

HVAC SYSTEM ASSESSMENT CHECKLIST

A Practical Guide for Evaluating HVAC System
Condition and Performance



PROPERTY NAME: _____ DATE: _____ INSPECTOR: _____



SYSTEM OVERVIEW

Evaluate the overall condition, functionality, and estimated remaining useful life of the HVAC systems based on a visual assessment and available information.

Building Use / Type: _____

Year Built: _____

Total Building SF: _____

Number of HVAC Systems: _____

Type of Systems:

- ☐ Rooftop Units ☐ Split Systems ☐ Chillers
☐ Boilers ☐ VRF / VRV ☐ Other _____



ACCESS & OBSERVATIONS

- ☐ Adequate access to equipment
☐ Equipment labels / data plates visible
☐ Previous maintenance records available
☐ Unusual noises noted
☐ Evidence of leaks or water intrusion
☐ Excessive vibration observed

NOTES: _____



MAINTENANCE & DOCUMENTATION

- ☐ Regular maintenance is performed
☐ Filters are being changed regularly
☐ Coils are clean
☐ Belts and bearings are in good condition
☐ Building automation system (BAS) functional
☐ No open service issues noted

NOTES: _____



SYSTEM COMPONENTS CHECKLIST

Check the observed condition of each major HVAC system component.

COMPONENT	CONDITION			
	Good	Fair	Poor	N/A
Air Handling Units	☐	☐	☐	☐
Rooftop Units	☐	☐	☐	☐
Condensing Units	☐	☐	☐	☐
Chillers	☐	☐	☐	☐
Boilers	☐	☐	☐	☐
Cooling Towers	☐	☐	☐	☐
Pumps	☐	☐	☐	☐
Fans / Blowers	☐	☐	☐	☐
Ductwork	☐	☐	☐	☐
Insulation	☐	☐	☐	☐
Thermostats / Controls	☐	☐	☐	☐
Air Distribution Devices	☐	☐	☐	☐
Filters	☐	☐	☐	☐
Refrigerant Piping	☐	☐	☐	☐
Electrical Connections	☐	☐	☐	☐



SYSTEM PERFORMANCE

- ☐ System is cooling effectively
☐ System is heating effectively
☐ Airflow appears adequate
☐ Temperature control is stable
☐ Humidity control is acceptable
☐ Uneven comfort areas noted

NOTES: _____



ENERGY EFFICIENCY INDICATORS

- ☐ Equipment appears energy efficient
☐ Insulation is in good condition
☐ Ductwork appears sealed
☐ Controls are optimized
☐ Equipment cycles appropriately
☐ Opportunities for improvement noted

NOTES: _____



CONDITION RATING GUIDE

Rate each system based on the overall observed condition and remaining useful life.

CONDITION RATING	DESCRIPTION	ESTIMATED REMAINING USEFUL LIFE
1 - EXCELLENT	New or like-new condition. No issues observed.	15 + Years
2 - GOOD	Well-maintained with normal wear.	10 - 15 Years
3 - FAIR	Moderate wear. Some components nearing end of service life.	5 - 10 Years
4 - POOR	Significant wear. Frequent repairs needed.	2 - 5 Years
5 - CRITICAL	System at or beyond end of useful life. Replacement recommended.	0 - 2 Years



HVAC SYSTEM SUMMARY

Provide an overall condition rating and summary for each HVAC system.

SYSTEM / EQUIPMENT	TYPE / LOCATION	MANUFACTURER MODEL	CONDITION RATING (1 - 5)	ESTIMATED REMAINING USEFUL LIFE	COMMENTS / OBSERVATIONS



IMMEDIATE CONCERNS

List any critical issues that require immediate attention.

- ☐ _____
☐ _____
☐ _____
☐ _____



RECOMMENDED ACTIONS

Summarize recommended repairs, replacements, or further evaluations.

- ☐ _____
☐ _____
☐ _____
☐ _____



CAPITAL PLANNING NOTES

Considerations for future planning and budgeting.



NEXT STEPS

- ☐ Obtain detailed system reports if needed
☐ Review maintenance plan
☐ Budget for repairs or replacements
☐ Schedule follow-up assessment

NOTES: _____



ASSESSMENT SUMMARY

Overall HVAC System Condition Rating:

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Overall Comments: _____

Inspector Name: _____

Company: _____

Date: _____

Signature: _____



Proactive HVAC evaluations help reduce operating costs,
extend system life, and prevent unexpected downtime.

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