

# ***PTAC** Preventive Maintenance Guide*

*Step-by-step instructions and information to  
keep your units operating in peak condition*



# *The Importance of Proper PTAC Maintenance*



Welcome to the PTAC Preventive Maintenance Guide from Direct Supply® Equipment & Furnishings™! This helpful resource walks you through the steps required to keep your PTAC units in peak condition for optimum performance. Consistent preventive maintenance on your PTAC units brings you these benefits:

## **Protect your residents from dangerous temperature extremes**

Because elderly residents have a limited ability to adapt to rapid temperature changes, F-Tag 257 states that facilities “must provide comfortable and safe temperature levels,” and goes on to recommend a “temperature range of 71° to 81°F”

## **Well-functioning PTAC units save energy and money**

Properly maintaining your PTAC units to maximize their operation can help curb energy costs. This can result in 7% less energy usage, equaling \$40 to \$50\* per unit in savings per year. Plus, properly maintained units are less likely to rattle or make unnecessary noise

## **Proper maintenance extends equipment life**

Preventive steps performed monthly and seasonally reduce the need for replacement parts and expensive service calls by catching small problems before they impair the unit’s operation

Keeping units maintained helps ensure that residents, staff and guests enjoy clean, comfortable air year round.

\* Numbers based on national energy price average.

# Step-By-Step Preventive Maintenance

## Preventive maintenance tasks outlined in this guide:

### Monthly Maintenance

- Front Filters
- Room-Side Front Cover
- Outdoor Vent Filter (if applicable)

### Seasonal Maintenance

- Indoor Evaporator Coil
- Blower Wheel
- Outdoor Condenser Coil & Basepan
- Wall Sleeve

### Post-Maintenance Check

- Clearance & Operation

Reviewing these standard tasks for PTAC maintenance will help train your staff to keep any unit operating smoothly. It's important to note, however, that these are general maintenance guidelines – consult the owner's manual to get specific instructions for your units.

**When it's time to order new PTAC units and filters for your facility, call your account manager at 1-800-634-7328.**



# Monthly Maintenance

## Front Filters

One of the most important things you can do to maintain your PTAC units is clean the air filters at least once each month, or more often in a new facility or one with new carpeting. Clogged filters reduce cooling, heating and airflow, and can cause major damage to your PTAC system components. In fact, dirty filters can decrease operating efficiency by as much as 20%.



**Step 1.** Turn off and unplug the unit.



**Step 3.** Vacuum any accumulated dust and dirt off the filters.



**Step 2.** Slowly remove the filters from the unit. For some units, you may need to remove the front panel to access the filters.



**Step 4.** Closely inspect filters and discard any that are damaged.



**Step 5.** Rinse filters under running water and allow to dry completely.



**Step 6.** Return filters to the unit and replace any discarded filters with new ones, before plugging in and turning on the unit.

**NOTE:** Keeping extra filters on-hand will reduce potential downtime. You can trade them in to replace the dirty filters and have your machines running right away. Afterward, just clean the dirty ones all at once and have them ready for your next changeout. Call your Direct Supply account manager at 1-800-634-7328 when you need extra replacement filters.



# *Monthly Maintenance*

## Room-Side Front Cover

The room-side front cover of your PTAC unit should be cleaned at least once a month to prevent dust and debris from settling on it. If dust is allowed to sit on the cover, it could get caught in the indoor coil and cause operational problems in your PTAC.



**Step 1.** Turn off and unplug the unit.



**Step 3.** Remove dust and dirt from the cover with a vacuum and soft brush attachment.



**Step 2.** Remove the room-side front cover of the unit.



**Step 4.** Clean the exterior of the cabinet with a mild soap and water solution.



**Step 5.** Allow cover to dry completely and reinstall before plugging in and turning on the unit.

**NOTE:** Don't use harsh chemicals to clean the exterior of the unit – they can cause the plastic to dry out, become brittle and break easily.

# Monthly Maintenance

## Outdoor Vent Filter (If Applicable)

If your PTAC unit is operated with the outdoor vents open, the vent filter should also be cleaned monthly to ensure that your unit operates as efficiently as possible and airflow is not restricted. If the vents are closed, cleaning will not be needed.



**Step 1.** Turn off and unplug the unit.



**Step 3.** Pull the unit from the sleeve and remove the filter.



**Step 2.** Remove the room-side front cover of the unit.



**Step 4.** Vacuum accumulated dust and dirt off the filter.





**Step 5.** Rinse the filter with running water and allow it to dry completely.



**Step 7.** Replace filter and slide the unit back into sleeve.



**Step 6.** Remove any dirt or debris from bottom of the unit.



**Step 8.** Reattach the cover, then plug in and turn on unit.

# *Seasonal Maintenance*

## Indoor Evaporator Coil

If an air filter has been left dirty, dust and dirt could be pulled into the indoor coil, which can cause operational problems.



