

THE EXPERT GUIDE TO HVAC SERVICE AND MAINTENANCE PLANS AND WHY YOU MIGHT WANT ONE



Service and Maintenance Plans

Service and maintenance plans or memberships, sometimes called maintenance agreements or service plans, are agreements between you and your air conditioning contractor for scheduled inspections and maintenance of your heating, ventilation, and air conditioning (HVAC) system at a set fee.

Service and maintenance plans are generally scheduled for the spring and fall to check for safety, maintain peak efficiency, help keep utility bills lower, extend the life of your HVAC system, and lessen the chance of failures. Most plans offered by reputable heating and air conditioning companies cover an inspection of the entire HVAC system and routine maintenance—such as replacing or cleaning filters—as well as a tune-up.

This guide will help you better understand what a service and maintenance plan is all about and decide if it's the right thing for you.

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Comfort and Cost Savings

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Service and Maintenance Plans—The Big Picture

Take care of your HVAC system, and it will take care of you.

The cliché “out of sight, out of mind” is often the reason for neglected maintenance on your HVAC system. HVAC systems are usually installed where they aren’t seen, such as in a section of the basement, a closet, on rooftops, or in mechanical rooms, making them easy to ignore. The systems are simply taken for granted, until they fail. Decreased efficiency, utility overpayment, discomfort, loss of productivity, premature replacement, and higher repair costs are the result.

Getting your HVAC system checked twice annually is just as important as changing the oil in your car every 3,000 miles!

According to Energy Star (energystar.gov), as much as half of the energy used in your home goes to heating and cooling. So making smart decisions about your home’s heating, ventilating, and air conditioning (HVAC) system can have a big effect on your utility bills.

Comfort and Cost Savings

Why Would I Want a Service and Maintenance Plan?

Generally with a service and maintenance plan you will notice increased system lifespan, improved efficiency, lower utility bills and catch problems before they occur. What you help prevent are potential safety threats to your home and family. Also, some companies will offer priority service to service and maintenance agreement customers—putting you at the front of the line when you need it most

Top of Mind

The best way to make sure that you remember to perform necessary maintenance is to get a scheduled service and maintenance plan with a reputable local heating and air conditioning company. Your HVAC company will not only remind you when it is time for checkups—usually in the spring and fall—but will come do all the standard maintenance recommended to keep your system running safely, at its peak performance.

Read That Warranty

Consider your system. If it is new and still under a manufacturer’s warranty, you may decide that you don’t need a service and maintenance plan yet because any major repairs should be covered under the manufacturer’s warranty. However, read the warranty fine print—some manufacturers require routine maintenance as a term of the warranty.

Can’t I Just do it Myself?

First, determine whether it is possible to perform a standard HVAC checkup yourself. If you are trained and mechanically inclined, perhaps you can DIY, and do not need a plan with an HVAC company for the

maintenance. However, you will need to set aside plenty of time both spring and fall, put it on your calendar and, chances are, you probably don't have the time, tools and training that a professional technician would bring to the task, so it might become one of those things that you keep putting off.

Unsure if you are keeping up with your maintenance? [Take the "Is Your Heating System Ready for Thanksgiving?" quiz.](#)

Also, don't forget that most plans come with some other really important benefits—priority service, labor rate and parts discounts, etc. A service and maintenance plan can often pay for itself.

