

Website showcase — Quill Bulk: Preventive maintenance checklist for commercial HVAC rooftops



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Introduction & Checklist Purpose

Use this checklist to inspect, clean, test, and document commercial rooftop HVAC units (RTUs) in a consistent order. Facility teams, HVAC technicians, project managers, and quality controllers can use it to track work across one or more units.

Schedule maintenance according to the equipment manufacturer's instructions, site requirements, and service plan. Spring and fall are common times for routine RTU inspections; adjust timing to your climate and operating needs. Before starting, identify each unit and confirm that assigned personnel are qualified for the tasks.

Pre-Task Preparation

- ☐ **[High]** Identify the unit by asset tag, location, make, model, and service history.
- ☐ **[High]** Review the manufacturer's maintenance instructions, site procedures, and previous inspection notes.
- ☐ Confirm the work scope, tools, replacement filters, and other approved parts.
- ☐ Coordinate access with building operations and note any occupant or operating constraints.
- ☐ Inspect the roof access route and work area; follow site fall-protection and electrical-safety procedures.

WARNING:

Do not work on energized equipment or access the roof without appropriate authorization, training, and safeguards. Isolate equipment where required by site procedures. Refer electrical, refrigerant, and other restricted work to qualified personnel.

Main Checklist Items (Grouped by Phase)

Phase 1: Inspect and clean

- ☐ **[High]** Inspect filters; replace dirty or damaged filters with the specified type and size.
- ☐ Clean the filter compartment as needed and confirm filters seat correctly.
- ☐ Inspect condenser and evaporator coils; clean when required using approved methods.
- ☐ Check the drain pan and condensate line for blockage, standing water, or visible damage.

- ☐ Inspect the cabinet, outdoor-air dampers, and accessible ductwork for damage or obstruction.

Phase 2: Check mechanical and electrical components

- ☐ **[High]** Inspect blower assemblies, motors, belts, and pulleys for wear, damage, or looseness.
- ☐ Lubricate bearings only when the manufacturer specifies it.
- ☐ Have qualified personnel inspect electrical connections and disconnects under applicable site procedures.
- ☐ Check refrigerant lines for visible damage or signs of leakage; escalate concerns to qualified personnel.

Phase 3: Test operation and controls

- ☐ Test thermostat response and applicable safety controls.
- ☐ Verify heating and cooling operation, airflow, and outside-air damper operation.
- ☐ Check system pressures and refrigerant charge only as permitted by the service scope and technician qualifications.
- ☐ Test relevant building-management-system controls, alarms, and sensor readings.

These tasks reflect common commercial HVAC checklist categories, including filters, coils, blower assemblies, controls, drains, and refrigerant checks ([commercial HVAC maintenance checklist](#); [RTU preventive maintenance checklist](#)).

Critical Items to Double-Check

- ☐ **[Critical]** Confirm filters are the specified size and are installed in the correct direction, where direction is marked.
- ☐ **[Critical]** Confirm access panels and electrical disconnect covers are restored and secured after work.
- ☐ **[Critical]** Confirm drains are clear and condensate can flow without visible backup.
- ☐ **[Critical]** Record any suspected refrigerant leak, abnormal operating condition, or failed safety control; do not mark the issue resolved without verification.
- ☐ Confirm operating modes and control settings match the approved site requirements after testing.

STOP AND ESCALATE:

If you find unsafe access, damaged wiring, suspected refrigerant leakage, or a failed safety device, follow site procedures and notify the responsible supervisor before returning the unit to service.

Common Items Often Missed

- ☐ Check the filter compartment itself, not only the filter. Look for dirt buildup or damage.
- ☐ Inspect belts and pulleys alongside the blower motor; recording a motor check alone does not verify the full assembly.
- ☐ Check the drain pan and condensate line together, then confirm drainage after any cleaning.
- ☐ Include dampers, thermostat response, and BMS controls in the inspection rather than focusing only on mechanical components.

- ☐ Record deficiencies and incomplete work separately from completed tasks. Note who owns each follow-up and its status.

For sites with multiple equipment types, keep RTU records distinct from checks for chillers, cooling towers, or other systems. Use the maintenance schedule and asset documentation that apply to each unit.

Completion Verification

Before closing the work order, compare each completed task with the equipment-specific scope and review all exceptions. Verify that replaced parts match the specified requirements and that panels, covers, and access points are secure.

- ☐ Record the unit identifier, inspection date, technician, and tasks completed.
- ☐ Document measurements or test results required by the site or manufacturer, with units and operating conditions where applicable.
- ☐ Record defects, corrective actions, parts used, and any work deferred.
- ☐ Confirm the unit's operating status and control response against the approved service criteria.
- ☐ Have the designated reviewer check the record for missing tasks, unclear findings, or unresolved critical items.

Completion standard: Every applicable task is verified or clearly marked as not completed, with a reason and follow-up owner. Do not treat an unchecked item as complete.

Next Steps After Completion

Enter the completed inspection and outstanding work into the site's maintenance records. Assign corrective actions to a responsible person, set a due date according to risk and site procedure, and track the action until it is verified. Escalate urgent safety or operating concerns through the established process.

Use findings to prepare the next service visit: note recurring defects, parts to stage, and checks requiring specialist support. Keep the checklist aligned with the current equipment instructions, site procedures, and service scope; review it when those change.

Conclusion

A reliable RTU maintenance record shows what was inspected, what was found, and what remains unresolved. Work through the items in order, verify each action against the equipment and site requirements, and confirm it before ticking the box.

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