

FREE FACILITIES & PROPERTY HVAC PREVENTIVE MAINTENANCE TEMPLATE

HVAC Preventive Maintenance Checklist

Use this 60-point checklist to maintain HVAC assets across air handlers, filters, coils, fans, belts, drains, cooling and heating equipment, controls, ventilation, electrical condition, operating readings, corrective work, seasonal readiness, and final sign-off.

Property / building

PM date

HVAC asset / zone

Technician / supervisor

Internal Facilities & Property template. Apply manufacturer instructions, approved HVAC maintenance procedures, safe-isolation rules, qualified refrigerant or combustion-service requirements, electrical-safety requirements, service contracts, building operating standards, and local regulations.

1. PM scope, HVAC asset register, criticality, service history, frequencies, and responsibilities

- 1
- Confirm the property, building, floor or zone, maintenance date, season or operating period, and HVAC preventive-maintenance scope are clearly identified.
- CRITICAL
- HVAC PM

HVAC PM Item	Condition / result	Owner	Evidence	Action
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Execution tip: Start from the HVAC asset register and current PM schedule. Record the asset ID, location, equipment type, maintenance frequency, operating duty, and any previous...

- 2
- Identify each HVAC asset in scope by asset ID, location, equipment type, make or model where used, service duty, and criticality.
- CRITICAL
- HVAC PM

HVAC PM Item	Condition / result	Owner	Evidence	Action
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Execution tip: Start from the HVAC asset register and current PM schedule. Record the asset ID, location, equipment type, maintenance frequency, operating duty, and any previous...

- 3
- Verify the current PM schedule defines required tasks, maintenance frequency, responsible technician or contractor, and expected completion date for each sampled asset.
- CRITICAL
- HVAC PM

HVAC PM Item	Condition / result	Owner	Evidence	Action
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Execution tip: Start from the HVAC asset register and current PM schedule. Record the asset ID, location, equipment type, maintenance frequency, operating duty, and any previous...

- 4
- Review previous breakdowns, comfort complaints, high-energy-use observations, alarms, water leaks, condensate issues, repeat repairs, and open HVAC work orders before maintenance.
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- HVAC PM

HVAC PM Item	Condition / result	Owner	Evidence	Action
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Execution tip: Start from the HVAC asset register and current PM schedule. Record the asset ID, location, equipment type, maintenance frequency, operating duty, and any previous...

- 5
- Confirm current manufacturer instructions, approved maintenance procedures, safe-work requirements, specialist-service needs, and warranty conditions are available where applicable.
- CRITICAL
- HVAC PM

HVAC PM Item	Condition / result	Owner	Evidence	Action
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Execution tip: Start from the HVAC asset register and current PM schedule. Record the asset ID, location, equipment type, maintenance frequency, operating duty, and any previous...

- 6
- Record property, asset group, maintenance date, technician, HVAC supervisor, facilities owner, contractor where applicable, and next planned PM date.
-
- HVAC PM

FINAL STATUS | Enter

HVAC SUPERVISOR | Enter

FACILITIES APPROVAL | Enter

Execution tip: Start from the HVAC asset register and current PM schedule. Record the asset ID, location, equipment type, maintenance frequency, operating duty, and any previous...

2. Air-handling units, fan-coil units, cabinets, panels, access, housekeeping, and visible condition

7 Inspect air-handling units, fan-coil units, rooftop units, package units, split-system indoor units, or other air-side equipment included in the PM scope. **CRITICAL** HVAC PM

Complete

Follow-up

Critical

LIVE PHOTO | Add

Execution tip: A clean and accessible HVAC unit is easier to maintain and inspect. Leave access panels, guards, doors, and service areas correctly restored after maintenance.

8 Check equipment cabinets, access doors, panels, fasteners, hinges, latches, insulation, gaskets, and visible casing for damage, corrosion, looseness, or air leakage clues. **CRITICAL** HVAC PM

Complete

Follow-up

Critical

LIVE PHOTO | Add

Execution tip: A clean and accessible HVAC unit is easier to maintain and inspect. Leave access panels, guards, doors, and service areas correctly restored after maintenance.

