

HVAC Preventive Maintenance Checklist Pack (Excel)

18 equipment checklists • 330 maintenance tasks • Dashboard • Asset register • Defect log

18

Equipment
checklists

330

Maintenance
tasks

143

Operating
readings

5

Frequencies
W / M / Q / SA / A

What's included

- Dedicated checklist sheet for each equipment type
- Pick the visit type (W/M/Q/SA/A): the due tasks are marked automatically
- Acceptance criteria for every task, plus a readings table
- Auto completion %, Not OK count and job status
- Live dashboard across all 18 checklists
- Asset register with next-due dates and overdue alerts
- Defect log with priority, status and days open
- Equipment-specific safety notes and 3-party sign-off
- Print-ready A4 layout; unlocked and fully editable
- Add your company name once; it shows on every sheet

Equipment covered

- 01 Split, Cassette & Ducted Split AC Units
- 02 VRF / VRV Multi-Split Systems
- 03 Packaged Units & Rooftop Units (DX)
- 04 Air-Cooled Chillers (Scroll / Screw)
- 05 Water-Cooled Chillers (Screw / Centrifugal)
- 06 Cooling Towers (Open & Closed Circuit)
- 07 Air Handling Units (AHU)
- 08 Fan Coil Units (FCU)
- 09 Fresh Air Handling Units & Heat Recovery (FAHU / DOAS / ERV)
- 10 Pumps (Chilled, Condenser & Hot Water)
- 11 Ventilation Fans (Supply, Exhaust, Toilet, Car-Park Jet Fans)
- 12 Commercial Kitchen Exhaust Systems
- 13 Stair Pressurization & Smoke Extract Systems
- 14 Boilers & Water Heaters
- 15 Hydronic Systems, PHE / ETS & Water Treatment
- 16 Ductwork, Dampers, VAV & Air Terminals
- 17 BMS / Controls & Thermostats
- 18 Precision AC / CRAC & CRAH Units

PPM DASHBOARD

Sample Facility Services Co. | Live summary of all 18 equipment checklists - click a name to open its sheet

#	Equipment Checklist	Total Tasks	Weekly	Monthly	Quarterly	Semi-Annual	Annual	Readings	Current Visit	Applicable	Completed	Not OK	Completion %	Status
1	Split, Cassette & Ducted Split AC Units	25	0	2	12	10	1	9	Q	14	14	1	100%	COMPLETE - DEFECTS
2	VRF / VRV Multi-Split Systems	21	0	2	9	8	2	7	All	21	0	0	0%	Not started
3	Packaged Units & Rooftop Units (DX)	23	0	4	10	6	3	9	All	23	0	0	0%	Not started
4	Air-Cooled Chillers (Scroll / Screw)	28	3	4	9	5	7	12	M	7	7	0	100%	COMPLETE
5	Water-Cooled Chillers (Screw / Centrifugal)	26	4	5	4	1	12	12	Q	13	8	1	62%	IN PROGRESS
6	Cooling Towers (Open & Closed Circuit)	23	2	6	9	3	3	9	M	8	8	1	100%	COMPLETE - DEFECTS
7	Air Handling Units (AHU)	24	0	3	11	6	4	13	Q	14	14	2	100%	COMPLETE - DEFECTS
8	Fan Coil Units (FCU)	15	0	1	4	9	1	5	SA	14	11	0	79%	IN PROGRESS
9	Fresh Air Handling Units & Heat Recovery (FAHU / DOAS / ERV)	18	0	3	9	3	3	9	All	18	0	0	0%	Not started
10	Pumps (Chilled, Condenser & Hot Water)	17	0	4	6	4	3	8	Q	10	10	0	100%	COMPLETE
11	Ventilation Fans (Supply, Exhaust, Toilet, Car-Park Jet Fans)	14	0	2	5	5	2	6	All	14	0	0	0%	Not started
12	Commercial Kitchen Exhaust Systems	13	2	2	6	2	1	4	All	13	0	0	0%	Not started
13	Stair Pressurization & Smoke Extract Systems	12	0	3	1	5	3	7	SA	9	4	0	44%	IN PROGRESS
14	Boilers & Water Heaters	14	1	4	1	0	8	7	All	14	0	0	0%	Not started
15	Hydronic Systems, PHE / ETS & Water Treatment	18	0	6	4	3	5	9	All	18	0	0	0%	Not started
16	Ductwork, Dampers, VAV & Air Terminals	12	0	0	1	2	9	4	All	12	0	0	0%	Not started
17	BMS / Controls & Thermostats	13	1	2	4	3	3	6	M	3	3	0	100%	COMPLETE
18	Precision AC / CRAC & CRAH Units (Data Centres)	14	0	5	7	2	0	7	All	14	0	0	0%	Not started
TOTAL		330	13	58	112	77	70	143		239	79	5	33%	

