



Understanding a Quality HVAC PM Visit

A training and reference guide for commercial building engineers, facility managers, and property teams.

This document helps facility teams understand what a professional HVAC Preventive Maintenance (PM) visit should include, how to recognize quality service, and how to prepare for effective collaboration with your service provider.

1. Why Preventive Maintenance Matters

Preventive Maintenance protects your property's investment by ensuring HVAC systems operate efficiently and reliably. Proper PM reduces emergency breakdowns, improves comfort, and extends equipment life — all while keeping utility costs predictable.

A consistent PM program is not an expense — it's a proactive strategy that avoids costly repairs and unplanned downtime.

2. What a Quality PM Visit Should Include

A high-quality PM visit includes a complete inspection, cleaning, and performance verification of each system. Below are key elements your HVAC provider should complete during each visit:

- Airflow and filtration inspection (filter replacement, coil inspection)
- Electrical and control testing (connections, capacitors, contactors)
- Drain and condensate system cleaning and verification
- Belt, bearing, and lubrication inspection
- Refrigerant pressure and temperature readings
- Thermostat and control calibration
- Visual inspection of cabinet, panels, and seals
- Final performance verification with readings documented

3. Signs of a Thorough, Professional PM

You can identify a quality PM visit by the professionalism and thoroughness of the technician and the condition of the work area after completion.

- The technician reviews findings before leaving
- Work areas are left clean and panels reinstalled
- Photos and data are included in the report
- Recommendations are clearly explained
- Digital summary is organized and consistent
- The same standards are followed across all your properties

4. Your Facility Team's Role in PM Success

Effective PM is a partnership between your in-house staff and your HVAC provider. Here's how your facility team can help ensure successful maintenance visits:

- Ensure roof and equipment room access is available
- Notify tenants or security of technician presence
- Report comfort or control issues before visits
- Keep equipment areas clear for technician access
- Avoid adjusting thermostats during testing

5. PM Visit Review Checklist for Building Engineers

✓	All filters replaced and labeled with date
✓	Drain pans and lines cleared; no standing water
✓	Coils cleaned and visibly inspected
✓	Panels secured and area left clean
✓	Readings and photos included in service report
✓	Technician discussed any follow-up items
✓	Performance readings appear reasonable and consistent

6. Common Pitfalls to Watch For

Be aware of signs that indicate substandard maintenance work:

- Technician on site for only a few minutes per unit
- Reports lack temperature or pressure readings
- Filters appear old or date labels inconsistent
- Same comfort complaints month after month
- Units left dirty or access panels unsecured

7. How the DaVinci Portal Supports Quality

All PM visits performed by DaVinci Mechanical are logged in our digital DaVinci Portal. This system tracks readings, photos, notes, and historical performance for every unit across your property. Facility teams can access reports to review findings, track repairs, and forecast maintenance budgets.

Benefits include:

- Transparent performance tracking
- Historical data for every unit
- Consistent documentation across all visits
- Predictive maintenance insights

8. PM as a Partnership

A strong PM program depends on coordination between your facilities team and your HVAC partner. By maintaining clear communication and using shared quality standards, your property benefits from consistent comfort, lower costs, and fewer service emergencies.

Contact & Reference

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Consistent quality starts with informed teams. Share this guide with all building staff and facility partners.