



## Preventative Maintenance Plan Information

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## ***What is a Preventative Maintenance Plan?***

According to ACCA (Air Conditioning Contractors of America) Preventative Maintenance Plans Agreements (PMPs) are agreements between you and your contractor for scheduled inspections and maintenance of your heating, ventilation, and air conditioning (HVAC) system. PMPs are generally scheduled semi-annually to maintain peak efficiency, prevent utility overpayment, and avert system failures through predictive maintenance that can help extend the life of your HVAC system. Sometimes PMPs are also referred to as “planned maintenance agreements,” or “preventative service agreements.” PMPs usually consist of fall and spring scheduled sessions for a service technician to go through your entire HVAC system preparing it for the upcoming season in a proactive approach before system failure and prior to overpaying your utility company.

The HVAC system is most likely the single biggest user of energy in your home.

Out of Sight, NOT Out of Mind The old but true cliché “out of sight, out of mind” is often the reason for neglected maintenance guidelines for your HVAC system. HVAC systems are usually installed where they aren’t seen, such as in a section of the garage, a closet, in the attic, on rooftops, or under or behind the house, making them easy to ignore. The systems are simply taken for granted, until they fail. Decreased efficiency, utility overpayment, discomfort, loss of productivity, eventual premature replacement, and higher repair costs are the result. *(According to many equipment manufacturers, a 10% refrigerant loss will result in a 20% decrease in system efficiency!)*

Just because your HVAC system is out of sight, does not mean it can be neglected. Getting your HVAC system checked twice annually is just as important as changing the oil in your car every 3,000 miles!

## ***What is the difference between Preventative Maintenance Plan Inspection and System Inspection?***

**The Costs** is the **BIG** difference. The services provided under a Pre-Paid PMP and System Inspection are IDENTICAL.

When you are a sign up for an annual Pre-Paid PMP you are getting you inspection(s) at almost Half of the cost of a regular priced system inspection.

## ***What additional benefits do Preventative Maintenance Plan Customers get?***

**Priority Service:** By participating in this program you become a “Preferred Customer”. Should a system failure occur during the heat of the summer or the cold of the winter, you will be moved to a priority status on any service call.

**Savings:** PMPs typically more than pay for themselves through higher efficiency, less utility overpayment, and contractor discounts. PMP customers receive a 10% discount on all parts and services performed during the entire year.

**Peace of Mind:** Predictive maintenance will mean fewer system failures and a longer life for your HVAC equipment.

## ***During each PMP visit the technician will do the following:***

- Check system functions, safety controls and adjust the operating sequence where appropriate.
- Inspect electrical controls (thermostats) for proper operation.
- Inspect electrical components and connections and repair/replace or tighten as required.
- Ensure proper airflow and change dirty air filters as needed.
- Inspect pumps, lubricate, and check flow rates if applicable.
- Inspect motors for proper operation, clean and or lubricate as needed.
- Inspect blowers for proper operation, clean and/or lubricate as needed.
- Examine belts, adjust and align if applicable.

## ***What does the service technician do differently when inspecting my heating and air conditioning system in the Spring and in the Fall?***

The major factor in determining the service technician’s procedure with respect to the season is the type of system that is being inspected.

**Heat Pumps** are the most common type of systems that we have here in our service area. These systems utilize practically the same components to heat and cool our homes. Because of this fact, the inspection procedure is very similar in the spring and fall. Fall inspections repeat a number of the summer procedures. The most notable differences occur during the heating season. At times of lower outdoor temperatures a Heat Pump system may utilize its auxiliary heat strips. During this time the system may also go through a very necessary defrosting cycle. The parts and controls that govern these unique functions will be tested and evaluated each Fall to insure maximum comfort and greatest efficiency during the heating season.

<p><b>Heat Pump Spring Inspection</b> (preparation for summer season) In addition to what is done at each visit we will:</p> <ul style="list-style-type: none"> <li>■ Inspect inside coil and clean as necessary to ensure proper operation.</li> <li>■ Inspect condensate pans, condensate traps, and condensate lines and clean as necessary to prevent obstructions.</li> <li>■ Inspect outside coil, clean and straighten fins as necessary to ensure proper operation.</li> <li>■ Check refrigerant levels and if low, find the leak.</li> </ul>	<p><b>Heat Pump Fall Inspection</b> (preparation for winter season) In addition to what is done at each visit we will:</p> <ul style="list-style-type: none"> <li>■ Inspect inside coil and clean as necessary to ensure proper operation.</li> <li>■ Inspect auxiliary heat strips for proper operation.</li> <li>■ Check Defrost Control cycling.</li> <li>■ Inspect outside coil, clean and straighten fins as necessary to ensure proper operation.</li> <li>■ Check refrigerant levels and if low, find the leak.</li> </ul>
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**Gas Heating (LP or Natural) with Air Conditioning** would be the next most popular type system in our service area. These systems utilize very different components to heat or cool our homes. Because of this fact the inspection procedure is very different in the spring and fall.