EQUIPMENT REGISTER STATUS	
Assets registered	14
PPM overdue	4
PPM due within 14 days	3
PPM scheduled	7
Open defects	3

PPM CHECKLIST - AIR HANDLING UNITS (AHU)

Sample Facility Services Co. | Preventive Maintenance Record

Site / Project	Sample Tower, Doha	Visit Date	28-Sep-2026
Building / Location	Plant Room - Roof	Maintenance Visit (W/M/Q/SA/A)	Q
Equipment Tag No.	AHU-R-01	Technician	J. Perera
Make / Model	Example Make / AHU-1250	Work Order No.	WO-26-0918
Serial No.	SN-2022-00457	Run Hours / Meter	18,240 h

⚠ SAFETY: Isolate & lock-out/tag-out (LOTO) before opening panels or touching rotating parts. Verify zero energy. Use PPE: gloves, safety glasses, safety shoes. Refrigerant work by certified technicians only. Fan must be fully stopped before opening access doors.

Tasks applicable / completed / Not OK / completion:	14	14	2 item(s) Not OK	100%	COMPLETE - DEFECTS
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No.	Maintenance Task	Freq.	Due this visit	Acceptance Criteria	Status	Remarks / Corrective Action
FILTERS						
1	Record filter ΔP; replace pre-filters	M	Yes	Replace at final ΔP	OK	
2	Replace bag / secondary filters	Q	Yes	Replace at final ΔP or per schedule	OK	
3	Check filter frames and seals for bypass	Q	Yes	No bypass; gaskets intact	Not OK	Belt glazed - replaced, re-tensioned
COILS & DRAIN						
4	Clean and disinfect drain pan; check trap	M	Yes	Free draining; trap primed	OK	
5	Inspect moisture eliminators	Q	Yes	Clean; correctly positioned	Done	
6	Clean cooling / heating coils	SA	-	Clean; fins straight		
7	Check CHW control valve full stroke	Q	Yes	Opens / closes fully on command	OK	
FAN SECTION						
8	Inspect belts: tension, wear and alignment	M	Yes	Tension per OEM	Done	
9	Lubricate fan and motor bearings	Q	Yes	Correct grease; no overheating	OK	
10	Check EC / plug fan motors	Q	Yes	No alarms; normal noise	Done	
11	Clean fan wheel; check balance and vibration	SA	-	Within ISO 10816 limits		
12	Check flexible connections and anti-vibration mounts	SA	-	Intact; isolating		
13	VFD: check parameters, clean heat sink / filters	Q	Yes	Clean; parameters as commissioned	Done	
DAMPERS & HEAT RECOVERY						
14	Check OA / RA / EA dampers, linkages and actuators	Q	Yes	Full stroke; blades seal	OK	
15	Inspect heat recovery device (wheel / plate / run-around)	Q	Yes	Clean; operating	OK	
16	Inspect humidifier (if fitted)	Q	Yes	Clean; no scale; drain OK	Done	
CASING						
17	Inspect panels, door gaskets and casing leakage	SA	-	No air leakage		
18	Inspect internal insulation for damage / mould	SA	-	Intact; no growth		
19	Check internal lights and door switches	SA	-	Working		
CONTROLS, SAFETY & PERFORMANCE						
20	Calibrate sensors (temp, RH, CO2, pressure)	A	-	Within tolerance		
21	Test fire-alarm shutdown / duct smoke detector interlock	A	-	AHU stops on FA signal		
22	Measure motor current and voltage	Q	Yes	<= FLA	Not OK	Drain pan slime - cleaned, biocide added
23	Tighten terminals; check isolator	A	-	No loose terminals		
24	Measure supply airflow and external static pressure	A	-	Within +/-10% of design		

