

HVAC Maintenance Photo Checklist

HVAC maintenance visits cover equipment that homeowners and property managers rarely see and cannot evaluate themselves. Filter conditions, refrigerant readings, heat exchanger cracks, and electrical connections are all invisible once the unit is closed back up. When a system fails between visits, a warranty claim is disputed, or a client questions what was serviced, the question is always the same: **can you prove the equipment condition before you touched it, what you found, and what you did?** This guide gives your technicians the exact shots to capture on every maintenance call.

THE 7 PHASES

Document Every Phase, Protect Every Job

01 PHASE Pre-Service Site Assessment

- Unit location — exterior & interior
- Thermostat settings before any changes
- Existing damage or corrosion noted
- Equipment nameplate — model & serial
- Client-reported issues documented
- Refrigerant type labeled on unit
- System age & last service date noted
- Permit or service history on-site
- Electrical disconnect location confirmed

02 PHASE Air Handler & Indoor Unit

- Air handler — wide shot before service
- Evaporator coil condition — clean or dirty
- Condensate drain line — clear or clogged
- Filter condition before replacement
- Evaporator coil after cleaning
- Blower wheel condition — dust buildup
- Filter size & MERV rating labeled
- Condensate drain pan — standing water noted
- Cabinet & access panel condition

03 PHASE Condenser & Outdoor Unit

- Condenser — wide shot before service
- Condenser fan blade condition
- Electrical disconnect condition
- Condenser coil condition — debris noted
- Condenser fan motor — condition noted
- Pad level & unit clearances
- Condenser coil after cleaning
- Refrigerant line insulation condition
- Condenser — wide shot after service



04 PHASE Refrigerant & Electrical Systems

- | | | |
|--|--|---|
| <input type="checkbox"/> Manifold gauge set — readings in frame | <input type="checkbox"/> Suction pressure documented | <input type="checkbox"/> Discharge pressure documented |
| <input type="checkbox"/> Superheat or subcooling measurement | <input type="checkbox"/> Refrigerant added — weight in frame | <input type="checkbox"/> Electrical panel at unit — condition |
| <input type="checkbox"/> Capacitor — microfarad reading in frame | <input type="checkbox"/> Contactor condition — pitting noted | <input type="checkbox"/> Disconnect fuse size & condition |

05 PHASE Ductwork & Ventilation

- | | | |
|---|--|---|
| <input type="checkbox"/> Supply plenum condition | <input type="checkbox"/> Return air plenum condition | <input type="checkbox"/> Visible duct connections — leaks noted |
| <input type="checkbox"/> Duct insulation condition | <input type="checkbox"/> Supply registers — quantity & condition | <input type="checkbox"/> Return grille — size & condition |
| <input type="checkbox"/> Static pressure reading (if taken) | <input type="checkbox"/> Fresh air intake condition | <input type="checkbox"/> Attic or crawlspace duct condition |

06 PHASE Heat Source — Furnace or Heat Pump

- | | | |
|--|--|---|
| <input type="checkbox"/> Furnace — wide shot before service | <input type="checkbox"/> Heat exchanger — crack inspection photo | <input type="checkbox"/> Burner condition — flame color noted |
| <input type="checkbox"/> Igniter condition — cracked or intact | <input type="checkbox"/> Flue pipe condition & connections | <input type="checkbox"/> Gas pressure reading (if measured) |
| <input type="checkbox"/> Heat pump — defrost cycle confirmed | <input type="checkbox"/> Auxiliary heat strips — condition | <input type="checkbox"/> Carbon monoxide reading if taken |

07 PHASE Final Testing & Closeout

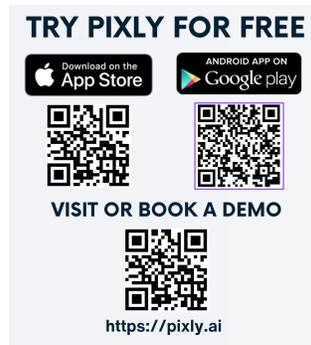
- | | | |
|--|--|--|
| <input type="checkbox"/> System operating in cooling mode | <input type="checkbox"/> System operating in heating mode | <input type="checkbox"/> Supply air temperature — thermometer in frame |
| <input type="checkbox"/> Return air temperature — thermometer in frame | <input type="checkbox"/> Temperature split — delta T documented | <input type="checkbox"/> Thermostat final settings confirmed |
| <input type="checkbox"/> All access panels reinstalled | <input type="checkbox"/> Client walkthrough — findings explained | <input type="checkbox"/> Service report & findings documented |

HOW TO USE THIS IN THE FIELD**Turn This Checklist Into Your Daily Workflow**

- 01 Photograph the Filter Before You Pull It**
A photo of the dirty filter still in the rack — before you remove it — is your proof of what condition it was in when you arrived. Filter neglect is one of the most common causes of system failure, and this single shot protects you when a client disputes the source of a coil freeze or blower failure.
- 02 Capture Gauge Readings with the Display Clearly Visible**
Manifold gauge pressures, capacitor microfarad readings, and temperature split measurements must be legible in the photo. A blurry gauge shot proves nothing. Hold the gauge steady, get close, and confirm the numbers are readable before moving on.
- 03 Document Every Abnormal Finding Before Correcting It**
A cracked heat exchanger, a pitted contactor, standing water in the drain pan, or a failed capacitor must be photographed before any corrective work begins. These shots are your evidence for the repair recommendation and your liability protection if a client later claims the damage was caused by your visit.
- 04 Wide Shot of the Unit Before and After Every Visit**
A before-and-after pair of the full indoor and outdoor unit — taken from the same position at the start and end of every visit — documents the condition you inherited and the condition you left it in. These are the images that resolve every he-said she-said dispute about pre-existing equipment damage.

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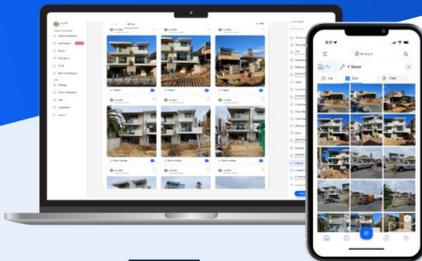
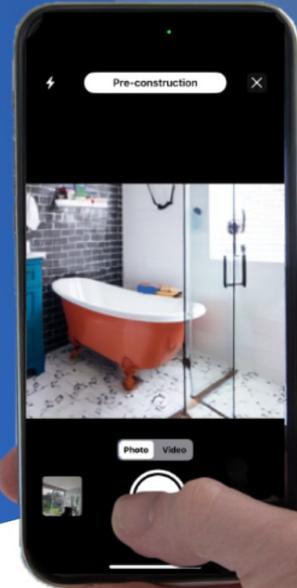
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