and superheat/subcool readings logged against the unit's targets, not topped off blind. 2 photos required
- ☐ **Evidence of leaks investigated, not just recharged**
Oil residue at joints traced; leak location documented if found. 1 photo required
- ☐ **Refrigerant work done and logged by a certified technician**
Gauges, recovery and any charge change handled by a certified refrigerant technician, and the pounds added or recovered written on the unit's refrigerant record. No photo required
- ☐ **Condensate pan scrubbed and drain line flushed**
Pan cleaned and treated, the full drain line flushed to its discharge and the trap refilled, which the quarterly visual check does not reach. 1 photo required

Electrical and combustion

- ☐ **Electrical connections inspected and re-torqued**
With power locked out, contactors, lugs and terminals checked for heat marks, torque verified per the manufacturer, and re-torqued only where found loose. 2 photos required
- ☐ **Heat exchanger and burners inspected (gas units)**
Flame pattern steady and correct, no cracks or rust-through visible in the exchanger. No photo required
- ☐ **Amp draws recorded against nameplate**
Compressor and fan motor draws logged; any reading outside range flagged with the number. 1 photo required

Return to service

- ☐ Panels and guards refitted, locks removed by whoever hung them
Every panel fastened with its full set of screws, guards and door gaskets seated, then each lock and tag removed by its owner and the gas cock reopened on gas units.

1 photo required
- ☐ Temperature sensors checked against a reference thermometer
Supply, return and outdoor air sensors compared with a calibrated reference on the running unit, and any offset corrected in the controller.

1 photo required

Closeout

- ☐ Unit run-tested through a full call cycle
Starts, stages and satisfies without short-cycling or unusual noise.

1 photo required
- ☐ Findings and readings entered against the unit's record
All readings attached to the asset, so next year's tech sees the trend, not a blank page.

1 photo required