9 Confirm service access around the HVAC unit is clear of storage, waste, contractor materials, blocked doors, or other obstructions. **CRITICAL** HVAC PM

Complete

Follow-up

Critical

LIVE PHOTO | Add

Execution tip: A clean and accessible HVAC unit is easier to maintain and inspect. Leave access panels, guards, doors, and service areas correctly restored after maintenance.

10 Inspect internal and external accessible surfaces for dust, debris, standing water, oil residue, biological growth clues, damaged insulation, or poor housekeeping. **CRITICAL** HVAC PM

Complete

Follow-up

Critical

LIVE PHOTO | Add

Execution tip: A clean and accessible HVAC unit is easier to maintain and inspect. Leave access panels, guards, doors, and service areas correctly restored after maintenance.

11 Verify access panels, filters, guards, covers, and service doors removed for maintenance are correctly reinstalled and secured before return to service. **CRITICAL** HVAC PM

HVAC PM item	Condition / result	Owner	Evidence	Action
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Execution tip: A clean and accessible HVAC unit is easier to maintain and inspect. Leave access panels, guards, doors, and service areas correctly restored after maintenance.

12 Escalate severe corrosion, damaged casings, unsafe access, missing panels, persistent water accumulation, or other conditions requiring corrective repair. **CRITICAL** HVAC PM

HVAC PM item	Condition / result	Owner	Evidence	Action
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Execution tip: A clean and accessible HVAC unit is easier to maintain and inspect. Leave access panels, guards, doors, and service areas correctly restored after maintenance.

3. Filters, coils, heat-transfer surfaces, fins, cleaning, airflow resistance, and replacement status

13

Inspect air filters for loading, damage, collapse, bypass gaps, moisture, incorrect installation, or overdue replacement.

CRITICAL

HVAC PM

Complete

Follow-up

Critical

LIVE PHOTO | Add

Execution tip: Filter and coil condition directly affects airflow and efficiency. Use the equipment's approved filter specification and cleaning method rather than substituting unverified...

14

Confirm replacement filters match the approved type, dimensions, orientation, and performance specification for the equipment.

CRITICAL

HVAC PM

HVAC PM item	Condition / result	Owner	Evidence	Action
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Execution tip: Filter and coil condition directly affects airflow and efficiency. Use the equipment's approved filter specification and cleaning method rather than substituting unverified...

15

Check filter frames, racks, clips, seals, access doors, and surrounding surfaces so unfiltered bypass air is minimized.

CRITICAL

HVAC PM

Complete

Follow-up

Critical

LIVE PHOTO | Add

Execution tip: Filter and coil condition directly affects airflow and efficiency. Use the equipment's approved filter specification and cleaning method rather than substituting unverified...

16

Inspect accessible cooling and heating coils, fins, heat exchangers, and related surfaces for dust, debris, bent fins, corrosion, damage, or restricted airflow.

CRITICAL

HVAC PM

Complete

Follow-up

Critical

LIVE PHOTO | Add

Execution tip: Filter and coil condition directly affects airflow and efficiency. Use the equipment's approved filter specification and cleaning method rather than substituting unverified...

17

Clean coils and heat-transfer surfaces using the approved method and record any chemical cleaner, rinse, fin repair, or specialist action where applicable.

HVAC PM

HVAC PM item	Condition / result	Owner	Evidence	Action
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Execution tip: Filter and coil condition directly affects airflow and efficiency. Use the equipment's approved filter specification and cleaning method rather than substituting unverified...

18

Record filter replacement date, coil condition, differential-pressure reading where used, and any abnormal restriction requiring follow-up.

HVAC PM

HVAC PM item	Condition / result	Owner	Evidence	Action
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Execution tip: Filter and coil condition directly affects airflow and efficiency. Use the equipment's approved filter specification and cleaning method rather than substituting unverified...

4. Fans, motors, belts, pulleys, bearings, mounts, vibration, lubrication, and mechanical condition

19

Inspect supply, return, exhaust, condenser, or other HVAC fans and motors for visible damage, abnormal noise, vibration, looseness, or overheating clues.

CRITICAL

HVAC PM

Complete

Follow-up

Critical

LIVE PHOTO | Add

Execution tip: Rotating components should run smoothly with guards in place. Investigate abnormal noise, vibration, belt dust, overheating, or repeated adjustment rather than...

