HVAC PROS — GUIDE

How often should you service an HVAC system?

Plan seasonal heating and cooling service. Know what to ask a contractor to inspect.

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Book cooling service before hot weather and heating service before cold weather. ENERGY STAR, Maintenance Checklist, fetched 2026-11-10 recommends spring checks for cooling and fall checks for heating. Its heating and cooling guidance, fetched 2026-11-10, recommends a yearly tune-up.

Put the equipment on a service record

Write down the indoor and outdoor unit model numbers. Keep the installation date, filter specification and previous service reports together. Tell the contractor about weak airflow, unusual sounds, uneven room temperatures and changes in energy use. Ask which equipment the visit covers. A furnace and a separate air conditioner may need different work.

For a business, name the person who can approve repairs. Give the contractor access instructions for plant rooms and roofs. Confirm the service window before the appointment.

What should a seasonal visit cover?

The ENERGY STAR checklist above includes thermostat settings, electrical connections, motor voltage and current, moving parts, the condensate drain and system controls. For cooling, it adds coil cleaning, refrigerant charge and blower checks. For heating, it includes fuel connections, pressure, combustion and the heat exchanger. Ask the contractor to record what was checked and any defects found. These are tasks to discuss with a professional, not instructions to open equipment yourself.

Ask for a separate written repair quote if the inspection finds a fault. A service visit should leave you with a record, not just a payment receipt. Keep readings and recommendations so the next contractor can see the history.

Filters between visits

ENERGY STAR's heating and cooling guidance, linked above, says to check the filter every month and change it at least every three months. It also says to replace a dirty filter sooner. Check your equipment manual for the correct filter and any different instructions. Do not treat this general schedule as permission to fit a filter that restricts airflow.

Plan or individual visit?

Compare the written scope. Ask whether a plan covers both heating and cooling, how visits are booked, and what happens if you miss one. Ask whether parts, diagnostic fees or emergency

attendance cost extra. Keep a renewal reminder with your service record.

This schedule is general guidance. Ask the contractor to adapt it to the equipment, operating hours and manufacturer's instructions. A maintenance appointment does not establish that a damaged system is safe to keep running.

Frequently asked questions

Does a maintenance plan include repairs?

Read the agreement. Ask for a separate list of included work, repair charges and exclusions.

Should I wait for the system to stop working?

Plan service before the heating or cooling season. Report new faults to the contractor when they occur.