HVAC SERVICE AGREEMENT

Template for residential and commercial heating, ventilation, and air conditioning maintenance, service, and repair

PART 1 - COMPANY, CLIENT, AND PROPERTY INFORMATION

Company Name	_____	**Date**	____ / ____ / _____
Company Phone	_____	**Company Email**	_____
Contractor License #	_____	**Insurance Policy #**	_____
Client Name	_____	**Client Phone**	_____
Client Email	_____	**Billing Address**	_____
Service Property Address	_____	**City / State / ZIP**	_____
Property Type	☐ Residential ☐ Commercial ☐ Multi-unit ☐ Other: _____	**Approx. Square Footage**	_____
Start Date	____ / ____ / _____	**End Date / Renewal**	_____
Visit Frequency	☐ One-time ☐ Annual ☐ Twice a year (spring / fall) ☐ Quarterly ☐ Monthly	**Emergency Service**	☐ Included ☐ Extra charge ☐ Not offered
Payment Terms	☐ Due upon receipt ☐ Per visit ☐ Monthly ☐ Annual prepaid ☐ Other: _____	**Quoted Price**	$_____

PART 1B - EQUIPMENT COVERED

Instructions: List each unit covered by this agreement. Equipment not listed here is not covered unless added in writing.

Equipment	Covered	Not Covered	Make / Model / Serial / Location
Furnace / air handler	☐	☐	Make / model: _____ Serial: _____ Location / age: _____
Air conditioner (condenser)	☐	☐	Make / model: _____ Serial: _____ Location / age: _____
Heat pump	☐	☐	Make / model: _____ Serial: _____ Location / age: _____
Ductless mini-split (indoor + outdoor units)	☐	☐	Number of heads: ____ Make / model: _____
Rooftop unit (RTU)	☐	☐	Number of units: ____ Tonnage: ____ Make / model: _____
Boiler / hydronic system	☐	☐	Make / model: _____ Serial: _____ Location / age: _____
Thermostats / controls	☐	☐	Quantity: ____ Type: ☐ Standard ☐ Programmable ☐ Smart / BAS

PART 2 - SELECTED SCOPE OF WORK

Instructions: Check "Included" only for the services that are part of the agreement. Leave services blank or check "Not Included" if they are not part of the agreement. Add frequency, limits, or extra-charge notes in the right column.

A. Cooling System Maintenance

Seasonal maintenance of air conditioners, heat pumps (cooling mode), and mini-splits.

Service Item / Task	Included	Not Included	Notes / Frequency / Limits
Inspect and clean outdoor condenser coil	☐	☐	Rinse coil; straighten fins as needed.
Inspect indoor evaporator coil	☐	☐	Visual check where accessible. Deep coil cleaning: ☐ Included ☐ Extra charge
Check refrigerant pressures and temperature split	☐	☐	Refrigerant added is charged per pound unless noted: _____
Inspect and tighten electrical connections	☐	☐	Includes contactor and disconnect.
Test capacitors, motors, and compressor amperage	☐	☐	Readings recorded on the visit report.
Clear condensate drain line and test float / safety switch	☐	☐	Drain treatment: ☐ Included ☐ Extra charge
Check and calibrate thermostat operation	☐	☐	Battery replacement: ☐ Included ☐ Extra charge

B. Heating System Maintenance

Seasonal maintenance of furnaces, heat pumps (heating mode), and boilers.

Service Item / Task	Included	Not Included	Notes / Frequency / Limits
Inspect burners, ignition, and flame sensor	☐	☐	Clean flame sensor as needed.
Inspect heat exchanger for cracks or corrosion	☐	☐	Visual inspection where accessible.
Test safety controls and limit switches	☐	☐	Includes rollout and high-limit switches.
Check gas pressure and combustion	☐	☐	Gas units only.
Inspect flue / venting and test for carbon monoxide	☐	☐	CO readings recorded on the visit report.
Test heat pump defrost cycle and auxiliary heat	☐	☐	Heat pumps only.
Inspect blower motor, wheel, and belt	☐	☐	Belt replacement: ☐ Included ☐ Extra charge

C. Air Filters and Indoor Air Quality

Filters and air-quality accessories.

Service Item / Task	Included	Not Included	Notes / Frequency / Limits
Replace standard air filters at each visit	☐	☐	Filter size(s): _____ Quantity: ____
Replace high-efficiency / media filters	☐	☐	☐ Included ☐ Extra charge Notes: _____
Service UV lights / air purifiers	☐	☐	☐ Included ☐ Extra charge Notes: _____

Service humidifier / dehumidifier	☐	☐	Pad / filter replacement: ☐ Included ☐ Extra charge
Check fresh-air / ventilation equipment (ERV / HRV)	☐	☐	Where installed.

D. Ductwork and Airflow

Airflow checks on accessible ductwork.

Service Item / Task	Included	Not Included	Notes / Frequency / Limits
Visual inspection of accessible ductwork	☐	☐	Attic, crawlspace, and basement areas only if safe to access.
Check airflow and static pressure	☐	☐	Results recorded on the visit report.
Seal minor leaks at accessible duct joints	☐	☐	Limits: _____
Duct cleaning	☐	☐	☐ Separate estimate Notes: _____
Register / grille cleaning	☐	☐	☐ Included ☐ Extra charge

E. Repairs, Diagnostics, and Priority Service

Benefits for clients under this agreement.

