READY TO INSPECT — FIELD CHECKLIST

Unit heater quarterly maintenance checklist

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

Who runs it: The HVAC or facilities tech on the quarterly round through the warehouse and mechanical spaces. When: Every quarter, with a pass just before the heating season so a dead unit heater is found before the space it serves freezes.

Heat and air delivery

- [ ] Heat proven by calling the unit on
  Thermostat driven up, gas unit lights or hydronic valve opens, warm air felt at the discharge louvers within the normal delay.
  2 photos required
- [ ] Discharge louvers aimed and unobstructed
  Louvers set to throw the air where it's needed, nothing hung or stacked in front of the discharge.
  1 photo required
- [ ] Discharge air temperature read at the louvers
  Thermometer reading at the discharge once the unit is running steady, compared with last season's reading and the rise on the nameplate.
  1 photo required

Heat source and casing

- [ ] Heat source supply checked for leaks and damage
  Gas connection leak-checked at the unions and valve, electric supply whip and box secured, or hydronic or steam piping dry at the unions, valves and coil.
  1 photo required
- [ ] Shutoff or disconnect at the unit reachable and labeled
  Gas cock, electrical disconnect or isolation valves close to the unit, reachable from a ladder or lift, labeled for the unit they serve and not blocked by stock.
  1 photo required
- [ ] Vent connector and terminal viewed from the floor on gas units
  Connector joints intact and pitched up toward the vent, no soot streaks or rust at the draft hood, terminal cap in place where it can be seen.
  No photo required
- [ ] Heating surface viewed through the louvers
  Heat exchanger, element sheaths or coil fins seen through the louvers free of soot, rust scale and matted dust that chokes the airflow.
  1 photo required
- [ ] Casing checked for rust, dust and condensate staining
  Cabinet sound with no rust-through, access panels fastened, no water or condensate stains on the casing or the floor below.
  1 photo required

Fan and mounting

- [ ] Fan and motor run checked
  Propeller or blower turns freely and quietly, motor not overheating, guard in place and clear of debris.
  1 photo required
- [ ] Hangers, rods and brackets checked for movement
  Suspension hardware tight, no swaying or vibration walking the unit, isolators intact where fitted.
  2 photos required
- [ ] Mounting height checked against stored goods and traffic below
  Unit still hung at its installed height above stored goods and whatever moves beneath it, no strike marks on the casing or guard, bottom of the casing clear of the highest stack.
  1 photo required

Clearances and controls

- [ ] Clearance to storage and combustibles maintained
  Required clearances kept below and around the unit, no pallets, boxes or racking encroaching on the heater or its vent.
  2 photos required

- [ ] Thermostat response verified
  Unit starts and stops on the thermostat call, setpoint matches what the space needs, no unit left running against a dead stat.
  1 photo required

- [ ] Thermostat placement and guard checked
  Stat still on its wall or column out of the discharge stream and away from doors, not boxed in by stock, guard or locking cover intact.
  1 photo required

- [ ] Round findings logged against the unit's tag
  Readings, faults and any repair needed entered in the maintenance log under the unit's tag, with follow-up work raised before the heating season.
  No photo required