20

Check belts for cracking, glazing, fraying, wear, alignment, tension, contamination, and suitable condition where belt-driven equipment is used.

CRITICAL

HVAC PM

Complete

Follow-up

Critical

LIVE PHOTO | Add

Execution tip: Rotating components should run smoothly with guards in place. Investigate abnormal noise, vibration, belt dust, overheating, or repeated adjustment rather than...

21

Inspect pulleys, sheaves, couplings, shafts, bearings, fan wheels, blades, fasteners, guards, and motor mounts for damage, looseness, wear, or misalignment.

CRITICAL

HVAC PM

Complete

Follow-up

Critical

LIVE PHOTO | Add

Execution tip: Rotating components should run smoothly with guards in place. Investigate abnormal noise, vibration, belt dust, overheating, or repeated adjustment rather than...

22

Lubricate bearings, motors, linkages, or other components only where required by the approved maintenance procedure and record the lubricant or service performed.

HVAC PM

HVAC PM item	Condition / result	Owner	Evidence	Action

Execution tip: Rotating components should run smoothly with guards in place. Investigate abnormal noise, vibration, belt dust, overheating, or repeated adjustment rather than...

23

Review vibration, temperature, current, speed, noise, or other condition-monitoring readings where included in the HVAC PM plan and escalate abnormal trends.

HVAC PM

HVAC PM item	Condition / result	Owner	Evidence	Action

Execution tip: Rotating components should run smoothly with guards in place. Investigate abnormal noise, vibration, belt dust, overheating, or repeated adjustment rather than...

24

Confirm all belt, coupling, fan, and rotating-part guards are secure before the unit is returned to operation.

CRITICAL

HVAC PM

HVAC PM item	Condition / result	Owner	Evidence	Action

Execution tip: Rotating components should run smoothly with guards in place. Investigate abnormal noise, vibration, belt dust, overheating, or repeated adjustment rather than...

5. Condensate pans, drains, traps, pumps, moisture, insulation, leakage, and water management

25

Inspect drain pans, condensate trays, drain lines, traps, pumps, hoses, fittings, and discharge points for blockage, dirt, leakage, corrosion, or standing water.

CRITICAL

HVAC PM

Complete

Follow-up

Critical

LIVE PHOTO | Add

Execution tip: Recurring condensate problems can cause water damage, odors, microbial growth, and service interruption. Verify both drainage and the underlying cause of repeated...

26

Clean or flush condensate drains and traps according to the approved PM method and verify free drainage where applicable.

CRITICAL

HVAC PM

HVAC PM item	Condition / result	Owner	Evidence	Action
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Execution tip: Recurring condensate problems can cause water damage, odors, microbial growth, and service interruption. Verify both drainage and the underlying cause of repeated...

27

Check condensate pumps, float switches, overflow switches, alarms, or shutdown controls for visible condition and required functional evidence where included in scope.

CRITICAL

HVAC PM

HVAC PM item	Condition / result	Owner	Evidence	Action
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Execution tip: Recurring condensate problems can cause water damage, odors, microbial growth, and service interruption. Verify both drainage and the underlying cause of repeated...

28

Inspect pipe insulation, vapor barriers, duct insulation, chilled-water lines, and nearby surfaces for condensation, damaged insulation, water staining, or mold-like growth.

CRITICAL

HVAC PM

Complete

Follow-up

Critical

LIVE PHOTO | Add

Execution tip: Recurring condensate problems can cause water damage, odors, microbial growth, and service interruption. Verify both drainage and the underlying cause of repeated...

29

Confirm active leaks, recurring condensation, blocked drains, wet ceiling areas, or overflow conditions have been converted into corrective work rather than repeatedly cleaned.

CRITICAL

HVAC PM

HVAC PM item	Condition / result	Owner	Evidence	Action
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Execution tip: Recurring condensate problems can cause water damage, odors, microbial growth, and service interruption. Verify both drainage and the underlying cause of repeated...

30

Escalate significant water leakage, failed condensate control, persistent moisture, damaged insulation, or repeated drainage failure for corrective maintenance.