Service Item / Task	Included	Not Included	Notes / Frequency / Limits
Priority scheduling for repair calls	☐	☐	Response target: _____ (business hours)
Diagnostic fee	☐	☐	☐ Waived ☐ Discounted to $_____ ☐ Standard rate
Discount on repair parts and labor	☐	☐	Discount: _____ %
After-hours / emergency service	☐	☐	☐ Included ☐ Extra charge Rate: $_____ / hour
Written estimate before any repair	☐	☐	Repairs over $_____ require client approval first.

F. Commercial Add-ons

For commercial properties and rooftop units.

Service Item / Task	Included	Not Included	Notes / Frequency / Limits
Rooftop unit (RTU) filter and belt service	☐	☐	Frequency: _____
Economizer inspection and adjustment	☐	☐	Where installed.
Building automation / controls check	☐	☐	Schedules, setpoints, and sensors.
Written maintenance log for each visit	☐	☐	For the property manager / compliance records.
Coordination with property management and tenants	☐	☐	Contact: _____

G. Optional Installation and Replacement

New equipment or system replacement is quoted separately.

Service Item / Task	Included	Not Included	Notes / Frequency / Limits
Equipment replacement or new installation	☐	☐	☐ Separate estimate

Thermostat upgrade / smart thermostat installation	☐	☐	☐ Separate estimate
Ductwork modification or new duct runs	☐	☐	☐ Separate estimate

PART 2B - EXCLUSIONS AND SPECIAL NOTES

Unless specifically selected above or approved in writing, this agreement does not include: refrigerant beyond the amount noted, replacement of major components (compressors, coils, heat exchangers), ductwork replacement, electrical or plumbing work beyond the HVAC equipment, permit fees, code-required upgrades, asbestos or mold testing or removal, cranes or lifts for rooftop access, equipment that is unsafe or not accessible, or damage caused by power surges, flooding, fire, freezing, pests, misuse, or acts of nature.

Special notes: _____

PART 3 - GENERAL TERMS AND CONDITIONS

Agreement Term and Renewal: This agreement begins on the start date listed above and continues until the end date listed above. If renewal is selected, it renews for the same term unless either party gives written notice as described under Cancellation.

Scheduling: The Contractor will contact the Client to schedule maintenance visits, normally in spring for cooling and in fall for heating. Weather, parts availability, and emergency calls may change the schedule; the Contractor will notify the Client of any change.

Access and Safety: The Client must provide safe access to all equipment, including attics, crawlspaces, mechanical rooms, and rooftops, and must secure pets. If equipment cannot be reached safely, that item may be skipped or rescheduled, and a trip charge may apply.

Client Responsibilities: Between visits, the Client is responsible for changing filters (unless filter service is included), keeping outdoor units clear of plants and debris, keeping return vents unblocked, and reporting unusual noises, smells, leaks, or performance problems promptly.

Refrigerant Handling: Refrigerant work is performed only by EPA Section 608 certified technicians and in compliance with federal and state rules. Refrigerant added is charged per pound unless stated otherwise. Some older refrigerants (such as R-22) are limited or no longer produced, which may affect repair cost and options.

Diagnostics and Repair Approval: Maintenance visits include inspection only. Any repair or part replacement will be explained to the Client first, with a written estimate when the cost is over the approval amount listed in Part 2, section E. No repair over that amount is performed without the Client's approval.

Existing Conditions and Older Equipment: Maintenance does not guarantee that equipment will not fail. Older equipment, equipment past its expected life, or equipment with existing defects may need repairs or replacement. The Contractor will report any condition found that may be unsafe, including possible carbon monoxide hazards, and may shut down unsafe equipment.

Warranties: Manufacturer warranties on equipment and parts are governed by the manufacturer. The Contractor's labor on repairs is warranted for _____ days unless otherwise stated in writing. Maintenance under this agreement does not void or replace any manufacturer warranty, and the Client is responsible for registering equipment with the manufacturer when required.

Permits and Codes: Work that requires a permit will be quoted with the permit included or listed as a separate fee. Code-required upgrades discovered during service are not included unless approved in writing.

Emergency Service: If emergency or after-hours service is selected, the Contractor will make reasonable efforts to respond within the target listed above. Response times are goals, not guarantees, and may be affected by weather, call volume, and safety conditions.

Payment: Payment is due according to the payment terms listed above. Late balances may result in paused service, loss of priority status, and discounts until the account is brought current. Returned payments may be subject to a fee.

Price Changes: The Contractor may adjust pricing at renewal for changes in labor, parts, refrigerant, fuel, or scope, with written notice to the Client before the new term begins.

Cancellation: Either party may cancel this agreement by giving written notice at least 30 days before the desired cancellation date. Any services already performed, and any discounts received based on the full term, may be billed at the standard rate.

Damage Reporting: Any concern or damage claim should be reported in writing within 48 hours of the service visit so it can be reviewed while conditions are still visible.

Limitation of Liability: The Contractor is not responsible for losses caused by equipment failure that was not the result of the Contractor's work, including food spoilage, lost business, or temporary loss of heating or cooling, except as required by law.

Licenses, Insurance, and Compliance: The Contractor is responsible for maintaining any required business licenses, contractor or mechanical / HVAC licenses, and insurance for the work performed under this agreement.

No Legal Advice: This template is provided as a general business form and is not legal advice. Each business should have the document reviewed by a qualified attorney in its state before use.

Entire Agreement: This document, including any written attachments or approved estimates, represents the entire agreement between the parties for the services described. Changes must be made in writing and approved by both parties.

PART 4 - SIGNATURES

By signing below, both parties agree to the selected services, equipment covered, pricing, payment terms, and general terms listed in this agreement.

Client Signature	**Contractor / Company Representative Signature**
_____	_____
Printed Name	Printed Name
_____	_____
Date	Date
_____	_____
Additional Notes	Additional Notes
_____	_____