

# A Heating Checklist

Here is a checklist, borrowed in part from Johnson Controls, to help you make a smooth transition to the primary heating season.

## Automatic Temperature Controls

### Air Compressor

- Drain tank and check traps.
- Change oil and check oil pressure.
- Check belt and sheaves. Change as required.
- Change suction filter as required.
- Check unloader and check valve.
- Check high-pressure safety valve.
- Check motor operating conditions and lubricate.
- Check PE switch, starter and alternator.
- Clean and paint as required.

### Refrigerated Air Dryer

- Check refrigerant pressure.
- Check refrigerant temperature.
- Clean condenser and cover grills.
- Check drain trap and bypass valves.

### Fan Systems and HVAC Unit Controls

- Review sequence of operation.
- Check all dampers and lubricate.
- Check pilot positioners.
- Check all control valves.
- Calibrate all controllers.
- Calibrate all transmitters and receiver gauges.
- Check all solenoid air valves, PE switches and air valves.
- Check all auxiliary control devices.

### Fans and Central Fan Systems

- Check and clean fan assembly.
- Lubricate fan bearings per manufacturer's recommendations.
- Lubricate motor bearings per manufacturer's recommendations.
- Check belts and sheaves. Replace and adjust as required.
- Tighten all nuts and bolts.
- Check motor mounts and vibration pads. Replace and adjust as required.
- Check motor operating conditions.
- Inspect electrical connections and contactors.
- Lubricate and adjust associated dampers and linkage.
- Check fan operation.
- Check and clean drains and drain pans.
- Check and clean strainers. Check steam traps and hand valves.
- Check filter advancing mechanism. Lubricate and adjust as required.
- Inspect filters.
- Check heating coils.
- Inspect humidifier.

### Unit Ventilator

- Brush and vacuum grills, coil, fan and unit interior.
- Lubricate fan and motor bearings per manufacturer's recommendations.
- Check belt and sheaves. Replace and adjust as required.
- Check and clean drains and drain pan.
- Check and clean strainers. Check steam traps and hand valves.
- Inspect filters.
- Check unit operating conditions.
- Lubricate and adjust dampers and linkage.
- Clean and paint exterior surfaces as required.

## Fan Coils/Unit Heaters

- Brush and vacuum coil, fan and housing as required.
- Lubricate fan and motor bearings per manufacturer's recommendations.
- Check belt and sheaves. Replace and adjust as required.
- Check and clean strainers. Check steam traps and hand valves.
- Inspect electrical connections, contactors, relays and operating/safety controls.
- Check unit operation. Adjust as required.

## Radiation

- Visually inspect fins/cast iron. Clean as required.
- Check and clean strainers. Check steam traps and hand valves.

## Induction Units

- Visually inspect coil. Clean as required.
- Check and clean drains and drain pans.
- Clean discharge grill.
- Check and clean strainers. Check steam traps and hand valves.

## Reheat Coils

- Visually inspect coil. Clean as required.
- Check and clean strainers. Check steam traps and hand valves.

## Boxes – Dual Duct and Variable Air Volume

- Inspect box for duct work connection.
- Lubricate and adjust dampers and linkage.

## Misc. HVAC Equipment

### Heat Exchanger

- Visually check for leaks. Tighten connections.
- Verify pressure gauge and thermometer accuracy.
- Check and clean strainers. Check steam traps and hand valves.
- Check operating safety devices.

### Humidifiers

- Check and clean strainers. Check steam trap and hand valves.
- Clean and check float assembly.
- Check and clean drains and drain pan.

- Clean heating element.
- Inspect electrical connections, relays, contactors and operating/safety controls.
- Clean plugged spray nozzles.
- Check unit operating conditions.

## Steam Pressure-Reducing Valves

- Verify accuracy of gauges.
- Check unit operation and lubricate as required.
- Test operation of trip valves.

## Freezing Weather Checklist

### Boiler and Piping

- Check all steam traps for proper function.

### Mechanical Equipment

- Drain all idle pumps and compressors. Make sure jackets are vented.
- Provide proper lubrication for cold weather operation.
- Lay up chilled-water equipment and piping properly to prevent rusting and bacterial growth.
- Install no-flow switches and alarms in cooling water lines.

*Please be sure that all maintenance is performed by qualified personnel and in conformance with codes and manufacturer's recommendations.*



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