CRITICAL

HVAC PM

HVAC PM item	Condition / result	Owner	Evidence	Action
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Execution tip: Recurring condensate problems can cause water damage, odors, microbial growth, and service interruption. Verify both drainage and the underlying cause of repeated...

6. Cooling equipment, chillers, condensing units, compressors, refrigerant-system observations, and service condition

31

Inspect chillers, condensing units, compressors, heat pumps, outdoor units, or packaged refrigeration components included in HVAC scope for visible service condition.

CRITICAL

HVAC PM

Complete

Follow-up

Critical

LIVE PHOTO | Add

Execution tip: Refrigerant circuits and sealed-system work should be handled only by appropriately qualified or licensed personnel where required. Routine PM should identify...

32

Check for oil staining, frost or icing, abnormal vibration, unusual noise, damaged pipework, insulation deterioration, corrosion, or other clues requiring specialist review.

CRITICAL

HVAC PM

Complete

Follow-up

Critical

LIVE PHOTO | Add

Execution tip: Refrigerant circuits and sealed-system work should be handled only by appropriately qualified or licensed personnel where required. Routine PM should identify...

33

Review approved operating pressures, temperatures, superheat or subcooling, approach temperatures, or other refrigerant-system readings only where these are part of qualified service procedures.

HVAC PM

HVAC PM item	Condition / result	Owner	Evidence	Action
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Execution tip: Refrigerant circuits and sealed-system work should be handled only by appropriately qualified or licensed personnel where required. Routine PM should identify...

34

Verify condenser coils, air intakes, discharge areas, cooling-tower interfaces, or heat-rejection surfaces are clean and unobstructed where applicable.

CRITICAL

HVAC PM

Complete

Follow-up

Critical

LIVE PHOTO | Add

Execution tip: Refrigerant circuits and sealed-system work should be handled only by appropriately qualified or licensed personnel where required. Routine PM should identify...

35

Confirm refrigerant-related repairs, leak investigation, charging, recovery, or sealed-system work are assigned to appropriately qualified personnel under applicable requirements.

CRITICAL

HVAC PM

HVAC PM item	Condition / result	Owner	Evidence	Action
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Execution tip: Refrigerant circuits and sealed-system work should be handled only by appropriately qualified or licensed personnel where required. Routine PM should identify...

36

Escalate suspected refrigerant leakage, compressor distress, repeated high-pressure or low-pressure trips, severe icing, or other abnormal cooling-system conditions.

CRITICAL

HVAC PM

HVAC PM item	Condition / result	Owner	Evidence	Action
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Execution tip: Refrigerant circuits and sealed-system work should be handled only by appropriately qualified or licensed personnel where required. Routine PM should identify...

7. Heating equipment, boilers, heat exchangers, electric heat, combustion interfaces, and seasonal readiness

37

Inspect boilers, furnaces, electric heaters, heat pumps, heating coils, terminal heaters, or other heating equipment included in the HVAC PM scope.

CRITICAL

HVAC PM

Complete

Follow-up

Critical

LIVE PHOTO | Add

Execution tip: Heating PM requirements vary significantly by equipment type. Use manufacturer instructions and qualified combustion or boiler specialists where the task goes beyond...

38

Check accessible heat exchangers, burners, heater banks, coils, cabinets, guards, flues, vents, and visible connections for damage, contamination, corrosion, or overheating clues.

CRITICAL

HVAC PM

Complete

Follow-up

Critical

LIVE PHOTO | Add

Execution tip: Heating PM requirements vary significantly by equipment type. Use manufacturer instructions and qualified combustion or boiler specialists where the task goes beyond...

39

Verify required seasonal cleaning, burner or heater inspection, ignition checks, combustion service, descaling, or specialist tests are documented where applicable.

CRITICAL

HVAC PM

HVAC PM item	Condition / result	Owner	Evidence	Action
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Execution tip: Heating PM requirements vary significantly by equipment type. Use manufacturer instructions and qualified combustion or boiler specialists where the task goes beyond...

40

Review approved temperature, pressure, flame, combustion, current, or safety-control readings where these are part of qualified maintenance procedures.

HVAC PM

HVAC PM item	Condition / result	Owner	Evidence	Action
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Execution tip: Heating PM requirements vary significantly by equipment type. Use manufacturer instructions and qualified combustion or boiler specialists where the task goes beyond...

