

Fan Coil Maintenance Visit

A fan coil maintenance record covering unit identity, isolation, filters, coil and condensate observations, controls, service work and handover evidence.

1. Record details and scope

Project

Filled in from the project in SiteSurvey.

Site or premises address

Client or organisation

Record date *

Person completing the record *

This records authorised fan coil maintenance, not refrigeration circuit certification, electrical installation testing or proof of indoor air quality.

HSE guidance calls for safe maintenance by competent people, using suitable isolation and equipment information. Follow the installed unit instructions and site procedure when deciding service tasks.

2. Equipment and scope

Fan coil unit ID, model and location *

Scan the data plate

Scanned in the SiteSurvey app. On paper, write the numbers: serial number, model number, asset number.

Competent person and authorisation *

Manufacturer or approved procedure reference *

Work or inspection scope and exclusions *

3. Service preparation

Unit type and served zone *

Isolation and safe access verification *

Reported faults and previous work

Record the reported symptom, affected area and conditions under which it occurs. Separate the report from the technician's findings.

4. Service checks

Filter condition and replacement recorded * (choose one)

☐ Acceptable ☐ Action needed ☐ Not checked ☐ Not applicable

Action, limitation or reason not applicable * (if applicable)

Accessible coil and fan condition checked * (choose one)

☐ Acceptable ☐ Action needed ☐ Not checked ☐ Not applicable

Action, limitation or reason not applicable * (if applicable)

Condensate tray and drain checked under procedure * (choose one)

☐ Acceptable ☐ Action needed ☐ Not checked ☐ Not applicable

Action, limitation or reason not applicable * (if applicable)

Visible pipework, valves and insulation checked * (choose one)

☐ Acceptable ☐ Action needed ☐ Not checked ☐ Not applicable

Action, limitation or reason not applicable * (if applicable)

Controls and operation checked after safe restoration * (choose one)

☐ Acceptable ☐ Action needed ☐ Not checked ☐ Not applicable

Action, limitation or reason not applicable * (if applicable)

Cleaning, parts and adjustments recorded

Measurement (copy this block for each one)

Measurement point and parameter *

Actual result and unit *

Acceptance criterion and source *

Instrument and calibration reference

Comparison * (choose one)

☐ Within criterion ☐ Outside criterion ☐ Unable to assess

Exception and response * (if applicable)

5. Handover

Use decision * (choose one)

☐ Available within recorded limits ☐ Restricted use ☐ Out of service

Restrictions, isolation and person informed * (if applicable)

Repair or follow-up job reference

Condition and defect evidence (photos: attach, or note the file names)

6. Actions and review

Are further actions required? * (choose one)

☐ Yes ☐ No

Further action (copy this block for each one; if applicable)

Action and evidence reference *

Person responsible *

Target date

Action status * (choose one)

☐ Open ☐ In progress ☐ Completed

Completion evidence * (if applicable)

Outstanding limitations and information to pass on

Record status * (choose one)

☐ Ready for review ☐ Further work needed ☐ Work or use stopped

Reviewed by

Review date

Author signature *

Signing records the information entered. It does not itself certify legal compliance, remove a limitation or authorise unsafe work.