When Should You Place a Service Call?

A technical training guide for building engineers, facility managers, and maintenance personnel.

This guide outlines how to distinguish between issues that require immediate service response versus those that should be handled through preventive maintenance (PM) programs.

1. Purpose of This Guide

In commercial HVAC operations, clarity between maintenance and service responsibilities reduces unnecessary costs, minimizes downtime, and improves system reliability. This document helps teams make consistent decisions aligned with DaVinci Mechanical's quality and response standards.

2. Understanding Maintenance Issues

Maintenance issues are preventive or performance-related tasks scheduled during regular PM visits. These issues do not require immediate intervention but are essential for long-term equipment health.

Examples include:
• Filter replacements
• Belt wear inspections
• Coil cleaning
• Thermostat calibration
• Condensate drain clearing
• Minor vibration or noise checks

3. Defining a Service Call

A service call is reactive — initiated when a system or component is not performing as expected, impacting comfort, safety, or building operations. Service calls are unscheduled and require technician dispatch.

Common Service Call Situations:
• No heating or cooling in occupied areas
• Unit not starting or cycling repeatedly
• Water leaks or drain pan overflow
• Electrical odors, smoke, or tripped breakers
• Compressor or fan motor failure
• Control system or BAS alarms

4. The 3-Question Rule

Before placing a service call, ask the following:

1. Is this issue affecting comfort, safety, or critical equipment right now?
2. Can it wait until the next PM visit without disruption or risk?
3. Is it something the on-site team can safely inspect first?

If the answer to the first question is "yes," or the second question is "no," a service call should be placed immediately.

5. Before You Call Checklist

• Check for tripped breakers or disconnected power.
• Verify thermostat settings and batteries.
• Confirm filters and coils are clean.
• Inspect visible wiring or drain lines for issues.
• Document observed symptoms (noises, leaks, or odors).

6. What to Include When Reporting a Service Call

Providing clear details during dispatch helps technicians arrive prepared with the right tools and parts. Include:

• Unit ID, location, and type (RTU, split, freezer, boiler, etc.)
• Nature of the issue and any alarms or fault codes
• Environmental impact (temperature, leaks, equipment shutdown)
• Any actions already taken by building staff

7. Case Study: Common Misdiagnosis

During a recent commercial call, a unit reported as ‘not cooling’ was found to have restricted airflow from a clogged filter. Had the issue been identified during maintenance, the tenant would have avoided downtime and cost. Routine PM reduces preventable service events by over 60% across comparable sites.

8. Best Practices for Maintenance Teams

• Document every observed irregularity, even if not urgent.
• Photograph equipment before and after maintenance for trend analysis.
• Use standardized forms or digital checklists in the DaVinci Portal.
• Report repeated minor issues — they often signal developing failures.

9. Using the DaVinci Portal for Quality Tracking

The DaVinci Portal serves as the living record of every maintenance and service action performed. It enables historical tracking, predictive analytics, and quality audits across multiple sites. When used consistently, it becomes the cornerstone of predictable uptime and budget control.

Contact & Reference

For 24/7 commercial dispatch, contact our team directly:

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