41

Confirm high-limit controls, safety cutouts, guards, access panels, and other required safety devices disturbed during PM are restored before operation.

CRITICAL

HVAC PM

HVAC PM item	Condition / result	Owner	Evidence	Action
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Execution tip: Heating PM requirements vary significantly by equipment type. Use manufacturer instructions and qualified combustion or boiler specialists where the task goes beyond...

42

Escalate combustion concerns, damaged heat exchangers, overheating, repeated lockouts, flue or vent problems, or other conditions requiring specialist service.

CRITICAL

HVAC PM

HVAC PM item	Condition / result	Owner	Evidence	Action
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Execution tip: Heating PM requirements vary significantly by equipment type. Use manufacturer instructions and qualified combustion or boiler specialists where the task goes beyond...

8. Thermostats, sensors, actuators, dampers, valves, controls, BMS alarms, setpoints, and calibration clues

43

Inspect thermostats, temperature sensors, humidity sensors, pressure sensors, control panels, actuators, dampers, valves, and accessible control devices included in scope.

CRITICAL

HVAC PM

Complete

Follow-up

Critical

LIVE PHOTO | Add

Execution tip: Controls should be checked against the approved operating strategy. Avoid changing setpoints simply to silence a complaint without identifying sensor, actuator, airflow,...

44

Confirm required setpoints, operating schedules, occupied and unoccupied modes, holiday schedules, and seasonal settings match the approved facility strategy.

CRITICAL

HVAC PM

HVAC PM item	Condition / result	Owner	Evidence	Action
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Execution tip: Controls should be checked against the approved operating strategy. Avoid changing setpoints simply to silence a complaint without identifying sensor, actuator, airflow,...

45

Review BMS or controls alarms, overrides, disabled points, failed sensors, communication faults, and repeated manual overrides for unresolved HVAC issues.

CRITICAL

HVAC PM

HVAC PM item	Condition / result	Owner	Evidence	Action
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Execution tip: Controls should be checked against the approved operating strategy. Avoid changing setpoints simply to silence a complaint without identifying sensor, actuator, airflow,...

46

Check damper and valve actuators, linkages, end positions, visible movement, and commanded response where functional verification is included in the PM procedure.

CRITICAL

HVAC PM

HVAC PM item	Condition / result	Owner	Evidence	Action
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Execution tip: Controls should be checked against the approved operating strategy. Avoid changing setpoints simply to silence a complaint without identifying sensor, actuator, airflow,...

47

Verify calibration or comparison checks for temperature, humidity, pressure, or other critical sensors are completed at the required interval where applicable.

HVAC PM

HVAC PM item	Condition / result	Owner	Evidence	Action
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Execution tip: Controls should be checked against the approved operating strategy. Avoid changing setpoints simply to silence a complaint without identifying sensor, actuator, airflow,...

48

Escalate failed controls, stuck dampers, leaking valves, inaccurate sensors, repeated overrides, or unresolved BMS alarms into corrective maintenance.

CRITICAL

HVAC PM

HVAC PM item	Condition / result	Owner	Evidence	Action
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Execution tip: Controls should be checked against the approved operating strategy. Avoid changing setpoints simply to silence a complaint without identifying sensor, actuator, airflow,...

9. Ventilation, outdoor-air intake, exhaust, ducts, grilles, diffusers, dampers, airflow, and indoor-environment clues

49

Inspect outdoor-air intakes, exhaust outlets, louvers, screens, bird guards, grilles, diffusers, registers, and accessible air paths for blockage, dirt, damage, or contamination.

CRITICAL

HVAC PM

Complete

Follow-up

Critical

LIVE PHOTO | Add

Execution tip: Ventilation performance depends on clean airflow paths and working controls. Investigate persistent comfort, odor, condensation, or airflow complaints as system issues...

50

Confirm outside-air, return-air, relief, exhaust, or balancing dampers are not visibly stuck, disconnected, damaged, or obstructed.

CRITICAL

HVAC PM

Complete

Follow-up

Critical

LIVE PHOTO | Add

Execution tip: Ventilation performance depends on clean airflow paths and working controls. Investigate persistent comfort, odor, condensation, or airflow complaints as system issues...

