

Property Manager Quarterly HVAC Audit Template

A fillable, multi-unit HVAC audit template for Birmingham commercial property managers. Standard checks per unit. Quarterly cadence. Audit-trail-ready.

WHO IT IS FOR

Commercial property managers, multifamily property managers, and facilities directors overseeing multi-unit Birmingham properties.

WHAT IS INSIDE

The 22-point per-unit audit, multi-unit summary grid, quarterly cadence calendar, documentation standards, and what to escalate to a tech.

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Read online: <https://emergencyhvacrepairpros.com/downloads/property-manager-quarterly-hvac-audit-template/>

How this template works

Print one audit sheet per HVAC unit on the property. Fill in once per quarter (March, June, September, December). Photograph any flagged item. Tally exceptions at the property level on the summary grid. Use the cadence calendar to keep all units on schedule. Keep audits filed by property for owner reporting and lender requests.

Per-unit audit -- section 1: identification

- * Property name and unit/tenant identifier
- * HVAC unit ID / tag number
- * Manufacturer, model, serial number (from data plate)
- * Nominal capacity (tons or Btu/hr)
- * Year of installation
- * Refrigerant type (R-22, R-410A, R-454B, R-32)
- * Zone served / area of property
- * Audit date
- * Auditor name and contact

Per-unit audit -- section 2: visual inspection

- * Cabinet condition (rust, dents, structural integrity) -- Pass / Fail / Note
- * Roof curb (if RTU) -- sealed, secure, no ponding water -- Pass / Fail / Note
- * Condensate drain -- clear, flowing, no algae -- Pass / Fail / Note
- * Refrigerant line insulation -- intact, no UV degradation -- Pass / Fail / Note
- * Electrical disconnect -- accessible, labeled, operational -- Pass / Fail / Note

Per-unit audit -- section 3: airflow

- * Filter installed, correct MERV, dated -- Pass / Fail / Note
- * Filter age in days at audit
- * Return-air grille -- clear, clean, no obstructions -- Pass / Fail / Note
- * Supply-air registers -- open, clean, no dust streaks on ceiling -- Pass / Fail / Note
- * Visible duct condition -- intact, insulated, no separations -- Pass / Fail / Note

Per-unit audit -- section 4: condenser / coil

- * Outdoor coil clean (no debris, leaves, pollen mat) -- Pass / Fail / Note
- * Coil fins straight (no extensive flattening) -- Pass / Fail / Note
- * 2-foot clearance around outdoor unit maintained -- Pass / Fail / Note
- * No obvious refrigerant oil residue at fittings -- Pass / Fail / Note

Per-unit audit -- section 5: operation

- * System cycles normally during audit window -- Pass / Fail / Note
- * No unusual sounds (capacitor hum, screech, grinding) -- Pass / Fail / Note
- * Cool air delivery temperature differential at supply (16-22 deg F below return) -- _____ deg F
- * Indoor humidity reading during cooling operation (target 45-55% summer) -- _____ %
- * Thermostat functional, set to occupied zone schedule -- Pass / Fail / Note

Per-unit audit -- section 6: service record

- * Last documented professional service (date)
- * Last filter change documented (date)
- * Open service tickets associated with this unit
- * Refrigerant top-offs in last 12 months (count and pounds)
- * Age vs replacement threshold (under 10 = healthy, 10-13 = monitor, 14+ = replace plan)

Multi-unit summary grid

For each property, summarize across units:

- * Total HVAC units audited this quarter
- * Units with all-pass status
- * Units with one or more "Note" entries
- * Units with one or more "Fail" entries
- * Units flagged for tech follow-up (with priority)
- * Average filter age across units
- * Total refrigerant top-off pounds across portfolio this quarter
- * Units at age 13+ years -- replacement plan status

Quarterly cadence

Optimal calendar for Birmingham:

- * Q1 -- March audit. Pre-cooling-season prep. Spring tune-ups already booked for pro service
- * Q2 -- June audit. Mid-cooling-season verification. Catch early summer issues before peak July
- * Q3 -- September audit. Post-summer condition review. Identify cooling-season failures to repair
- * Q4 -- December audit. Pre-heating-peak verification. Confirm heating systems operational

When to escalate to a tech

Trigger a service call when:

- * Any "Fail" entry on inspection, airflow, condenser, or operation sections
- * Filter not changed within policy interval
- * Temperature differential below 14 deg F at supply (refrigerant or coil issue)
- * Refrigerant top-off in last 12 months (leak -- needs diagnosis)
- * Unusual sounds -- capacitor or other early-failure indicator
- * Drain pan water or clog -- float switch will eventually shut system off
- * Unit age 13+ years AND any open issues -- replacement plan conversation

Documentation standards

Keep:

- * Completed audit sheet per unit per quarter
- * Photos of all flagged items (date-stamped)
- * Tech service tickets following the audit
- * Refrigerant log per Section 608 thresholds (over 50 lb charge)
- * Equipment age log with replacement-budget timeline
- * Vendor certificates of insurance current
- * Annual capital reserve study assumption update for HVAC line items

What ownership and lenders will ask for

On a typical asset review:

- * Last 4 quarters of completed audits
- * Service ticket logs by unit
- * Capital replacement schedule for HVAC by year
- * Vendor list with licensure verification
- * Compliance documentation (Section 608 logs, ASHRAE 62.1 ventilation, etc.)

Sources

- * ASHRAE Standard 180 -- Inspection and Maintenance protocol
- * ASHRAE Standard 62.1 -- Ventilation for Acceptable Indoor Air Quality
- * BOMA International -- Operational reporting benchmarks
- * IFMA -- Facility management best practices
- * EPA Section 608 -- Refrigerant management thresholds
- * ACCA Standard 4 -- Quality Maintenance
- * IREM -- Institute of Real Estate Management standards

Disclaimer

This guide is informational. It is not a substitute for licensed HVAC inspection, diagnosis, or service. Conditions vary by home and equipment. Refrigerant work, gas-line work, and high-voltage electrical work require an EPA Section 608 certified technician and a licensed HVAC contractor under Alabama law. When in doubt, call.

No pricing on this site is a quote. No response time is a guarantee. All ranges shown are observed market data, not promises.

About the author

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John has been turning wrenches on Birmingham HVAC systems for 25 years. Alabama HVAC contractor licensed, bonded, and insured. EPA Section 608 Universal certified. He has walked roofs, attics, crawlspaces, and condenser pads across every neighborhood in this metro and has written every guide on this site from the working tech's perspective -- not the salesman's.

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