

OWNER FIELD GUIDE

Seasonal Home Systems Checklist

A twice-a-year and quarterly walk-through for older houses, rural properties, and North Texas weather.

Written for homeowners who do their own work — or want to know what to ask a tech before they roll a truck. Check the box, date it, and keep this with your equipment manuals.

Climate assumed	Hot-humid summers, occasional hard freeze, pollen, clay soil, rural power.
House type	Older stick-built or addition homes, attic air handlers, heat pumps / mini-splits, wells or septic possible.
How to use	Print once. Walk the property with a flashlight and phone. Mark fail items the same day.

Disclaimer: This is an owner maintenance guide, not a license to work on sealed refrigerant circuits, gas piping, or service-panel internals beyond what your jurisdiction allows. If a box scares you, stop and hire it.

1. Spring — March / April

When: After the last freeze risk, before sustained 85°F days.

Goal: cooling season readiness, water after freeze, pest and roof after winter wind.

HVAC & airflow

- Replace or wash filters. Write the date on the new filter.
- Clear 2 feet around the outdoor unit. Pull grass, leaves, and dog hair off the coil fins with a fin comb or light hose from the inside out if accessible.
- Confirm the outdoor disconnect works and the whip/conduit is not chewed or sun-rotted.
- Listen to first cool call: compressor starts, fan spins, no grinding, no ice after 15 minutes.
- Check condensate drain: pour a cup of water in the pan / trap. It should leave the house, not sit.
- If you have a mini-split: wash washable filters, wipe indoor coil face, confirm drain line drips outside.
- Attic air handler: look for rust in the drain pan, wet insulation, and a working float switch.
- Test both stages if you have heat strips or emergency heat — know what that switch does before July.

Water, roof, and envelope

- Walk the roof from the ground after rain. Look for missing tabs, lifted flashing at the chimney and wall transitions.
- Clean gutters and downspouts. Splash blocks should throw water away from the slab, not under it.
- Hose-test hose bibs and the pressure-reducing valve area for freeze cracks you missed in February.
- Flush the water heater drain (if sediment-prone well or old tank). Check T&P; discharge is open and aimed safe.
- Look under sinks and at the water heater pan. Brown rings mean a slow leak that will find the subfloor.

Electrical & safety

- Test every GFCI (kitchen, bath, garage, outdoor). Reset. If it will not reset, that circuit is done until repaired.
- Smoke and CO detectors: replace batteries on a set calendar, not when they chirp at 2 a.m.
- Generator / transfer switch dry run if you own one. Confirm interlock still prevents backfeed.
- Look at the meter base and mast for loose weatherhead or chewed SE cable (rural rodent season).

Yard & pests (Texas rural)

- Trim trees off the service drop and off the roof. 10 feet from the mast is a good target.
- Check for wasp nests in the outdoor disconnect, dryer vent, and under the eaves.
- Walk the septic field if you have one — soggy in dry weather is a problem, not a feature.
- Mower and string-trimmer: do not scalp against the condenser cabinet or vinyl corners.

Spring fail items that should not wait: no cooling on first call, standing water at the slab, GFCI dead, T&P; dripping constantly.

2. Summer — June / mid-season check

When: After the first heat wave, then again if the system runs 16+ hours a day.

Goal: catch a dying capacitor, a clogged drain, and a dirty coil before the compressor dies on a 102° day.

Cooling system under load

- Feel supply vs return after 20 minutes. Big rooms should be clearly cooler, not “sort of.”
- Outdoor unit: cabinet hot is normal; ice on the suction line at the service valves is not (except brief pull-down).
- If the outdoor fan runs but the compressor is silent or hums and trips — stop. That is often a capacitor or a locked compressor. Do not keep resetting.
- Check breaker tightness by hand on the disconnect deadfront only if you are qualified; otherwise note trip history.
- Measure or note indoor humidity. Sticky at 78° set-point usually means airflow, drain, or oversized runtime — not “add more Freon.”
- Mini-split: clean filters again. A dirty cassette in August is how you get freeze-up and a service call.
- Secondary drain or wet switch: if the unit shut off and the pan is full, clear the primary before you jumper anything.

House comfort and power

- Attic hatch weatherstrip and insulation dam still in place? A missing hatch is a 1-ton leak.
- West windows: simple solar screens or interior cellular shades beat another half-ton of AC.
- Well pump or pressure tank short-cycling in heat? Note start count; heat and irrigation stack load.
- Whole-house surge device indicator lights still good after storms.

Do not:

Do not add refrigerant because a neighbor said the pressures “look low” without airflow, superheat/subcool, and a scale. Most summer “low on gas” calls on older systems are dirty coils, dirty filters, or a failing fan motor.

