

Water-source heat pump quarterly maintenance checklist

A quarterly water-source heat pump 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 mechanical or maintenance tech on the quarterly round, reaching each unit through the ceiling access panel or the closet door. When: Every quarter, walked unit by unit so a loaded filter or a weeping hose kit is caught before it shows up as a hot or cold zone complaint.

Air side

- ☐ **Filter replaced and coil face inspected**
Filter changed and correctly sized, no bypass around the rack, coil face clean behind it with no matting or bent fins visible. 2 photos required
- ☐ **Condensate pan clear and float switch proven**
Pan draining fully with no standing water or growth, trap primed, float switch lifted to confirm it interrupts the unit or alarms, secondary pan dry over occupied space. 2 photos required
- ☐ **Blower running clean and quiet**
Wheel free of build-up, set screw tight, motor mounts sound, no rattle or bearing noise at each speed tap. 1 photo required

Water side

- ☐ **Hose kit, isolation valves and connections dry**
Supply and return hose kits, isolation ball valves and unions free of weeping or drips, no rust trail or wet insulation at the coax connections. 2 photos required
- ☐ **Loop flow and pressure drop reasonable across the unit**
Supply and return pressures or the pressure drop across the coax read against the balanced value, no sign of a fouling strainer or a throttled autoflow starving the exchanger. 1 photo required

Operation and controls

- ☐ **Unit heats and cools on a call**
Heat and cool each commanded from the thermostat, reversing valve shifting so discharge air changes over, entering and leaving water temperatures moving as expected, no fault on the board. 1 photo required