<p><b>Air Conditioning Spring Inspection</b> (preparation for summer season) In addition to what is done at each visit we will:</p> <ul style="list-style-type: none"> <li>■ Inspect inside coil and clean as necessary to ensure proper operation.</li> <li>■ Inspect condensate pans, condensate traps, and condensate lines and clean as necessary to prevent obstructions.</li> <li>■ Inspect outside coil, clean and straighten fins as necessary to ensure proper operation.</li> <li>■ Check refrigerant levels and if low, find the leak.</li> </ul>	<p><b>Gas Heating (LP or Natural) Fall Inspection</b> (preparation for winter season) In addition to what is done at each visit we will:</p> <ul style="list-style-type: none"> <li>■ Inspect and clean the burner assembly.</li> <li>■ Adjust air/fuel ratio of burner and perform combustion analysis. (<i>Analysis is a means of fine-tuning a burner to achieve maximum fuel efficiency and "optimum firing."</i>)</li> <li>■ Gas pressure is checked and will be properly set.</li> <li>■ Visually or with remote camera, inspect heat exchanger for cracks.</li> </ul>
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**Oil Furnaces with Air Conditioning** These systems utilize very different components to heat or cool our homes. Because of this fact the inspection procedure is very different in the spring and fall.

<p><b>Air Conditioning Spring Inspection</b> (preparation for summer season) In addition to what is done at each visit we will:</p> <ul style="list-style-type: none"> <li>■ Inspect inside coil and clean as necessary to ensure proper operation.</li> <li>■ Inspect condensate pans, condensate traps, and condensate lines and clean as necessary to prevent obstructions.</li> <li>■ Inspect outside coil, clean and straighten fins as necessary to ensure proper operation.</li> <li>■ Check refrigerant levels and if low, find the leak.</li> </ul>	<p><b>Oil Furnaces Fall Inspection</b> (preparation for winter season) In addition to what is done at each visit we will:</p> <ul style="list-style-type: none"> <li>■ Inspect and clean the burner assembly.</li> <li>■ Adjust air/fuel ratio of burner and perform combustion analysis. (<i>Analysis is a means of fine-tuning a burner to achieve maximum fuel efficiency and "optimum firing."</i>)</li> <li>■ Oil pressure is checked and will be properly set.</li> <li>■ Visually or with remote camera, inspect heat exchanger for cracks.</li> <li>■ Nozzle and filter will be replaced.</li> </ul>
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**Package Units (Self-Contained Systems)** will follow the same check list for either Heat Pumps or Gas Heating with Air Conditioning depending upon the type of system that you have.

**Mini Splits (Ductless Systems)** are designed for simplicity and efficiency. Of course, as with any equipment, a regular regiment of Preventative maintenance can help ensure longer life and fewer problems for your mini-split units. Preventative maintenance for ductless mini-split units are a little less involved than what is needed for traditional ducted systems.

<p><b>Mini Split Spring Inspection</b> (preparation for summer season)</p> <ul style="list-style-type: none"> <li>■ Check system functions and adjust the operating sequence where appropriate.</li> <li>■ Inspect electrical controls for proper operation.</li> <li>■ Inspect electrical components and connections and repair/replace or tighten as required.</li> <li>■ Remove and clean front panel.</li> <li>■ Remove and clean filter(s).</li> <li>■ Inspect outside coil, clean and straighten fins as necessary to ensure proper operation.</li> <li>■ Check refrigerant levels and if low, find the leak.</li> <li>■ Inspect condensate drain lines and clean as necessary to prevent obstructions.</li> </ul>	<p><b>Mini Split Fall Inspection</b> (preparation for winter season)</p> <ul style="list-style-type: none"> <li>■ Check system functions and adjust the operating sequence where appropriate.</li> <li>■ Inspect electrical controls for proper operation.</li> <li>■ Inspect electrical components and connections and repair/replace or tighten as required.</li> <li>■ Remove and clean front panel.</li> <li>■ Remove and clean filter(s).</li> <li>■ Inspect outside coil, clean and straighten fins as necessary to ensure proper operation.</li> <li>■ Check refrigerant levels and if low, find the leak.</li> </ul>
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**Electronic Air Cleaners** are inspected and cleaned according to the manufactures specifications.

**Humidifiers and Dehumidifiers** are inspected and cleaned according to the manufactures specifications.

## Plan Type Information

**Plan A** provides you with 1 scheduled inspection per calendar year. *(Please indicate on the return portion if you would like this inspection in the spring or fall.)*

**Plan B** provides you with 2 scheduled inspections per calendar year. *(One in the spring and one in fall.)*

Pre-Paid PMPs for Cooling Tune-ups will be conducted during regular working hours Monday thru Friday 8:30am to 4:30pm, from April 1<sup>st</sup> thru June 30<sup>th</sup>. Pre-Paid PMPs for Heating Tune-ups will be conducted from October 1<sup>st</sup> thru December 31<sup>st</sup>. Crystal Coast Heating & Air will begin calling to schedule Cooling Tune-ups the first part of April and the first part of October for Heating Tune-ups. Crystal Coastal Heating & Air will make at least 2 attempts to reach you by phone and if unsuccessful you will then be notified by mail that you need to reach our office to schedule your tune-up.

