



## Emergency HVAC Repair Pros

*We solve the HVAC problems other contractors won't.*

FIELD GUIDE · BIRMINGHAM, ALABAMA

# Commercial HVAC Preventive Maintenance Spec Sheet

*A facility manager's spec for what real commercial HVAC maintenance should include. Use it to vet contractors. Use it to write RFPs.*

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**Who this is for:** Facility managers, property managers, building owners, GMs of restaurants and retail with rooftop units, anyone responsible for commercial HVAC uptime.

**What's inside:** Quarterly inspection checklist (28 line items), monthly checklist (8 items), annual deliverables, what should appear on every visit report, contract red flags, and a side-by-side comparison framework.

**Service area:** Commercial HVAC across the Birmingham, AL metro



# Commercial HVAC Preventive Maintenance Spec Sheet

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## Why Vague PM Contracts Fail

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"Quarterly maintenance" with no defined scope means whatever the contractor decides to do that day. That's how facility managers end up paying \$4,000/year for \$400 worth of work. This spec defines what should be done, what should be measured, and what should be reported — so you're paying for outcomes, not handshakes.

## Monthly Checklist (Per Unit)

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For sites with 24/7 operations, restaurants, or high-occupancy buildings, monthly PM is the standard.

- Air filter inspection and replacement when  $\Delta P$  exceeds spec (typically 0.5" w.c. for 2" pleated)
- Condenser coil visual inspection
- Drain pan inspection for standing water
- Belt tension and wear check (if belt-driven)
- Outdoor unit clearance check (no debris within 24")
- Thermostat function verification
- Visual inspection of refrigerant line insulation
- Note any unusual sounds, smells, or visible damage

# Quarterly Checklist (Per Unit)

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Standard for office buildings, retail without heavy kitchen load.

- All monthly items
- Condenser coil cleaning (chemical or rinse, depending on fouling)
- Evaporator coil inspection and cleaning if needed
- Refrigerant pressure check — suction and discharge, recorded against ambient
- Superheat and subcooling measured and recorded
- Capacitor microfarad reading (compare to rated value  $\pm 6\%$ )
- Compressor amp draw under load (compared to RLA)
- Blower motor amp draw
- Belt replacement if showing cracks, glazing, or wear past 10%
- Drain line flushed with biocide
- Float switch function tested
- Contactor inspection — pitting, carbon, voltage drop across contacts
- Control wiring inspection
- Crankcase heater verified operational (heat season prep)
- Defrost cycle verified (heat pump units)
- Economizer dampers checked for movement and seal (if applicable)
- Outside-air damper actuator verified
- Reversing valve function verified (heat pump units)
- Heat exchanger visual inspection (gas units)
- Flame sensor cleaning (gas units, heating season)
- CO test on exhaust (gas units, heating season)
- Roof curb seal inspection (rooftop units)
- Disconnect and fuse inspection
- Cabinet panel sealing and screws verified
- Belt and pulley alignment verified
- All access panels closed and secured
- Site cleaned of debris from service

- Written PM report submitted within 5 business days

## **Annual Items (Once a Year, Pre-Cooling Season)**

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- Refrigerant leak check using electronic detector — ALL fittings
- Coil deep-clean with approved chemical (alkaline for outdoor, neutralized for indoor)
- Blower wheel removal and cleaning
- Ductwork interior visual inspection at AHU
- IAQ assessment if requested (CO<sub>2</sub>, particulates, RH)
- Energy efficiency baseline — record kW/ton under standard conditions
- Predictive replacement recommendations for components nearing end-of-life

## **Visit Report — Required Fields**

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Every PM visit should produce a written report containing:

- Date, time-in, time-out, technician name and certifications
- Each unit serviced — make, model, serial, location, age
- All measured values (pressures, amps, capacitor  $\mu$ F, superheat/subcooling)
- Standard against which each was measured (manufacturer spec)
- Items found out of spec
- Recommended repairs with priority (immediate, 30 days, 90 days, monitor)
- Photos of any safety items, water damage, or significant findings
- Tech signature

## Contract Red Flags

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Walk away from any PM contract that:

- Lists "quarterly tune-up" with no itemization
- Charges flat per-visit without scope definition
- Has no written report requirement
- Doesn't include refrigerant pressure/superheat recordings
- Doesn't list a turnaround for repair recommendations
- Bundles parts/labor for all repairs into "additional services" with no cap
- Auto-renews without 30-day cancellation notice

## How to Bid This Out

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For multi-unit facilities (5+ rooftops), use this spec sheet as the literal SOW in your RFP. Ask for:

- Per-unit annual price (quarterly visits + annual deep service)
- Standard hourly rate for repairs outside PM scope
- After-hours hourly rate
- Markup percentage on parts
- Sample PM report from another commercial client (redacted)
- Three references — similar building type, similar number of units

# About Emergency HVAC Repair Pros

**Emergency HVAC Repair Pros** — We solve the HVAC problems other contractors won't.

Commercial HVAC across the Birmingham, AL metro

This guide was written by working HVAC techs, not marketing teams. Direct, honest, practical. Real Alabama numbers, real local context, no guarantees we can't back up.

If something in here saved you a service call — or saved you from a bad one — share it with a neighbor. That's the whole point.

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*Licensed Alabama HVAC contractor. Written estimates. No surprise bills.*