OPERATING READINGS						
No.	Parameter	Unit	Typical / Acceptable	Reading	Remarks	
1	Pre-filter ΔP	Pa	< final	145		
2	Final filter ΔP	Pa	< final	210		
3	Outdoor air temperature	°C	-	41.5		
4	Return air temperature	°C	-	24.0		
5	Supply air temperature	°C	Design	13.2		
6	Supply air RH	%	-	88		
7	CHW entering temperature	°C	Design	6.8		
8	CHW leaving temperature	°C	Design	12.1		
9	CHW valve position	%	-	72		
10	Fan speed	Hz	-	46		
11	Fan motor current	A	<= FLA	18.6		
12	Supply airflow	m³/h	Design +/-10%	11,950		
13	External static pressure	Pa	Design	480		

GENERAL COMMENTS / RECOMMENDATIONS
Unit operating satisfactorily. Recommend replacing bag filters at next visit (ΔP approaching final). Belt set replaced during this visit.

Technician	Supervisor / Engineer	Client Representative
Name:	Name:	Name:
Signature:	Signature:	Signature:
Date:	Date:	Date:

HVAC EQUIPMENT REGISTER & PPM TRACKER

Sample Facility Services Co. | Yellow = input. Next PPM Due and PPM Status calculate automatically. Row 5 is an example - overwrite it.

No.	Equipment Tag	Equipment Type	Building / Location	Area Served	Make	Model	Serial No.	Capacity	Refrigerant	Install Date	Operating Status	PPM Freq.	Last PPM Date	Next PPM Due	PPM Status	Remarks
1	CH-01	Air-Cooled Chillers (Scroll / Screw)	Roof - Chiller Yard	Whole building	Example Make	ACX-400	SN-1000	400 TR	R-134a	10-Jan-2021	In Service	M	10-Sep-2026	10-Oct-2026	Due in 14 days	
2	CH-02	Air-Cooled Chillers (Scroll / Screw)	Roof - Chiller Yard	Whole building	Example Make	ACX-400	SN-1037	400 TR	R-134a	10-Feb-2022	In Service	M	16-Aug-2026	15-Sep-2026	Overdue	
3	AHU-R-01	Air Handling Units (AHU)	Plant Room - Roof	Floors 10-20	Example Make	AHU-1250	SN-1074	12,500 m³/h	-	10-Mar-2023	In Service	Q	28-Sep-2026	28-Dec-2026	Scheduled	
4	AHU-R-02	Air Handling Units (AHU)	Plant Room - Roof	Floors 1-9	Example Make	AHU-1250	SN-1111	12,500 m³/h	-	10-Apr-2024	In Service	Q	22-Jun-2026	21-Sep-2026	Overdue	
5	FAHU-01	Fresh Air Handling Units & Heat Recovery (FAHU / DOAS / ERV)	Roof	Common areas	Example Make	FAH-800	SN-1148	8,000 m³/h	R-410A	10-May-2021	In Service	Q	12-Jul-2026	11-Oct-2026	Due in 14 days	
6	CHWP-01	Pumps (Chilled, Condenser & Hot Water)	Basement B1 Plant	Primary CHW	Example Make	EC-150	SN-1185	95 m³/h	-	10-Jun-2022	In Service	Q	31-Aug-2026	30-Nov-2026	Scheduled	
7	CHWP-02	Pumps (Chilled, Condenser & Hot Water)	Basement B1 Plant	Primary CHW (Std-by)	Example Make	EC-150	SN-1222	95 m³/h	-	10-Jul-2023	Standby	Q	31-Aug-2026	30-Nov-2026	Scheduled	
8	CT-01	Cooling Towers (Open & Closed Circuit)	Podium Roof	Condenser water	Example Make	CT-600	SN-1259	600 TR	-	10-Aug-2024	In Service	M	26-Aug-2026	25-Sep-2026	Overdue	
9	FCU-12-01	Fan Coil Units (FCU)	Level 12 - Office	Open office	Example Make	FCU-600	SN-1296	600 CFM	-	10-Sep-2021	In Service	SA	01-Aug-2026	30-Jan-2027	Scheduled	
10	SPF-01	Stair Pressurization & Smoke Extract Systems	Roof - Stair 1	Stair 1 pressurization	Example Make	AX-630	SN-1333	18,000 m³/h	-	10-Oct-2022	In Service	M	18-Sep-2026	18-Oct-2026	Scheduled	
11	KEF-01	Commercial Kitchen Exhaust Systems	Roof	Restaurant kitchen	Example Make	KX-500	SN-1370	9,000 m³/h	-	10-Nov-2023	In Service	M	21-Aug-2026	20-Sep-2026	Overdue	
12	VRF-OU-01	VRF / VRV Multi-Split Systems	Roof	Retail podium	Example Make	VRF-24HP	SN-1407	68 kW	R-410A	10-Dec-2024	In Service	Q	22-Jul-2026	21-Oct-2026	Scheduled	
13	CRAC-01	Precision AC / CRAC & CRAH Units (Data Centres)	Level 3 - Server Room	Data room	Example Make	PX-35	SN-1444	35 kW	R-410A	10-Jan-2021	In Service	M	22-Sep-2026	22-Oct-2026	Scheduled	
14	BMS-01	BMS / Controls & Thermostats	Level G - Security	Building-wide	Example Make	BMS Server	SN-1481	-	-	10-Feb-2022	In Service	M	05-Sep-2026	05-Oct-2026	Due in 14 days	
15																
16																

