HOSPITALITY HVAC INSPECTION TEMPLATE

HVAC Inspection Checklist

Inspect filters, coils, condensate, fans, motors, controls, refrigerant systems, central plant, guest-room units, ventilation, defects, restrictions, corrective work, verification, and return to service.

PROPERTY / AREA	DATE / SHIFT	HVAC ASSET / ID	TECHNICIAN / REVIEWER

1. Inspection setup, asset identity, service history, scope, and operating context

1 Confirm the property, date and shift, HVAC asset ID, location, equipment type, served area, technician, supervisor, and final reviewer. — HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Start with asset identity and service history.

2 Verify the equipment nameplate, manufacturer or model where available, refrigerant type where applicable, design duty, control interface, and maintenance responsibility match the asset record. — CRITICAL — HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Recent alarms and complaints help focus the inspection.

3 Review recent work orders, alarms, guest complaints, comfort calls, water leaks, abnormal noise, repeat failures, refrigerant-service history, and prior corrective actions before inspection. — HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Use the correct procedure for the equipment type.

4 Confirm the inspection scope is appropriate for the asset, including filters, coils, condensate, fans, motors, belts, controls, sensors, valves, pumps, refrigerant circuit, and connected equipment as applicable. — CRITICAL — HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Record operating context before judging performance.

5 Check the required manufacturer instructions, approved PM procedure, service contract, specialist requirements, local code obligations, and property engineering standards are available for the work. — HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Keep manufacturer guidance accessible.

6 Record current operating mode, occupied or unoccupied status, unusual weather or load conditions, temporary controls, restrictions, and any condition that could affect the inspection result. — HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Document missing asset information.

2. Plant room, equipment access, housekeeping, isolation points, and maintenance safety

7 **Check plant rooms, service corridors, roof areas, equipment platforms, access panels, and maintenance approaches are clear, adequately lit, and suitable for safe inspection.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Safe access is part of HVAC readiness.

8 **Verify floors and walking-working surfaces around HVAC equipment are orderly and free from uncontrolled water, oil, loose parts, cords, debris, or other slip or trip hazards.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Keep plant-room floors dry and orderly where feasible.

9 **Confirm electrical disconnects, breakers, isolators, valves, stored-energy points, and other energy-control locations are identifiable for the maintenance task.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Know the isolation points before servicing begins.

10 **Use the property's authorized energy-control procedure when inspection or servicing exposes workers to unexpected startup, fan rotation, electrical energy, pressure, steam, water, or other hazardous stored energy.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: LOTO applies when unexpected startup or stored energy could injure workers.

11 **Check guards, access covers, panels, doors, interlocks, and protective enclosures are present and secure before normal operation is restored.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Replace all guards before return to service.

12 **Stop or escalate the inspection if safe access, isolation, competent personnel, required PPE, permit, ladder, platform, or specialist support is not available.**

HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Do not improvise access or isolation.

3. Filters, intake air, return air, coils, fins, and air-path cleanliness

13 **Inspect filters for loading, collapse, moisture, damage, bypass, incorrect fit, unusual odor, and replacement condition according to the approved maintenance plan.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Filter condition is a useful operating signal.

14 **Confirm filters are the correct type and orientation for the equipment and that filter racks, seals, access doors, and retaining hardware are secure.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: A poor filter fit can bypass the media.

15 **Inspect accessible outdoor-air intakes, return-air paths, screens, louvers, and nearby surfaces for debris, blockage, visible contamination, or conditions that restrict normal airflow.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Check both outdoor and return-air paths.

16 **Check accessible heating and cooling coils for dirt buildup, fin damage, corrosion, icing, oil staining, debris, or other conditions that could reduce heat transfer or indicate a defect.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Dirty coils reduce heat-transfer performance.

17 **Verify coil fins, guards, panels, and nearby insulation are intact enough for safe normal operation and report damaged areas requiring repair or specialist cleaning.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Protect fins and insulation from damage.

18 **Record recurring early filter loading, coil fouling, visible debris, smoke or odor complaints, or other air-path trends that may require revised maintenance frequency or root-cause review.**

HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Trend repeated early fouling.

4. Condensate pans, drain lines, traps, moisture, leakage, corrosion, and microbial-risk indicators

19 **Inspect condensate pans for standing water, sludge, debris, corrosion, damage, overflow staining, and evidence that drainage is not working as intended.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Standing water in condensate pans deserves attention.

