



Homeowner Fall HVAC Transition Checklist

Use this checklist during Central Montana's fall transition season, before sustained cold weather arrives. A few simple checks now can help catch problems while the weather is still forgiving.

Call an HVAC Technician if you find issues with complex components (control board, igniter), recurring electrical problems, persistent gas supply issues, or anything you feel uncomfortable handling.

Step-by-Step Winter Prep

1. Cooling Season Close Out

- ☐ Clear leaves, grass clippings, weeds, and debris from around the outdoor AC unit.
- ☐ If using a cover, make sure it is designed for the equipment.
- ☐ If you have a heat pump, leave the outdoor unit uncovered as it may operate during winter.

2. Check the Filter

- ☐ Remove and inspect the HVAC filter.
- ☐ Replace if it is visibly dirty.

3. Test the Heat Before You Need It

- ☐ On a cool day, switch the thermostat from cooling to heating.
- ☐ Raise the set temperature enough to create a call for heat.
- ☐ Allow the system a few minutes to start, then confirm warm air is reaching the registers.
- ☐ Notice any unusual noises, repeated shutdowns, smoke, gas odors, or persistent burning smells.

4. Safety, Airflow, and Thermostat

- ☐ Test carbon monoxide alarms and replace batteries when needed.
- ☐ Keep boxes, storage, and household supplies away from the furnace or boiler.
- ☐ Make sure combustion-air openings, exhaust pipes, and exterior vents are unobstructed.
- ☐ Check that supply registers or return-air grilles are not blocked.
- ☐ Review heating schedules on your programmable or smart thermostat.

5. Heat Pump and Mini Split Owners

- ☐ Clean indoor mini split filters according to the manufacturer's instructions.
- ☐ Keep outdoor heat pump units clear of leaves, snow buildup, and other obstructions.