3. Fall — late October / early November

When: After first cool nights, before the first hard freeze warning.

Goal: heat that actually starts, pipes that do not split, and combustion / electric heat that is safe.

Heat ready

- Switch thermostat to heat and run a cycle. Confirm air is warm at the closest register within a few minutes (strips) or after the heat pump outdoor unit has run.
- Know the difference between HEAT and EMERGENCY/AUX. Emergency heat on a heat pump is expensive strips — not the default.
- Heat pump: outdoor unit should run in heat. If it ices solid and never defrosts, that is a service issue, not “add heat.”
- Gas furnace (if present): flame looks steady blue, no rollout, vent pipe tight, no soot at the draft hood.
- Electric air handler: heat-strip breakers on, no burnt smell on first call of the season.
- Replace filter again. Fall pollen and AC dust load the first heat cycle.
- Mini-split heat mode test on each head. Confirm outdoor unit reverses and is not still trying to cool.

Freeze prep — North Texas

- Disconnect and drain garden hoses. Open hose bibs after drain-down if they are frost-free; if not, insulate and know how to shut the interior valve.
- Insulate exposed pipes in crawl, garage, and pump house. Foam is cheap; a split PEX or copper overnight is not.
- Locate the main shutoff and the water-heater shutoff. Put a tag on both.
- Drip strategy: which two fixtures you will crack open on a 15°F night, and which hose bibs stay off.
- Well and pressure tank house: heat tape tested, door seals, and a cheap lamp or thermostatically controlled heat if that building has frozen before.
- Irrigation backflow: drain or insulated and wrapped. That brass body is a classic freeze casualty.
- Attic: if you have a unit or pipes up there, a 20° night with no heat in the attic is how you get a ceiling rain.

Roof, chimney, combustion air

- Gutters clear before leaf drop finishes. Ice dams are rare here; fascia rot is not.
- Wood stove or fireplace: cap on, damper works, last year's ash out, CO detector in the same living space.
- Generator fuel fresh or stabilized. Transfer switch exercise.

4. Winter — January check + freeze events

When: Mid-winter, and again the day before a forecast hard freeze.

Goal: survive the night the grid or the well house wants to quit.

During a freeze warning

- Open cabinet doors under kitchen and bath sinks on exterior walls.
- Set heat to a number you will actually keep — 55–60°F minimum if you leave. Dead-set-back to 50° on a leaky house is how pipes go.
- Drip the two fixtures you already chose. A pencil-thin stream, not a garden hose.
- Confirm the well house or pump closet is warm to the touch before bed.
- If you lose power: know whether your heat is electric strips (will not run) or gas (may still run). Have a plan that does not involve a garage heater in the living room.
- After the freeze: do not open the main if you hear water in a wall. Shut it, open a hose bib, find the split.

Mid-winter systems

- Filter check — winter dust and stripped runtime still load filters.
- Heat pump outdoor coil iced after a wet 30° day is often normal until defrost. Iced for hours with no steam-off cycle is not.
- Listen for short-cycling. A unit that starts every 3 minutes is wearing the compressor and the strips.
- Check the condensate line even in winter on heat pumps that make water in defrost.
- Batteries in thermostats. A dead stat on a January night is a dumb way to freeze pipes.

5. Year-round monthly 20-minute walk

Do this the first Saturday of the month. It catches 80% of expensive surprises.

- Look at the indoor drain pan / wet switch area with a flashlight.
- Glance at the outdoor unit: level, debris, odd noise last time it ran.
- One GFCI test (rotate which one).
- One sink base and the water heater area.
- Ceiling stains — new ones only appear after weather. Photograph and date them.
- Breaker panel cover: no rust streaks, no hot smell, directory still readable.
- Write runtime notes: “AC ran all afternoon, house 76°, outdoor 98°.” That sentence is gold when you call a tech.

6. What to write down once and keep in this packet

Outdoor unit model / serial	
Indoor unit / air handler / heads	
Filter size(s)	
Thermostat type / batteries	
Main water shutoff location	
Water heater age / type	
Panel location / main size	
Septic pumped (date)	
Well / pressure tank notes	
Last capacitor / contactor service	
Preferred parts houses	

7. How this product is meant to be used in the business

Give the one-page monthly walk away free. Sell the full seasonal pack. Record four short videos that walk each season on your own house. That is the funnel: free habit → paid checklist → paid Zoom diagnosis when a box fails.

Suggested price for this PDF as a stand-alone: \$19. Bundle with a 20-minute seasonal video walk-through: \$47. Do not add refrigerant charts or electrical torque specs to a homeowner PDF — keep liability with the owner’s own license and local code.

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