### Terms and Conditions

Crystal Coast Heating & Air reserves the right to reject any policy if an inspection by our service technician finds the equipment is in such condition that the service will be unsatisfactory to both parties. The equipment must be brought up to industry standards at the customer's expense before acceptance of this agreement. If possible, this work will be accomplished at the initial maintenance check. In the event any equipment is not repairable, Crystal Coast Heating & Air will quote the replacement cost.

The customer cannot assign or transfer the agreement without the prior written consent of Crystal Coast Heating & Air.

Any changes, adjustments or repairs made by others unless authorized or approved by Crystal Coast Heating & Air in writing shall, at its option, terminate its obligation hereunder.

Crystal Coast Heating & Air will not be required to furnish without extra cost any items of material, labor or equipment which are recommended or required by local code regulations, insurance companies, government, state, municipal or other authorities. Crystal Coast Heating & Air will endeavor to render prompt and efficient service hereunder but it is expressly agreed that Crystal Coast Heating & Air shall in no event be liable for damage or loss caused by delay or any loss arising out of performance of this agreement. Crystal Coast Heating & Air does not guarantee the proper functioning of your equipment and shall not be liable for any loss or damage resulting from the improper functioning of your equipment.

This agreement may be terminated by either party upon thirty (30) days written notice of either party's intention to terminate. A refund for the remaining contract

period will be made on a prorated basis, less administrative fees and a deduction for work already completed.

To enroll in the Preventative Maintenance Plan Program, complete the **Preventative Maintenance Plan Form**. Send Form and Payment To: Crystal Coast Heating & Air  
PO Box 507  
Morehead City, NC 28557

For Questions you can call us at (252)247-7200

### Please keep for your records.

Contract Begin Date \_\_\_\_\_  
*(Date Contract was signed and Payment made)*

Plan Type Selected: Plan A or Plan B  
*(Circle One)*

Number of Systems you have \_\_\_\_\_

Number of Mini Split Systems you have \_\_\_\_\_

Number of Humidifiers/ Dehumidifiers you have \_\_\_\_\_

Number of Electronic Air Cleaners you have \_\_\_\_\_

Total Amount of your contract \_\_\_\_\_ Paid By \_\_\_\_\_  
*(Amount you paid)*

Date of Inspection(s) \_\_\_\_\_

Notes:

## 2016 Preventative Maintenance Plan Form

Billing Information			Property Location Information			
Name:				Location ID:		
Address:				Property Address:		
Phone:				Contact Person:		
Alt Phone:				Contact Person Phone:		
1st System	Number of Additional Systems	Number of Electronic Air Cleaners	Number of Humidifiers	Number of Mini Split Systems (Outdoor Unit and 1 Indoor Unit)	Number of Each Additional Mini Split Indoor Units	
N/A	[ ]	[ ]	[ ]	[ ]	[ ]	
Costs for Plan A (First System)	Cost for Each Additional System	Cost for Each Electronic Air Cleaner	Cost for Each Humidifier/Dehumidifier	Cost for Each Mini Split System	Cost for Each Additional Mini Split System IDU	Total
	\$85.00	\$50.00	\$50.00	\$65.00	\$25.00	=
	X (Number of Each Additional System)=	X (Number of Each Electronic Air Cleaners)=	X (Number of Each Humidifier)=	X (Number of Each Mini Split System)=	X (Number of Each Mini Split IDU)=	A+B+C+D+E+F
A	B	C	D	E	F	G
\$90.00	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
Costs for Plan B (First System)	Cost for Each Additional System	Cost for Each Electronic Air Cleaner	Cost for Each Humidifier/Dehumidifier	Cost for Each Mini Split System	Cost for Each Additional Mini Split System IDU	Total
	\$170.00	\$100.00	\$100.00	\$130.00	\$50.00	=
	X (Number of Each Additional System)=	X (Number of Each Electronic Air Cleaners)=	X (Number of Each Humidifier)=	X (Number of Each Mini Split System)=	X (Number of Each Mini Split IDU)=	A+B+C+D+E+F
A	B	C	D	E	F	G
\$175.00	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]

**Credit Card Information:**

Visa    Master Card    Discover   Exp. Date: Month \_\_\_\_\_ Year \_\_\_\_\_

Card #

**Check Information:**

Check # \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_ Email \_\_\_\_\_

\*Please indicate changes to billing or contact information\*