8 Reasons for Having a Service and Maintenance Plan

- 1 Increased System Lifespan:** Professional maintenance can maximize your system's lifespan. The longer your system operates efficiently, the longer you can delay the hassle and expense of purchasing and installing a new system.
- 2 Improved Efficiency:** Like most home HVAC systems, your system probably accounts for the lion's share of your home's total energy consumption. Having a professional regularly perform checkup is one of the best ways you can reduce your energy costs and save money.
- 3 Enhanced Function:** Above all else, an HVAC system should keep you comfortable. Signing up for a service and maintenance plan can help ensure that your system heats and cools your home safely, evenly and effectively. Regular maintenance is also a great way to catch problems before they occur.
- 4 No Chance of Injury:** One of the drawbacks of DIY HVAC maintenance is the risk of injury. Letting a professional handle your HVAC maintenance will completely eliminate your risk of injury and ensure a thorough system inspection.
- 5 Priority Service:** Though maintenance is important, it can't always prevent a malfunction from occurring. However, here's the good news: If you sign up for a service and maintenance plan with a reputable HVAC company, you will also receive priority customer service—putting you at the front of the line when you need it most—as well as advantageous discounts on parts and repair bills.
- 6 Peace of Mind:** You have a lot of things on your mind. Letting a professional take care of your HVAC maintenance is a great way to lift a burden from your shoulders, allowing you to focus on other things.
- 7 Savings:** A service and maintenance plan can pay for itself by giving you discounts on parts and labor, as well as lower utility bills through improved efficiencies.
- 8 Technician Excellence:** A truly professional heating and air conditioning company will have technicians that are factory trained and NATE certified—with expert skills matched only by their professionalism.

What Should I Expect and What Does it Cost?

What the Technician Should do Each Visit

- Check system functions, safety controls, and adjust the operating sequence where appropriate
- Inspect electrical components and connections and tighten as required
- Ensure proper airflow and change dirty air filters. Customer may provide their own filter or have the technician install a new one for an additional cost. Inspect pumps, lubricate and check flow rates where appropriate
- Clean and lubricate motors as required
- Examine belts, adjust and align as required
- Inspect, clean and balance blowers as required

Spring Visit (Preparation For Summer Season)

- Check inside coil, condensate pans, condensate traps, and condensate lines to prevent obstructions
- Visually inspect the coil
- Check refrigerant levels. (According to many equipment manufacturers, a 10% refrigerant loss will result in a 20% decrease in system efficiency!)

Fall Visit (Preparation For Winter Season)

- Clean the burner assembly
- Remove soot from fireside of burner
- Clean and check operation of humidifier, if covered under contract
- Inspect the heat exchanger for cracks
- Adjust air-to-fuel ratio of burner and perform combustion analysis
- Note: For heat pump applications, winter season inspections repeat a number of the summer procedures plus several additional checks. Maintaining semi-annual checkups for heat pumps is also important.

What Does a Service and Maintenance Plan Cost?

Each company will have its own specific checklist of services. Some companies have different levels (and therefore costs) of plans. An average service and maintenance plan can cost between \$175 and \$500 per year, depending on the number of services offered.

Sample Checklist for a Pre-winter Checkup

Questions To Ask Yourself Before You Buy

- Inspect Thermostat
- Inspect filter and replace if needed
- Check air flow and temperature rise
- Check pressure
- Inspect safety circuits
- Check electrical connections
- Inspect blower wheel
- Inspect blower motor
- Check blower capacitor
- Inspect flue
- Inspect heat exchanger
- Inspect inducer motor
- Check gas valve
- Check manifold pressure
- Inspect burners
- Inspect flame sensor and clean if needed
- Inspect hot surface igniter
- Check standing pilot /intermittent pilot
- Check carbon monoxide emission level or pass/fail
- Check defrost cycle and reversing valve operation (heat pumps only)
- Tighten screw lug terminals in condensing unit (heat pumps only)
- Check refrigerant level (heat pumps only)
- Check emergency heat systems for proper operation (heat pumps only)
- Check oil igniter (oil furnace only)
- Check electrodes (oil furnace only)
- Check strainer (oil furnace only)
- Inspect nozzle (oil furnace only)
- Inspect oil filter (oil furnace only)

Do You Have The Right HVAC Partner?

It's important to take the time to find a good HVAC professional. Make sure that the company is licensed and insured. Also, make sure that the technician who installs the system is certified by North American Technician Excellence (NATE). Other affiliations to look for are Quality One and Air Conditioning Contractors of America (ACCA). Additionally, a company that is a factory authorized dealer (FAD) of a reputable manufacturer such as Carrier® or similar, means that they have passed the manufacturer's standards in order to represent their equipment.

Consult a Professional

Your chosen professional HVAC advisor will help you work through the list of things that you can do routinely to maintain your system in between checkups.

Is your system so old that the checkups are no longer sufficient to keep you safe and comfortable?

To get a FREE estimate for a heating and cooling system replacement for your home, call 301-615-2755 or contact us via email at info@PresidentialHeat.com

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