

AC Maintenance Checklist (cooling visit)

One sheet per system. Fill the header from the nameplate at the first visit so the next tech arrives with the right filter and the right refrigerant on the truck.

Customer	[Name] · [Phone] · [Email]
Service address	[Street, City, State ZIP] · Gate / access: []
Plan and visit	Plan tier: [Bronze / Silver / Gold / none] · Plan year: [Start] to [End] · This is visit ☐ 1 ☐ 2 of the plan year
Date and technician	Date: [] · Tech: [] · Arrived: [] · Left: []
System	☐ Split AC ☐ Packaged unit ☐ Ductless mini split ☐ Heat pump (use the heat pump checklist for the heating side)
Outdoor unit	Make: [] · Model: [] · Serial: [] · Tons: [] · Year: []
Indoor unit	Make: [] · Model: [] · Serial: [] · Location: ☐ attic ☐ closet ☐ garage ☐ basement ☐ crawlspace
Refrigerant and metering	Refrigerant: ☐ R-410A ☐ R-22 ☐ R-454B ☐ R-32 ☐ other [] · Nameplate charge: [] lb [] oz · Metering device: ☐ fixed orifice / piston ☐ TXV ☐ EEV · Design subcooling (nameplate): [] °F
Filter(s)	Size(s): [] · Type: ☐ 1-inch ☐ 4-inch media ☐ washable · Location: [] · Last changed: []
Thermostat	Make / model: [] · ☐ Wi-Fi ☐ programmable ☐ manual · Battery: []

1. Conditions at the visit

Take these first, with the system running at least 15 minutes in cooling. The refrigerant and airflow targets below depend on them.

Outdoor dry bulb	Return dry bulb	Return wet bulb	Indoor RH	Supply dry bulb	Temperature split (return minus supply)
[] °F	[] °F	[] °F	[] %	[] °F	[] °F target 16 to 22 °F, manufacturer's chart governs

2. Thermostat and controls

✓	Task	What to check and target	Result / reading
☐	Thermostat calls for cooling, satisfies, and displays the same temperature as a reference thermometer	Within 2 °F of reference. Replace battery, check level and location (not over a supply, not in sun)	Set: [] Room: []
☐	Low-voltage wiring and control board	Terminals tight, no chafed insulation, board free of scorch marks	☐ OK ☐ Repair
☐	Float switch and any other safety in the low-voltage circuit	Lift the float; the outdoor unit must stop. Reset	☐ Passed ☐ Failed ☐ None installed

3. Filter and return

✓	Task	What to check and target	Result / reading
☐	Replace or clean filter; write the size on the header	Correct size, correct airflow arrow,	☐ Replaced ☐ Cleaned

✓	Task	What to check and target	Result / reading
		no bypass gaps around the frame	☐ Customer supplies
☐	Return grille, filter rack and return duct	Grille open and unblocked; rack seals; no collapsed or disconnected return	☐ OK ☐ Repair

4. Indoor unit (air handler or furnace coil)

✓	Task	What to check and target	Result / reading
☐	Power off at the disconnect or breaker and verify with a meter before opening the cabinet	Zero volts at the unit	☐ Verified
☐	Cabinet, panels, fasteners, insulation	Panels seal, no air leaks at seams, insulation intact	☐ OK ☐ Repair
☐	Evaporator coil: open the access panel and look	Fins clean, straight and open; no oil stains at joints; no ice; coil surface visible on both faces where accessible	☐ Clean ☐ Cleaned today ☐ Needs cleaning (quote)
☐	Blower wheel and housing	No buildup on the blades (buildup cuts airflow); wheel tight on the shaft, no wobble	☐ Clean ☐ Cleaned today ☐ Quote
☐	Blower motor amps against nameplate FLA	At or below FLA. Above FLA means restriction, wrong speed tap or a failing motor	Amps: [] / FLA: []
☐	Blower run capacitor (PSC motors only)	Measured μ F within $\pm 6\%$ of the rated value; no bulge or leak	Rated: [] Measured: []
☐	Condensate drain: clear the line, flush, check the trap and slope	Water flows freely at the termination; trap holds water; no standing water in the pan; pan not rusted through	☐ Flushed ☐ Cleared clog ☐ Repair
☐	Secondary drain pan and overflow protection (attic and above-ceiling units)	Pan dry and not corroded; secondary line or float switch present and tested (Section 2)	☐ OK ☐ Water found ☐ None present
☐	Static pressure: return and supply, with a clean filter in place	Total external static at or below the nameplate rating, usually 0.5 in. w.c. or less. 0.8 or above is a problem to investigate	Return: [] Supply: [] TESP: [] Rated: []
☐	Line voltage at the unit	Within the nameplate range	[] V

5. Outdoor unit (condenser)

✓	Task	What to check and target	Result / reading
☐	Disconnect box, fuses, wiring and ground	Right fuse size, not bypassed; case intact; connections tight; no heat-discolored wire; ground bonded	☐ OK ☐ Repair
☐	Line voltage	Within the nameplate range; record it	[] V
☐	Contactor	Light pitting and black oxide are normal; replace for heavy pitting, melting, a burned coil or a stuck armature	☐ OK ☐ Replaced ☐ Quote

