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**Cooling Tower Task - CTU**  
**Master Task List - Annual Service**

Site: \_\_\_\_\_ Date: \_\_\_\_\_

Manufacture: \_\_\_\_\_ Equip. Tag #: \_\_\_\_\_

Model #: \_\_\_\_\_ Serial #: \_\_\_\_\_

Serviced by: \_\_\_\_\_ Date Serviced: \_\_\_\_\_

<u>Tasking Details</u>				
Detail #		OK	N/A	Deficient
1	Make sure all equipment is operating & safety systems are in place			
2	Physically clean all screens of all debris			
3	Operate make up water float for proper operation			
4	Check motor and fan for excessive vibration			
5	Check for loose or leaking water connections			
6	Check water for proper chemical levels			
7	Check motor supports and fan blades for excessive wear			
8	Check motor alignment and coupling			
9	Inspect drift eliminators for proper positioning and scale build-up			
10	Check gear reducer box oil and change annually, check oil level			
11	Check bearings for proper lubrication per manufacturers specs			
12	Check blade pitch and record pitch Pitch angle _____			
13	Check gear box backlash and record. Backlash _____			
14	Inspect and clean all water distribution nozzles			
15	Inspect fan blades for cracks and clean as needed			
16	Clean out debris from the basin			
17	Power wash fill and use scale remover as needed			
18	Check for corrosion and rust			
19	Check sump heater for proper operation			
20	Check / inspect heat transfer fill for obstructions and damage			
21	Check / exercise all isolation vales			
22	Megohmmeter the fan motor checking for insulation failure			







**Chiller Tasks - CHL**  
**Master Task List - Annual Service**

Site: \_\_\_\_\_ Date: \_\_\_\_\_

Manufacture: \_\_\_\_\_ Equip. Tag #: \_\_\_\_\_

Model #: \_\_\_\_\_ Serial #: \_\_\_\_\_

Serviced by: \_\_\_\_\_ Date Serviced: \_\_\_\_\_

<u>Tasking Details</u>				
Detail #		OK	N/A	Deficient
	<b>Annual Inspection</b>			
1	Check all condenser fans for proper operations			
2	Check all fan blades for abnormal wear			
3	Check for refrigerant/oil leaks thru out the chiller			
4	Check compressor operation and oil level			
5	Lubricate field serviceable bearings			
6	Perform spectroscopic oil analysis on all compressors and provide test results within 30 days of completing the PM			
7	Check all controls, including contactors, fuses, VFD's etc. for proper operation			
8	Check and record superheat and sub cooling readings			
9	Check the Crankcase heater for proper operation			
10	Run Chiller thru a quick test			
11	Run each compressor and verify operation			
12	Check refrigerant level			
13	Tighten all terminals and electrical connections			
14	List any failure codes and check with customer for repairs			
15	Check for excessive vibration or noise			
16	ensure pipe insulation is intact			
17	Check and clean chiller coils			









**Main Boiler Tasks - BLR**  
**Master Task List - Annual Service**

Site: \_\_\_\_\_ Date: \_\_\_\_\_

Manufacture: \_\_\_\_\_ Equip. Tag #: \_\_\_\_\_

Model #: \_\_\_\_\_ Serial #: \_\_\_\_\_

Serviced by: \_\_\_\_\_ Date Serviced: \_\_\_\_\_

<u>Tasking Details</u>				
Detail #		OK	N/A	Deficient
	<b>Annual Inspection</b>			
1	Perform a combustion analysis and make any adjustments needed			
2	Check and record gas pressure on incoming and outgoing gas valve			
3	Check and record return and supply water temps			
4	Check for fuel, water or gas leaks			
5	Look through the boiler's sight port in the furnace and observe the flame for any evidence of impingement and possible sooting			
6	Check expansion tank for proper pressure, drain if needed and add air			
7	Take water samples and compare them to the recommendation			
8	Check and test the low water cutoff			
9	Check operation of circulation pump on boiler			
10	Check indicating lights and alarms to make sure they are functioning properly			
11	Check for abnormal wear, noise or vibration			
12	Check and test all safety controls on the boiler			
13	Inspect ignitor and replace if necessary			
14	Check the free movement of the air damper device			
15	Inspect all wiring for cracks and all electrical connections			
16	Open and inspect the access doors to expose the fireside of boiler			
17	Thoroughly clean the tubes and tube sheets			
18	Inspect the insulation and look for any degradation			
19	Check the refractory			
20	Look for evidence of oxygen corrosion			
21	Check and test relief valve			





























## Hydronic Heat Pump Tasks - HPU Master Task List - Annual Service

Site: \_\_\_\_\_ Date: \_\_\_\_\_

Manufacture: \_\_\_\_\_ Equip. Tag #: \_\_\_\_\_

Model #: \_\_\_\_\_ Serial #: \_\_\_\_\_

Serviced by: \_\_\_\_\_ Date Serviced: \_\_\_\_\_

<u>Tasking Details</u>				
Detail #		OK	N/A	Deficient
1	Check blower belts and pulleys adjust as needed			
2	Check air filter and change			
3	Check for vibrations and noises			
4	Lubricate all points that are serviceable			
5	Add condensate pan treatment to drain pans			
6	Check and clean condensate drain line			
7	Tighten all electrical connections			
8	Check contactor for burnt contacts			
9	Check wiring for deterioration			
10	Check and ensure all access covers are in place and secure			
11	Check and clean blower wheel as needed			
12	Check water lines for signs of leaks			
13	Check operation of electronic shutoff valve			
14	Clean strainer in water line			
15	Record water entering temperature : _____			
16	Record water exiting temperature : _____			
17	Record blower start amps : _____			
18	Record blower running amps : _____			
19	Record compressor start amps : _____			
20	Record compressor running amps : _____			
21	Check for refrigerant leaks			
22	Check for oil leaking in unit			
23	Record return air temperature : _____			
24	Record supply air temperature under load : _____			
25	Check fins in coils for bent areas and straighten as needed			
26	Check operation of reversing valve			
27	Check operation of make up air actuator			



