



# THERMAL CONCEPTS

## 10-Point HVAC Reliability Checklist (Fillable)

Site:

Location(s):

Date:

Evaluator:

Contact/Role:

### 1-Asset Inventory & Labeling

All major equipment tagged (ID, model/serial, tonnage/BTU)

Access paths & roof/MEP room clearances compliant

Latest one-line diagram / equipment list on file

Notes:

### 2-Filters & IAQ Basics

Filters correct size/MERV, dated, and within change interval

OA intakes clean; screens/intake paths unobstructed

No visible IAQ issues (mold, odors, moisture)

Notes:

### 3-Coils, Belts & Drains (PM Hygiene)

Evap/condenser coils clean; fins intact; no matting

Belts aligned, proper tension; sheaves not cupped

Condensate pans/traps clear; no standing water

Notes:

### 4-Airflow & Ventilation / Economizer

OA/RA/EA dampers move freely; linkages intact

Economizer logic operational (if equipped); no permanent overrides

Room complaints addressed with airflow checks

Notes:

### 5-Controls & BMS Discipline

Schedules, setpoints & deadbands match intent; no manual 'ho

Alarm hygiene in place; nuisance cleared

Trend logs on supply/return temps, OA %, runtimes

Notes:

### 6-Mechanical Health (Motors/Compressors/Fans)

Motor amps within nameplate; no abnormal vibration/noise

Compressors/fans start/stop as commanded; short-cycling absent

No oil/refrigerant stains; no obvious leaks

Notes:

### 7-Electrical & Safety

Disconnects labeled; lugs tight; no heat discoloration

Overcurrent protection matches nameplate/FLC

Guards, doors, panels, and safety interlocks in place

Notes:

### 8-Hydronics (If Applicable)

Water treatment logs current; glycol % verified (if used)

Strainers cleaned; pumps aligned; no cavitation/leaks

Cooling tower/boiler housekeeping acceptable

Notes:

### 9) Energy & Runtime Sanity Check

Runtimes align with occupancy; setbacks functioning

Economizer/free cooling used when conditions allow

Baseline utility/runtime data captured for savings estimate

Notes:

### 10-Documentation, Spares & Response Readiness

PM records up to date; warranty info accessible

Critical spares on hand (filters, belts, contactors, sensors)

Vendor access, roof permits, after-hours plan, and NTE in place

Notes:

Scoring: ✓=2, Partial=1, X=0 (exclude N/A). 18–20=Green • 12–17=Amber • ≤11=Red

### Top 5 Actions (90 days):


Total Score:

Follow-up: 15-min reliability review scheduled Date: