

Division 23

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SECTION 230100
HVAC EQUIPMENT COMMON REQUIREMENTS

PART 1 - GENERAL

1.1 SUMMARY

- A. All HVAC work shall be responsibility of the General Contractor unless the project includes a specific HVAC Prime Contract.
- B. The HVAC scope of work shall include all costs for labor, materials, equipment, tools, overhead & profit, and supplies required to provide complete and functioning units and their supporting appurtenances such as vents, drains, controls, thermostats, signal wire and conduit,
- C. Provision of power and control wiring, including terminations, to applicable units shall be responsibility of the Electrical Prime Contractor.

1.2 RELATED DOCUMENTS

- A. Drawings and general provisions of the Contract, including General and Supplementary Conditions and Division 01 Specification Sections, apply to this Section.

1.3 SUBMITTALS

- A. Contractor shall make an installation submittal to the Engineer that indicates the location and weight of each unit heater, fan, or other HVAC equipment. The submittal shall indicate the method that will be used to support the units and their attachments to the building or space they are being installed.
- B. Contractor shall make a controls submittal to the Engineer that indicates the method for controlling the HVAC units both local and remote. Type of thermostats or other controls shall be indicated and wiring diagram shall be provided with submittal.

PART 2 - PRODUCTS

2.1 GENERAL

- A. Class-I Div I requirements will apply to all units, actuators, and controls in closed areas where sanitary sewage is present such as wet wells and headworks buildings or as noted on the Drawings.
- B. All units shall be of corrosion resistant design when not located in an office space.

2.2 UNITS

- A. This specification section shall apply to all HVAC units installed under this Contract including but not limited to:

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1. Unit Heaters
2. Split Unit Systems
3. Exhaust and Intake Fans
4. Louvers and Dampers
5. Dehumidifiers
6. Boilers

2.3 ACCESSORIES, COMPONENTS, AND CONTROLS

- A. This specification shall apply to all accessories and components required to provide a complete and functioning unit including but not limited to:
1. Mounting brackets, supports, and hardware
 2. Vent Pipes
 - a. Vents shall be insect and weather proof
 3. Condensate pipes
 - a. Condensate Pipes shall be piped to discharge:
 - 1) To the ground if outdoor
 - 2) To a drain if indoor and permitted by the Engineer
 4. Drip legs
 - a. Drip legs shall be installed on natural gas and propane piping
 5. Shut off valves and switches as applicable
 6. Actuators
 7. Thermostats
 8. Humidistats

PART 3 - EXECUTION

3.1 SHIPMENT AND STORAGE

- A. Upon receipt, Contractor shall off-load equipment at installation site using equipment of sufficient size and design to prevent injury or damage. Immediately after off-loading, contractor shall inspect complete unit and appurtenances for shipping damage or missing parts. Any damage or discrepancy shall be noted in written claim with shipper prior to accepting delivery. Contractor shall be responsible for storage of delivered units in a safe and weather proof environment.

3.2 MOUNTING AND INSTALLATION

- A. All equipment installation shall be in accordance with the manufacturer's recommendations.
- B. The weight of the unit heaters, fans and other HVAC equipment shall be verified before purchase and the appropriate hangers and supports will be confirmed and provided by the Contractor.
- C. The Drawings show the general arrangement of the equipment and the major components. The Contractor is responsible for installing a fully operational unit complete with ancillary

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connections such as air, water, power, fuel, and instrumentation. The Contractor is responsible for providing all necessary supports, braces, pads, connections, etc. to make the unit fully functional and operational in accordance with the manufacturer's instructions.

- D. Contractor shall coordinate mounting and installation of all units, and accessory devices to be compatible with ambient and environmental conditions of installation location.
- E. Contractor shall provide penetrations and respective flashing through walls, floors, and ceilings as necessary to route venting pipes, condensate pipes, and any other accessories necessary for the proper function of the HVAC units.
- F. Contractor shall be responsible for piping and connecting units to fuel sources, if applicable.
- G. If dampers are to be installed in a room containing a generator, the Contractor shall coordinate the normal position of the dampers with the Engineer prior to installation.

3.3 STARTING OF EQUIPMENT

- A. Prior to acceptance by Owner, formal start-up and testing of all equipment and control systems shall be conducted by the Contractor, in the presence of the Engineer, to determine if the installed equipment meets the purpose and intent of the specifications. Tests shall demonstrate that all equipment is electrically, mechanically, structurally, and otherwise acceptable; it is safe and in optimum working condition; and conforms to the specified operating characteristics.

3.4 WARRANTY

- A. A written two-year standard warranty from the date of the successful equipment start-up shall be provided by the equipment supplier to guarantee that there shall be no defects in material or workmanship in any item supplied.

END OF SECTION

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SECTION 230513
COMMON MOTOR REQUIREMENTS FOR HVAC EQUIPMENT

PART 1 - GENERAL

1.1 RELATED DOCUMENTS

- A. Drawings and general provisions of the Contract, including General and Supplementary Conditions and Division 01 Specification Sections, apply to this Section.

1.2 SUMMARY

- A. Section includes general requirements for single-phase and polyphase, general-purpose, horizontal, small and medium, squirrel-cage induction motors for use on alternating-current power systems up to 600 V and installed at equipment manufacturer's factory or shipped separately by equipment manufacturer for field installation.

1.3 COORDINATION

- A. Coordinate features of motors, installed units, and accessory devices to be compatible with the following:
 - 1. Motor controllers.
 - 2. Torque, speed, and horsepower requirements of the load.
 - 3. Ratings and characteristics of supply circuit and required control sequence.
 - 4. Ambient and environmental conditions of installation location.

PART 2 - PRODUCTS

2.1 GENERAL MOTOR REQUIREMENTS

- A. Comply with NEMA MG 1 unless otherwise indicated.

2.2 MOTOR CHARACTERISTICS

- A. Duty: Continuous duty at ambient temperature of 40 deg C and at altitude of 3300 feet above sea level.
- B. Capacity and Torque Characteristics: Sufficient to start, accelerate, and operate connected loads at designated speeds, at installed altitude and environment, with indicated operating sequence, and without exceeding nameplate ratings or considering service factor.

2.3 POLYPHASE MOTORS

- A. Description: NEMA MG 1, Design B, medium induction motor.

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- B. Efficiency: Premium efficient, as defined in NEMA MG 1.
- C. Multispeed Motors: Variable torque.
 - 1. For motors with 2:1 speed ratio, consequent pole, single winding.
 - 2. For motors with other than 2:1 speed ratio, separate winding for each speed.
- D. Rotor: Random-wound, squirrel cage.
- E. Bearings: Regreasable, shielded, antifriction ball bearings suitable for radial and thrust loading.
- F. Temperature Rise: Match insulation rating.
- G. Insulation: Class F
- H. Code Letter Designation:
 - 1. Motors 15> HP and Larger: NEMA starting Code F or Code G.
 - 2. Motors Smaller Than 15> HP: Manufacturer's standard starting characteristic.

2.4 ADDITIONAL REQUIREMENTS FOR POLYPHASE MOTORS

- A. Motors Used with Reduced-Voltage and Multispeed Controllers: Match wiring connection requirements for controller with required motor leads. Provide terminals in motor terminal box, suited to control method.
- B. Motors Used with Variable-Frequency Controllers: Ratings, characteristics, and features coordinated with and approved by controller manufacturer.
 - 1. Windings: Copper magnet wire with moisture-resistant insulation varnish, designed and tested to resist transient spikes, high frequencies, and short time rise pulses produced by pulse-width-modulated inverters.
 - 2. Premium-Efficient Motors: Class B temperature rise; Class F insulation.
 - 3. Inverter-Duty Motors: Class F temperature rise; Class H insulation.
 - 4. Thermal Protection: Comply with NEMA MG 1 requirements for thermally protected motors.

2.5 SINGLE-PHASE MOTORS

- A. Motors larger than 1/20 hp shall be one of the following, to suit starting torque and requirements of specific motor application:
 - 1. Permanent-split capacitor.
 - 2. Split phase.
 - 3. Capacitor start, inductor run.
 - 4. Capacitor start, capacitor run.
- B. Multispeed Motors: Variable-torque, permanent-split-capacitor type.

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- C. Bearings: Prelubricated, antifriction ball bearings or sleeve bearings suitable for radial and thrust loading.
- D. Motors 1/20 HP and Smaller: Shaded-pole type.
- E. Thermal Protection: Internal protection to automatically open power supply circuit to motor when winding temperature exceeds a safe value calibrated to temperature rating of motor insulation. Thermal-protection device shall automatically reset when motor temperature returns to normal range.

PART 3 - EXECUTION (Not Applicable)

END OF SECTION 230513

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SECTION 230553
IDENTIFICATION FOR HVAC PIPING AND EQUIPMENT

PART 1 - GENERAL

1.1 RELATED DOCUMENTS

- A. Drawings and general provisions of the Contract, including General and Supplementary Conditions and Division 01 Specification Sections, apply to this Section.

1.2 SUMMARY

- A. Section Includes:
 - 1. Equipment labels.
 - 2. Warning signs and labels.
 - 3. Pipe labels.
 - 4. Duct labels.
 - 5. Stencils.
 - 6. Valve tags.
 - 7. Warning tags.

1.3 ACTION SUBMITTALS

- A. Product Data: For each type of product.
- B. Samples: For color, letter style, and graphic representation required for each identification material and device.
- C. Equipment Label Schedule: Include a listing of all equipment to be labeled with the proposed content for each label.
- D. Valve numbering scheme.
- E. Valve Schedules: For each piping system to include in maintenance manuals.

PART 2 - PRODUCTS

2.1 EQUIPMENT LABELS

- A. Metal Labels for Equipment:
 - 1. Manufacturers: Subject to compliance with requirements, available manufacturers offering products that may be incorporated into the Work include, but are not limited to the following:
 - a. Brimar Industries, Inc.
 - b. Craftmark Pipe Markers.

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- c. Seton Identification Products.
 - d. Or approved equal.
- 2. Material and Thickness: Brass, 0.032-inch stainless steel, 0.025-inch aluminum, 0.032-inch or anodized aluminum, 0.032-inch minimum thickness, and having predrilled or stamped holes for attachment hardware.
 - 3. Letter Color: Black.
 - 4. Background Color: White.
 - 5. Minimum Label Size: Length and width vary for required label content, but not less than 2-1/2 by 3/4 inch.
 - 6. Minimum Letter Size: 1/4 inch for name of units if viewing distance is less than 24 inches, 1/2 inch for viewing distances up to 72 inches, and proportionately larger lettering for greater viewing distances. Include secondary lettering two-thirds to three-quarters the size of principal lettering.
 - 7. Fasteners: Stainless-steel rivets or self-tapping screws.
 - 8. Adhesive: Contact-type permanent adhesive, compatible with label and with substrate.
- B. Plastic Labels for Equipment:
- 1. Manufacturers: Subject to compliance with requirements, available manufacturers offering products that may be incorporated into the Work include, but are not limited to the following:
 - a. Brady Corporation.
 - b. Brimar Industries, Inc.
 - c. Craftmark Pipe Markers.
 - d. Or approved equal.
 - 2. Material and Thickness: Multilayer, multicolor, plastic labels for mechanical engraving, 1/8 inch thick, and having predrilled holes for attachment hardware.
 - 3. Letter Color: Black.
 - 4. Background Color: White.
 - 5. Maximum Temperature: Able to withstand temperatures up to 160 deg F.
 - 6. Minimum Label Size: Length and width vary for required label content, but not less than 2-1/2 by 3/4 inch.
 - 7. Minimum Letter Size: 1/4 inch for name of units if viewing distance is less than 24 inches, 1/2 inch for viewing distances up to 72 inches, and proportionately larger lettering for greater viewing distances. Include secondary lettering two-thirds to three-quarters the size of principal lettering.
 - 8. Fasteners: Stainless-steel rivets or self-tapping screws.
 - 9. Adhesive: Contact-type permanent adhesive, compatible with label and with substrate.
- C. Label Content: Include equipment's Drawing designation or unique equipment number, Drawing numbers where equipment is indicated (plans, details, and schedules), and the Specification Section number and title where equipment is specified.

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- D. Equipment Label Schedule: For each item of equipment to be labeled, on 8-1/2-by-11-inch bond paper. Tabulate equipment identification number, and identify Drawing numbers where equipment is indicated (plans, details, and schedules) and the Specification Section number and title where equipment is specified. Equipment schedule shall be included in operation and maintenance data.

2.2 WARNING SIGNS AND LABELS

- A. Manufacturers: Subject to compliance with requirements, available manufacturers offering products that may be incorporated into the Work include, but are not limited to the following:
1. Brimar Industries, Inc.
 2. Craftmark Pipe Markers.
 3. Seton Identification Products.
 4. Or approved equal.
- B. Material and Thickness: Multilayer, multicolor, plastic labels for mechanical engraving, 1/8 inch thick, and having predrilled holes for attachment hardware.
- C. Letter Color: Black.
- D. Background Color: Yellow.
- E. Maximum Temperature: Able to withstand temperatures up to 160 deg F.
- F. Minimum Label Size: Length and width vary for required label content, but not less than 2-1/8 by 3/4 inch.
- G. Minimum Letter Size: 1/4 inch for name of units if viewing distance is less than 24 inches, 1/2 inch for viewing distances up to 72 inches, and proportionately larger lettering for greater viewing distances. Include secondary lettering two-thirds to three-quarters the size of principal lettering.
- H. Fasteners: Stainless-steel rivets or self-tapping screws.
- I. Adhesive: Contact-type permanent adhesive, compatible with label and with substrate.
- J. Label Content: Include caution and warning information plus emergency notification instructions.

2.3 PIPE LABELS

- A. Manufacturers: Subject to compliance with requirements, available manufacturers offering products that may be incorporated into the Work include, but are not limited to the following:
1. Brimar Industries, Inc.
 2. Craftmark Pipe Markers.

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3. Seton Identification Products.
4. Or approved equal.
- B. General Requirements for Manufactured Pipe Labels: Preprinted, color-coded, with lettering indicating service, and showing flow direction according to ASME A13.1.
- C. Pretensioned Pipe Labels: Precoiled, semirigid plastic formed to partially cover circumference of pipe and to attach to pipe without fasteners or adhesive.
- D. Self-Adhesive Pipe Labels: Printed plastic with contact-type, permanent-adhesive backing.
- E. Pipe Label Contents: Include identification of piping service using same designations or abbreviations as used on Drawings; also include pipe size and an arrow indicating flow direction.
 1. Flow-Direction Arrows: Integral with piping system service lettering to accommodate both directions or as separate unit on each pipe label to indicate flow direction.

2.4 DUCT LABELS

- A. Manufacturers: Subject to compliance with requirements, available manufacturers offering products that may be incorporated into the Work include, but are not limited to the following:
 1. Brimar Industries, Inc.
 2. Craftmark Pipe Markers.
 3. Seton Identification Products.
 4. Or approved equal.
- B. Material and Thickness: Multilayer, multicolor, plastic labels for mechanical engraving, 1/8 inch thick, and having predrilled holes for attachment hardware.
- C. Letter Color: Black.
- D. Background Color: White.
- E. Maximum Temperature: Able to withstand temperatures up to 160 deg F.
- F. Minimum Label Size: Length and width vary for required label content, but not less than 2-1/2 by 3/4 inch.
- G. Minimum Letter Size: 1/4 inch for name of units if viewing distance is less than 24 inches, 1/2 inch for viewing distances up to 72 inches, and proportionately larger lettering for greater viewing distances. Include secondary lettering two-thirds to three-quarters the size of principal lettering.
- H. Fasteners: Stainless-steel rivets or self-tapping screws.