51

Inspect accessible ductwork, flexible connections, access panels, insulation, supports, dampers, and visible seals for damage, leakage clues, condensation, or deterioration.

CRITICAL

HVAC PM

Complete

Follow-up

Critical

LIVE PHOTO | Add

Execution tip: Ventilation performance depends on clean airflow paths and working controls. Investigate persistent comfort, odor, condensation, or airflow complaints as system issues...

52

Review airflow, static pressure, temperature, humidity, carbon-dioxide or other indoor-environment readings where these are part of the approved facility monitoring plan.

HVAC PM

HVAC PM item	Condition / result	Owner	Evidence	Action

Execution tip: Ventilation performance depends on clean airflow paths and working controls. Investigate persistent comfort, odor, condensation, or airflow complaints as system issues...

53

Check toilet, pantry, kitchen, parking, plant-room, or other local exhaust systems included in scope for operation, cleanliness, and reported airflow issues.

CRITICAL

HVAC PM

HVAC PM item	Condition / result	Owner	Evidence	Action

Execution tip: Ventilation performance depends on clean airflow paths and working controls. Investigate persistent comfort, odor, condensation, or airflow complaints as system issues...

54

Escalate persistent odor, poor airflow, condensation, occupant comfort complaints, failed exhaust, blocked intakes, or damaged ductwork requiring corrective action.

CRITICAL

HVAC PM

HVAC PM item	Condition / result	Owner	Evidence	Action

Execution tip: Ventilation performance depends on clean airflow paths and working controls. Investigate persistent comfort, odor, condensation, or airflow complaints as system issues...

10. PM close-out, electrical condition, safe handback, defects, readings, work orders, trends, and final sign-off

55

Inspect visible electrical isolators, disconnects, starters, control enclosures, cables, conduit, wiring entries, and external components for damage, overheating clues, looseness, or poor condition.

CRITICAL

HVAC PM

Complete

Follow-up

Critical

LIVE PHOTO | Add

Execution tip: The HVAC PM task is complete only when the unit is safely handed back, readings are recorded, guards and panels are restored, defects have owners, and the next...

56

Confirm safe-isolation, permit, lockout or tagout, access-control, or other maintenance safety requirements were followed where applicable and all temporary controls were correctly cleared.

CRITICAL

HVAC PM

HVAC PM item	Condition / result	Owner	Evidence	Action
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Execution tip: The HVAC PM task is complete only when the unit is safely handed back, readings are recorded, guards and panels are restored, defects have owners, and the next...

57

Verify tools, rags, packaging, chemical containers, replaced filters, used belts, waste, temporary leads, and maintenance debris were removed from the HVAC work area.

CRITICAL

HVAC PM

Complete

Follow-up

Critical

LIVE PHOTO | Add

Execution tip: The HVAC PM task is complete only when the unit is safely handed back, readings are recorded, guards and panels are restored, defects have owners, and the next...

58

Record final operating readings, alarms, filter status, coil condition, condensate condition, fan or belt condition, control status, and other required PM results before close-out.

CRITICAL

HVAC PM

HVAC PM item	Condition / result	Owner	Evidence	Action
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Execution tip: The HVAC PM task is complete only when the unit is safely handed back, readings are recorded, guards and panels are restored, defects have owners, and the next...

59

Create or link corrective work orders for leaks, abnormal noise, failed controls, damaged insulation, refrigerant concerns, electrical defects, repeated alarms, or other unresolved HVAC findings.

CRITICAL

HVAC PM

HVAC PM item	Condition / result	Owner	Evidence	Action
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Execution tip: The HVAC PM task is complete only when the unit is safely handed back, readings are recorded, guards and panels are restored, defects have owners, and the next...

60

Record final HVAC PM status, critical open defects, overdue corrective work, seasonal risks, next PM date, technician, HVAC supervisor, facilities owner, and management approval.

CRITICAL

HVAC PM

FINAL STATUS | Enter

HVAC SUPERVISOR | Enter

FACILITIES APPROVAL | Enter

Execution tip: The HVAC PM task is complete only when the unit is safely handed back, readings are recorded, guards and panels are restored, defects have owners, and the next...