20 **Check accessible condensate drains, traps, pumps, hoses, and drain connections for blockage, leakage, poor fall, disconnection, or repeated overflow history.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Drain problems often become guest-room leaks.

21 **Confirm wet insulation, ceiling staining, rust, corrosion, water marks, or other moisture evidence around the HVAC asset is investigated rather than treated as a cosmetic issue only.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Treat moisture evidence as a root-cause clue.

22 **Verify drain pans and condensate areas are cleaned and maintained according to the approved HVAC maintenance procedure and manufacturer guidance.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Follow approved cleaning procedures.

23 **Escalate active condensate leakage, overflow affecting electrical systems, repeated ceiling leaks, severe corrosion, or moisture conditions that could damage guest areas or equipment.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Water near electrical equipment needs immediate control.

24 **Record recurring condensate failures by asset, room, floor, season, and root cause so the maintenance plan can be adjusted before repeat guest impact occurs.**

HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Trend recurring condensate events by season.

5. Fans, motors, belts, bearings, pulleys, vibration, noise, and mechanical condition

25 **Inspect fan wheels, blades, housings, guards, shafts, pulleys, belts, couplings, and accessible mechanical components for wear, looseness, damage, debris, or misalignment.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Inspect mechanical parts before failure becomes obvious.

26 **Check belt condition and tension according to manufacturer guidance and report cracking, glazing, fraying, slipping, incorrect alignment, or repeated early failure.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Use manufacturer guidance for belt adjustment.

27 **Listen for abnormal bearing, motor, fan, or airflow noise and check for unusual vibration, rubbing, imbalance, or movement that differs from normal operation.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Vibration changes are valuable early-warning signs.

28 **Inspect motors and accessible electrical enclosures for overheating signs, unusual odor, discoloration, loose exterior hardware, moisture intrusion, or damaged conduit or cable protection.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Overheating may indicate an electrical or mechanical problem.

29 **Verify lubrication or bearing-service tasks are completed only where specified by the manufacturer or approved maintenance procedure and are recorded correctly.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Do not over-lubricate sealed components.

30 **Remove or restrict equipment with severe vibration, damaged guards, failing bearings, unsafe rotating components, overheating, or other mechanical conditions that could worsen rapidly or create injury risk.**

HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Restrict severely damaged rotating equipment.

6. Controls, thermostats, sensors, dampers, actuators, BMS points, alarms, and sequence of operation

31 **Check thermostats, temperature sensors, humidity sensors, pressure sensors, switches, relays, actuators, dampers, valves, and other accessible controls for secure mounting and obvious damage.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Controls should agree with actual equipment response.

32 **Compare displayed values, room conditions, equipment response, and BMS or control-system points for obvious inconsistency that could indicate a sensor, communication, or control problem.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Sensor drift can look like an equipment problem.

33 **Verify occupied and unoccupied schedules, setpoints, mode commands, fan commands, valve or damper responses, and other operational settings match the approved control strategy.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Review schedules and setpoints before changing them.

34 **Review active and historical alarms for repeated trips, sensor faults, communication loss, freeze protection, high temperature, low airflow, condensate alarms, or other recurring conditions.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Repeated alarms should not be normalized.

35 **Confirm manual overrides, disabled alarms, bypassed safeties, temporary setpoints, and maintenance modes are documented, time-limited, and removed when no longer required.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Temporary overrides need owners and expiry.

36 **Escalate failed safeties, persistent control instability, unexplained overrides, critical alarm suppression, or control faults that could affect comfort, ventilation, equipment protection, or safe operation.**

HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Failed safeties require escalation.

7. Refrigerant circuit, compressors, piping, leak indicators, service records, and compliance controls

37 **Inspect accessible refrigerant piping, service valves, joints, fittings, insulation, oil-stained areas, and equipment surfaces for visible signs that warrant qualified leak evaluation.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Oil staining can be a useful leak indicator.

38 **Check compressors, crankcase heaters where applicable, mounts, accessible wiring enclosures, vibration isolators, and surrounding areas for abnormal noise, heat, vibration, leakage, or physical damage.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Refrigerant-circuit work may require certified personnel.

39 **Verify refrigerant service, recovery, charging, leak inspection, and repair work is performed only by appropriately qualified or certified personnel where required by applicable law.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Use approved recovery practices.

40 **Do not intentionally vent refrigerant during maintenance or service; use approved recovery and service practices and follow current applicable refrigerant-management requirements.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: EPA prohibits intentional venting of regulated refrigerants and substitutes except limited permitted releases.