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- I. Adhesive: Contact-type permanent adhesive, compatible with label and with substrate.
- J. Duct Label Contents: Include identification of duct service using same designations or abbreviations as used on Drawings; also include duct size and an arrow indicating flow direction.
 - 1. Flow-Direction Arrows: Integral with duct system service lettering to accommodate both directions or as separate unit on each duct label to indicate flow direction.

2.5 VALVE TAGS

- A. Manufacturers: Subject to compliance with requirements, available manufacturers offering products that may be incorporated into the Work include, but are not limited to the following:
 - 1. Brimar Industries, Inc.
 - 2. Craftmark Pipe Markers.
 - 3. Seton Identification Products.
 - 4. Or approved equal.
- B. Description: Stamped or engraved with 1/4-inch letters for piping system abbreviation and 1/2-inch numbers.
 - 1. Tag Material: Brass, 0.032-inch stainless steel, 0.025-inch aluminum, 0.032-inch or anodized aluminum, 0.032-inch minimum thickness, and having predrilled or stamped holes for attachment hardware.
 - 2. Fasteners: Brass wire-link chain or beaded chain or S-hook.
- C. Valve Schedules: For each piping system, on 8-1/2-by-11-inch bond paper. Tabulate valve number, piping system, system abbreviation (as shown on valve tag), location of valve (room or space), normal-operating position (open, closed, or modulating), and variations for identification. Mark valves for emergency shutoff and similar special uses.
 - 1. Valve-tag schedule shall be included in operation and maintenance data.

PART 3 - EXECUTION

3.1 PREPARATION

- A. Clean piping and equipment surfaces of substances that could impair bond of identification devices, including dirt, oil, grease, release agents, and incompatible primers, paints, and encapsulants.

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3.2 GENERAL INSTALLATION REQUIREMENTS

- A. Coordinate installation of identifying devices with completion of covering and painting of surfaces where devices are to be applied.
- B. Coordinate installation of identifying devices with locations of access panels and doors.
- C. Install identifying devices before installing acoustical ceilings and similar concealment.

3.3 EQUIPMENT LABEL INSTALLATION

- A. Install or permanently fasten labels on each major item of mechanical equipment.
- B. Locate equipment labels where accessible and visible.

3.4 PIPE LABEL INSTALLATION

- A. Piping Color Coding: Painting of piping is specified in Section 099000 "Construction and Restoration Painting."
- B. Pipe Label Locations: Locate pipe labels where piping is exposed or above accessible ceilings in finished spaces; machine rooms; accessible maintenance spaces such as shafts, tunnels, and plenums; and exterior exposed locations as follows:
 - 1. Near each valve and control device.
 - 2. Near each branch connection, excluding short takeoffs for fixtures and terminal units. Where flow pattern is not obvious, mark each pipe at branch.
 - 3. Near penetrations and on both sides of through walls, floors, ceilings, and inaccessible enclosures.
 - 4. At access doors, manholes, and similar access points that permit view of concealed piping.
 - 5. Near major equipment items and other points of origination and termination.
 - 6. Spaced at maximum intervals of 50 feet along each run. Reduce intervals to 25 feet in areas of congested piping and equipment.
 - 7. On piping above removable acoustical ceilings. Omit intermediately spaced labels.
- C. Directional Flow Arrows: Arrows shall be used to indicate direction of flow in pipes, including pipes where flow is allowed in both directions.
- D. Pipe Label Color Schedule:
 - 1. Chilled-Water Piping: White letters on a safety-green background.
 - 2. Condenser-Water Piping: White letters on a safety-green background.
 - 3. Heating Water Piping: White letters on a safety-green background.
 - 4. Refrigerant Piping: Black letters on a safety-orange background.
 - 5. Low-Pressure Steam Piping: Black letters on a safety-white background.
 - 6. High-Pressure Steam Piping: Black letters on a safety-white background.
 - 7. Steam Condensate Piping: Black letters on a safety-white background.

