

HVAC Maintenance Checklist

Checklist · 23 items · 6 sections

Monthly, seasonal, and annual HVAC maintenance tasks for homeowners. Prevents breakdowns, extends equipment life, and keeps energy bills lower throughout the year.

Open the editable, AI-powered version online:

<https://genechecklist.com/checklist/hvac-maintenance-checklist>

MONTHLY

- Check and replace air filter (every 1-3 months depending on filter type and home)

HIGH

1-inch filters: every 1-2 months. 4-inch filters: every 6-12 months. More often with pets or allergies

- Check thermostat is working and set correctly
- Listen and look for unusual noises, smells, or performance changes

HIGH

- Verify all vents are open and unblocked by furniture

SEASONAL (SPRING & FALL)

- Switch thermostat from heat to cool (or vice versa): test both modes work

HIGH

- Clean around outdoor condenser unit: remove debris, leaves, and vegetation within 2 feet

HIGH

- Inspect outdoor condenser fins: straighten bent fins with a fin comb if needed
- Check condensate drain line: pour diluted bleach down drain to prevent clogs

HIGH

Clogged condensate drain causes water damage and system shutdown

- Inspect and clean evaporator coil (inside unit) if accessible
- Check refrigerant lines for frost or ice buildup: indicates low refrigerant

HIGH

- Inspect ductwork for visible leaks, gaps, or disconnected sections
- Test smoke and carbon monoxide detectors near HVAC equipment

HIGH

ANNUAL (HEATING SYSTEM)

- Inspect furnace heat exchanger for cracks (hire a professional: CO leak risk)
HIGH
- Clean furnace burners and combustion chamber
HIGH
- Inspect flue pipe and venting for blockages or corrosion
HIGH
- Test ignition system and safety controls
HIGH
- Lubricate blower motor and fan bearings if applicable

ANNUAL (COOLING SYSTEM)

- Professional AC tune-up: refrigerant check, coil cleaning, electrical inspection
HIGH
Schedule in early spring before peak season: HVAC techs are booked in summer
- Check electrical connections and capacitors for wear
HIGH

EFFICIENCY UPGRADES

- Upgrade to a smart/programmable thermostat (saves 10-15% on energy bills)
- Seal duct leaks with mastic or foil tape (not duct tape: it fails over time)
- Add insulation to attic if under-insulated: biggest single efficiency improvement

PLANNING

- Note equipment age: furnaces last 15-20 years, AC units 10-15 years
Plan and budget for replacement rather than being surprised by failure at peak season