General Maintenance Plan for Furnace & AC

Service	Furnace Maintenance	AC Maintenance	Frequency
1. Inspect Air Filters	Inspect and replace filters if needed	Inspect and replace filters if needed	Every 3–6 months
2. Clean Coils and Blower	Clean burner, heat exchanger, and blower assembly	Clean evaporator and condenser coils	Annually
3. Check Thermostat	Test thermostat for proper calibration and function	Test thermostat for proper calibration and function	Annually
4. Inspect Ductwork	Inspect for leaks, damage, or blockages	Inspect for leaks, damage, or blockages	Annually
5. Check System Controls	Test ignition system, limit switch, and safety controls	Check compressor, fan, and start cycle	Annually
6. Lubricate Moving Parts	Lubricate motor bearings, blower fan, and other moving parts	Lubricate fan and condenser motor	Annually
7. Inspect Flue and Venting	Inspect flue pipes and venting for blockages or leaks	N/A	Annually
8. Test Airflow	Check airflow and adjust if necessary	Check airflow and adjust if necessary	Annually
9. Check Refrigerant Levels	N/A	Check refrigerant levels and recharge if necessary	Annually
10. Inspect Insulation	Inspect insulation around furnace and ducts	Inspect insulation around refrigerant lines	Annually
11. Clean Condensate Drain	N/A	Clean and clear condensate drain	Annually

12. Check for Carbon Monoxide	Test for carbon monoxide levels around the furnace	N/A	Annually
13. Test Safety Features	Test emergency shutoff, pressure switches, and safety sensors	Test safety features (e.g., high-pressure switch)	Annually
14. System Startup Test	Test the entire heating system for proper operation	Test the entire cooling system for proper operation	Annually (Fall/Spring)
15. Check Electrical Connections	Inspect and tighten electrical connections	Inspect and tighten electrical connections	Annually
16. Verify System Efficiency	Check efficiency and recommend upgrades if necessary	Check efficiency and recommend upgrades if necessary	Every 2-3 years

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Optional Add-Ons (Add as needed)

Service	Furnace Maintenance	AC Maintenance	Frequency
16. Indoor Air Quality Inspection	Inspect for air quality issues (e.g., mold, dust)	Inspect for air quality issues (e.g., mold, dust)	Every 6 months
17. Smart Thermostat Installation	Install or upgrade to a smart thermostat	Install or upgrade to a smart thermostat	One-time or as needed
18. Humidifier Maintenance	Clean and inspect humidifier (if applicable)	N/A	Annually
19. UV Light Maintenance	Clean and inspect UV light systems (if applicable)	N/A	Annually

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Seasonal Reminders:

- **Fall (Furnace)**: Focus on heating system checkup, inspect air filters, clean burners, and check heat exchangers.
- **Spring (AC)**: Focus on cooling system checkup, clean condenser coils, check refrigerant levels, and inspect airflow.

Why Regular Maintenance?

- **Increased Efficiency**: Systems operate more effectively, saving on energy costs.
- **Extended Lifespan**: Proper maintenance helps prevent wear and tear, prolonging the life of your furnace and AC.
- **Safety**: Ensures that safety features are operational and prevents dangerous malfunctions (e.g., carbon monoxide leaks, electrical issues).
- **Better Air Quality**: Regular cleaning and maintenance can improve indoor air quality by ensuring filters and air ducts are clean.