DEFECT & CORRECTIVE ACTION LOG

Sample Facility Services Co. | Log every Not OK item. Days Open calculates automatically. Row 5 is an example.

No.	Date Found	Equipment Tag	Equipment Type	Defect Description	Priority	Recommended Action	Assigned To	Target Date	Est. Cost	Status	Closed Date	Days Open
1	28-Sep-2026	AHU-R-01	Air Handling Units (AHU)	Supply fan belt glazed and cracked	P2 - High	Replace matched belt set; re-tension per OEM	J. Perera	01-Oct-2026	85	Closed	29-Sep-2026	1
2	28-Sep-2026	AHU-R-01	Air Handling Units (AHU)	Biological growth in cooling coil drain pan	P3 - Medium	Clean, disinfect, add biocide tablets	J. Perera	05-Oct-2026	20	Closed	28-Sep-2026	0
3	21-Sep-2026	CH-02	Water-Cooled Chillers (Screw / Centrifugal)	Condenser approach 3.1 K - tube fouling suspected	P2 - High	Schedule condenser tube brush cleaning	Chiller Contractor	05-Oct-2026	1,200	In Progress		9
4	25-Sep-2026	CT-01	Cooling Towers (Open & Closed Circuit)	Dip-slide TBC 10^5 cfu/mL	P1 - Critical	Shock-dose biocide; re-sample in 48 h; review dosing	Water Treatment Co.	27-Sep-2026	350	Open		5
5	15-Sep-2026	Split AC	Split, Cassette & Ducted Split AC Units	Condensate drain line blocked - ceiling stain Level 4	P3 - Medium	Flush drain; repair ceiling tile	M. Silva	20-Sep-2026	60	Closed	18-Sep-2026	3
6	10-Sep-2026	CRAC-01	Precision AC / CRAC & CRAH Units (Data Centres)	Humidifier canister expended	P2 - High	Replace humidifier canister	M. Silva	13-Sep-2026	240	Closed	12-Sep-2026	2
7	26-Sep-2026	SPF-01	Stair Pressurization & Smoke Extract Systems	Stair ΔP 9 Pa at Level 20 (below 12.5 Pa)	P1 - Critical	Check relief damper setting / VFD pressure setpoint; retest	Controls Contractor	29-Sep-2026	0	Open		4
8												
9												
10												
11												