READY TO INSPECT — FIELD CHECKLIST

Unit heater annual maintenance checklist

The annual unit heater 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 IMC, manufacturer's published instructions. Confirm the edition your authority having jurisdiction has adopted.

Who runs it: The HVAC service tech, with a gas fitter's combustion check on gas-fired units. When: Once a year ahead of the heating season, so the burner, flue and safeties are proven before the units run unattended all winter.

Isolation before service

- [ ] Unit locked out and tagged at every energy source
  Disconnect locked and the gas cock or coil valves closed and tagged; firing and safety tests run under the procedure's temporary release (panels on, clear, locks off by their owner), then re-locked.
  1 photo required
- [ ] Heat source cooled and pressure relieved before opening
  Heat exchanger or elements left to cool, and on hydronic or steam units the isolated coil bled down so no hot water or steam escapes when it is opened.
  No photo required

Heat source

- [ ] Gas burner, heat exchanger and combustion inspected
  Heat exchanger checked for cracks and corrosion, burner ports clean, combustion and gas pressure verified against the rating plate on gas units.
  No photo required
- [ ] Hydronic coil and connections serviced where fitted
  Coil clear of air and debris, no weeping at unions or the control valve, heat output confirmed after purging on hydronic units.
  No photo required
- [ ] Heating surface cleaned of dust, soot and scale
  Going past the quarterly look: flue passages brushed on gas units, element sheaths wiped on electric units, coil fins blown or washed clean on hydronic or steam units.
  1 photo required
- [ ] Steam trap and condensate return tested on steam units
  Trap cycles and passes condensate without blowing live steam, strainer cleaned, return line not waterlogging the coil or hammering on start.
  No photo required

Venting on gas units

- [ ] Flue and draft hood inspected end to end
  Vent connector pitched up, joints sound and corrosion-free, draft hood clear, spillage checked at the hood with the unit firing.
  No photo required
- [ ] Vent terminal and roof or wall penetration inspected
  Cap on and clear of nests and debris, flashing or wall seal intact, terminal clearances to air intakes as the vent manufacturer's instructions set.
  No photo required

Mechanical and controls

- [ ] Fan motor and bearings serviced
  Motor bearings checked for play and noise, lubricated per the schedule, fan blade clean and balanced, mounting hardware retightened.
  1 photo required

- [ ] **Safety limits and controls tested** — 2 photos required
  High-limit, fan control and any flame-safety or lockout function exercised, unit shuts down correctly on a simulated fault.
- [ ] **Fan blade hub and guard fasteners tightened** — 1 photo required
  Blade set screw snug on the shaft flat, guard fastened at every point with no gap a hand fits through, blade tips clear of the guard when turned by hand.
- [ ] **Thermostat checked against a reference thermometer** — 1 photo required
  Stat reading compared with a reference thermometer beside it, calibration, setpoint and differential adjusted to the manufacturer's instructions.

Return to service

- [ ] **Panels and guards on, locks removed by whoever hung them** — 1 photo required
  Access panels and fan guard refastened, tools out of the cabinet, each lock and tag removed by the person who applied it under the site's procedure.
- [ ] **Unit restarted and run through a full heating cycle** — 1 photo required
  Heat source reopened, unit called on by the stat, heats, satisfies and shuts off cleanly, with the fan running on until the residual heat is purged.
- [ ] **Fan motor amps read with the unit called on again** — 1 photo required
  Fan motor amps read at its leads under the energized-work procedure and PPE with the unit called on again, against the motor nameplate and last season's value to catch a dragging bearing.