✓	Task	What to check and target	Result / reading
☐	Run capacitor, each section	Measured μ F within $\pm 6\%$ of rated; no bulge, no oil. Power off and discharge before testing	Herm rated [] meas [] · Fan rated [] meas []
☐	Condenser fan motor and blade	Amps at or below FLA; blade tight on the shaft, no wobble, minimal end play; bearings quiet	Amps: [] / FLA: []
☐	Compressor amps	At or below nameplate RLA; note any hard start kit	Amps: [] / RLA: []
☐	Condenser coil cleaned from the inside out	Power off and verified. Pull the top where the coil needs it, protect the electrical, low pressure water, coil cleaner only where the manufacturer allows it, rinse until water runs clear	☐ Water only ☐ Cleaner used ☐ Top pulled
☐	Coil fins and cabinet	Fins straight and open; no crushed sections; panels tight; base drains	☐ OK ☐ Straightened
☐	Clearance and level	Nothing within the manufacturer's clearance; pad level; unit not sunk	☐ OK ☐ Note
☐	Line set insulation and service valve caps	Suction line insulation intact end to end; caps on with cores tight; no oil at the valves or joints	☐ OK ☐ Repair

6. Refrigerant circuit

Gauges go on only with a reason: the temperature split is off with airflow verified, there is oil at a joint, or the customer reports a cooling problem. Every connection loses a little refrigerant. Record everything you read.

✓	Task	What to check and target	Result / reading
☐	Suction side	Pressure, saturation temperature, suction line temperature at the outdoor unit	[] psig · [] °F sat · [] °F line
☐	Liquid side	Pressure, saturation temperature, liquid line temperature	[] psig · [] °F sat · [] °F line
☐	Superheat (fixed orifice systems: this is the charging method)	Compare to the target superheat chart for the return wet bulb and outdoor dry bulb in Section 1. Targets run from under 5 °F to about 40 °F with conditions, so there is no single number	Measured: [] °F · Target: [] °F
☐	Subcooling (TXV and EEV systems: this is the charging method)	Match the nameplate design subcooling. 10 to 12 °F is common; some systems call for up to 16 °F	Measured: [] °F · Target: [] °F
☐	If the charge is low: leak check before adding refrigerant	Electronic detector at joints, valves, coil headers; oil stains. Give the customer the options in writing: find and repair, or top off as a stopgap with today's readings as the baseline	☐ No leak found ☐ Leak at: [] ☐ Customer chose: []
☐	Refrigerant added or recovered	Type and amount; certified tech only; no venting	Added: [] lb [] oz · Recovered: []

✓	Task	What to check and target	Result / reading
☐	A2L systems (R-454B, R-32)	Refrigerant detection sensor present and tested per the manufacturer; mitigation (blower) runs on alarm	☐ Tested ☐ N/A

7. Ductless mini split and packaged unit additions (where they apply)

✓	Task	What to check and target	Result / reading
☐	Mini split: washable filters, blower wheel and coil on each head	Filters washed and dried; no black buildup on the wheel blades, no odor on startup. Clean with a bib kit or pull the wheel per the manufacturer	Heads: [] ☐ Clean ☐ Cleaned ☐ Quote
☐	Mini split: drain pan, drain line and condensate pump on each head	Pour water into the pan; it must leave at the termination. Pump runs and shuts off	☐ OK ☐ Repair
☐	Mini split or inverter outdoor unit	Section 5 applies. Charge only by the manufacturer's procedure; the superheat and subcooling targets above do not apply to inverter units	☐ Done
☐	Packaged unit: curb, cabinet seams, duct collars	No air or water leaks at the curb or collars; panels sealed	☐ OK ☐ Repair
☐	Packaged unit: belt, pulleys, bearings where belt driven; drain and trap outside the cabinet	Belt tension and wear, pulley alignment; drain trapped, sloped, clear, terminating away from the unit	☐ OK ☐ Belt replaced ☐ Repair

8. Findings, recommendations and sign-off

Findings	[What was found, with photos on the invoice]
Repairs recommended	[Item · price after member discount · urgency: now / this season / watch]
Parts replaced today	[Capacitor, contactor, filter, drain switch, other]
Refrigerant	Type: [] · Added: [] · Recovered: [] · Reason recorded above: ☐
Photos taken	☐ Nameplates ☐ Coil before/after ☐ Readings ☐ Drain ☐ Recommended repairs
Next visit	Heating visit due: [Month] · Filter change reminder: []

Technician signature: _____ Date: _____

Customer acknowledgement (visit completed, findings explained): _____

Date: _____

Target ranges on this sheet are field rules of thumb from ACCA Standard 4, HVAC School and manufacturer literature. Where the nameplate or the manufacturer's service data gives a different number, that number wins. Refrigerant work is restricted to EPA Section 608 certified technicians; venting is prohibited.