**Step 1.** Turn off and unplug the unit.



**Step 3.** Inspect the evaporator coil for accumulated dust and dirt.



**Step 2.** Remove the room-side front cover of the unit.



**Step 4.** If cleaning is necessary, use a vacuum with a soft brush attachment to remove loose dust and dirt.



**Step 5.** If more cleaning is needed, use a spray bottle with a mild household cleaner and vacuum up the liquid with a wet/dry vacuum.

Be sure to completely cover the electronic control box and knob area with plastic, held securely with duct tape.



**Step 6.** Allow the unit to dry thoroughly.



**Step 7.** Once dry, reattach the cover, then plug in and turn on unit.

# *Seasonal Maintenance*

## Blower Wheel

Keep the blower wheel clean to promote energy efficiency and smooth operation of your PTAC unit.



**Step 1.** Turn off and unplug the unit.



**Step 3.** Use a vacuum with a soft brush attachment to clean off each blade on the blower wheel.



**Step 2.** Remove the room-side front cover of the unit.



**Step 4.** Run the vacuum brush along the blower scroll that surrounds the blower wheel to clean out additional debris.



**Step 5.** Replace unit cover, then plug in and turn on unit.

**NOTE:** Insert a piece of cardboard between the blower wheel and the opening in the blower scroll to prevent fungus and other debris from falling into the coil.

# Seasonal Maintenance

## Outdoor Condenser Coil & Basepan

Dirty outdoor coils can increase your utility bills and decrease the life of your air conditioners. PTAC units located on lower floors tend to get dirtier than units on upper floors and should be checked seasonally. Outdoor coils on these units may need to be cleaned more often to prevent premature failure of the compressor. This can also be the case if the units are exposed to construction sites, freeways, flowering trees and other pollutants.



**Step 1.** Turn off and unplug the unit.



**Step 3.** Pull the unit from the wall sleeve and move it to an area with a service drain.



**Step 2.** Remove the room-side front cover of the unit.



**Step 4.** Remove plastic shroud to access the coils and basepan. Check the inside of the condenser coil for dirt or soot buildup.





**Step 5.** Vacuum out debris from the basepan using a wet/dry vac.



**Step 7.** Vacuum out any remaining moisture with a wet/dry vac. Reattach plastic shroud after unit has dried completely.



**Step 6.** Apply a mild coil cleaner to coils and basepan with spray bottle and rinse out using a hose with a spray attachment.



**Step 8.** Return unit to room and reinstall into wall sleeve. Reattach cover, then plug in and turn on unit.

# *Seasonal Maintenance*

## Wall Sleeve

Checking your wall sleeve can be done while completing any of the other seasonal maintenance steps when the unit is out of the wall.



**Step 1.** Check the caulking around the sleeve to ensure the air and water openings are properly sealed. The sleeve should be caulked on all four sides, inside and outside. Recaulk as necessary.



**Step 2.** Check the level of the wall sleeve. It should be slightly tilted to the outside – about  $\frac{1}{4}$  of the level bubble – or exactly level if an internal drain system is used. Re-level wall sleeve as necessary to ensure proper drainage.

# *Post-Maintenance Check*

## Clearance & Operation

After performing any maintenance on your PTAC unit, you should double-check that the unit is operating properly.



**Step 1.** Ensure indoor intake air and outdoor discharge air paths have not become blocked or restricted.

For proper operation, an 8" clearance is recommended between the unit and furniture or other objects.



**Step 2.** Check the front cover for proper mounting. Inspect the cord and secure the electrical connections.



**Step 3.** Verify that pushbuttons and knobs are in place and operational. Check that the unit works properly in both the heating and cooling modes.

# Maintenance Schedules

It's important that your staff keep track of the maintenance performed on each and every unit in your facility. That way, when responsibilities change or turnover occurs, other staff members can easily see what's been completed and what's next on the list.

Simply print the maintenance schedule on the following page (make as many copies as you need to track all the PTAC units in your facility) and track each unit's maintenance.

Use the schedule to track the monthly and seasonal maintenance tasks outlined in this guide:

## Monthly Maintenance

- Front Filters
- Room-Side Front Cover
- Outdoor Vent Filter (if applicable)

## Seasonal Maintenance

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## Post-Maintenance Check

- Clearance & Operation



TELS is a web-based maintenance management and tracking system that makes it easier to stay organized and maintain equipment. Streamline your PTAC and other maintenance management with TELS, the only Life Safety Code compliance and facility maintenance management system designed exclusively for Senior Living communities. Call 1-888-270-4407 or visit [TELS.net](http://TELS.net) today to learn more and put the power of TELS to work for you.

## PTAC Maintenance Schedule

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