41 **Review refrigerant additions, leak repairs, verification records, and recurring leak history for equipment subject to recordkeeping or leak-repair requirements in the applicable jurisdiction.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Track leak-repair records where applicable.

42 **Escalate suspected major refrigerant loss, repeated charging without resolved cause, compressor distress, refrigerant exposure concern, or service activity outside the authorized scope.**

HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Repeated charging without root-cause repair is a warning sign.

8. Chillers, boilers, pumps, cooling towers, hydronic loops, valves, and central-plant condition

43 **Inspect applicable chillers, boilers, pumps, expansion equipment, heat exchangers, cooling towers, strainers, valves, and hydronic components within the authorized inspection scope.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Central plant needs condition and redundancy awareness.

44 **Check for leakage, corrosion, abnormal pressure or temperature indication, unusual pump noise, seal leakage, cavitation signs, vibration, failed insulation, or other abnormal plant condition.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Check pumps for leakage and abnormal noise.

45 **Verify pump and valve positions, operating status, differential indicators where used, and accessible gauges or displays are consistent with the intended operating mode.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Use operating readings to support visual findings.

46 **Inspect accessible cooling-tower basins, strainers, drift eliminator areas, fans, belts, guards, and water distribution for visible condition issues within the property's approved program.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Cooling-tower work may require specialist water-management controls.

47 **Coordinate HVAC water-system inspection with the property's water-management, treatment, specialist-service, and local requirements rather than relying on a general visual check alone.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: General inspection does not replace required water treatment or testing.

48 **Escalate major leakage, abnormal pressure, failed pump redundancy, overheating, unsafe access, structural concern, or other central-plant defect that threatens service continuity or equipment protection.**

HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Major central-plant defects need rapid escalation.

9. Guest-room units, terminal equipment, diffusers, exhaust, ventilation, comfort, and occupied-space condition

49 **Inspect guest-room fan-coil units, PTACs, split systems, grilles, diffusers, return-air openings, thermostats, and accessible filters for cleanliness, damage, noise, leakage, and normal response.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Guest complaints should be tied to exact rooms and assets.

50 **Check room airflow and temperature response are consistent enough for guest use and investigate repeated hot, cold, humid, noisy, or low-airflow complaints by exact room and asset.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Check airflow before assuming thermostat failure.

51 **Inspect bathroom and other guest-area exhaust grilles or fans within scope for visible blockage, dirt buildup, unusual noise, failed operation, or airflow complaints.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Exhaust problems can affect odor and humidity.

52 **Verify diffusers, grilles, return openings, and terminal units are not unintentionally blocked by furniture, curtains, stored materials, or recent room changes.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Furniture can unintentionally block airflow.

53 **Record room-level condensate leaks, ceiling stains, odor, vibration, control faults, repeated resets, or guest-impact defects and assign corrective ownership.**

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Record room-level defects consistently.

54 **Keep a guest room or area restricted when HVAC failure creates an unacceptable condition and normal occupancy cannot be supported until repair and verification are complete.**

HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Restrict rooms when HVAC failure makes occupancy unacceptable.

10. Corrective actions, work orders, verification, trend review, PM updates, and return to service

55 Record every HVAC finding with asset ID, exact location, condition, severity, guest impact, operational status, owner, target date, and supporting evidence.

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Every finding needs one visible owner.

56 Create corrective work orders for leaks, blocked drains, dirty coils, failed filters, worn belts, vibration, control faults, refrigerant issues, motor problems, or other defects outside the inspection task.

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Use the right verification evidence for the defect.

57 Use functional verification, readings, photos, alarm clearance, control response, leak-repair verification where required, or specialist documentation before closing critical HVAC defects.

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Do not close critical defects on paperwork alone.

58 Confirm equipment panels, guards, access doors, valves, controls, temporary overrides, tools, and work areas are restored to the correct condition before normal operation resumes.

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Restore guards, panels, and overrides before startup.

59 Trend repeat HVAC failures, guest comfort complaints, filter loading, condensate events, refrigerant additions, compressor issues, alarms, energy anomalies, and overdue PM by asset and property.

CRITICAL | HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Trend repeat failures to improve PM.

60 Record the final inspection result, restricted assets or rooms, open corrective actions, next inspection or PM date, technician, supervisor, reviewer, date, time, and sign-off.

HVAC

Operational | Needs service | Out of service | N/A

Execution tip: Final sign-off should show every remaining restriction.