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3.5 DUCT LABEL INSTALLATION

- A. Install self-adhesive duct labels with permanent adhesive on air ducts in the following color codes:
 - 1. Blue: For cold-air supply ducts.
 - 2. Yellow: For hot-air supply ducts.
 - 3. Green: For exhaust-, outside-, relief-, return-, and mixed-air ducts.
- B. Locate labels near points where ducts enter into and exit from concealed spaces and at maximum intervals of 50 feet in each space where ducts are exposed or concealed by removable ceiling system.

3.6 VALVE-TAG INSTALLATION

- A. Install tags on valves and control devices in piping systems, except check valves, valves within factory-fabricated equipment units, shutoff valves, faucets, convenience and lawn-watering hose connections, and HVAC terminal devices and similar roughing-in connections of end-use fixtures and units. List tagged valves in a valve schedule.
- B. Valve-Tag Application Schedule: Tag valves according to size, shape, and color scheme and with captions similar to those indicated in the following subparagraphs:
 - 1. Valve-Tag Size and Shape:
 - a. Chilled Water: 2 inches, square.
 - b. Condenser Water: 2 inches, square.
 - c. Refrigerant: 2 inches, square.
 - d. Hot Water: 2 inches, square.
 - e. Gas: 2 inches, square.
 - f. Low-Pressure Steam: 2 inches, square.
 - g. High-Pressure Steam: 2 inches, square.
 - h. Steam Condensate: 2 inches, square.
 - 2. Valve-Tag Colors:
 - a. Toxic and Corrosive Fluids: Black letters on a safety-orange background.
 - b. Flammable Fluids: Black letters on a safety-yellow background.
 - c. Combustible Fluids: White letters on a safety-brown background.
 - d. Potable and Other Water: White letters on a safety-green background.
 - e. Compressed Air: White letters on a safety-blue background.
 - f. Defined by User: White letters on a safety-purple background, black letters on a safety-white background, white letters on a safety-gray background, and white letters on a safety-black background

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3.7 WARNING-TAG INSTALLATION

- A. Write required message on, and attach warning tags to, equipment and other items where required.

END OF SECTION 230553

SECTION 230593
TESTING, ADJUSTING, AND BALANCING FOR HVAC

PART 1 - GENERAL

1.1 RELATED DOCUMENTS

- A. Drawings and general provisions of the Contract, including General and Supplementary Conditions and Division 01 Specification Sections, apply to this Section.

1.2 SUMMARY

A. Section Includes:

1. Balancing Air Systems:
 - a. Constant-volume air systems.
 - b. Multizone systems.
2. Balancing Hydronic Piping Systems:
 - a. Constant-flow hydronic systems.
 - b. Variable-flow hydronic systems.
 - c. Primary-secondary hydronic systems.
3. Balancing steam systems.
4. Testing, Adjusting, and Balancing Equipment:
 - a. Heat exchangers.
 - b. Motors.
 - c. Condensing units.
 - d. Boilers.
 - e. Heat-transfer coils.
5. Testing, adjusting, and balancing existing systems and equipment.
6. Sound tests.
7. Vibration tests.
8. Duct leakage tests.
9. Control system verification.

1.3 DEFINITIONS

- A. AABC: Associated Air Balance Council.
- B. BAS: Building automation systems.
- C. NEBB: National Environmental Balancing Bureau.
- D. TAB: Testing, adjusting, and balancing.

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- E. TABB: Testing, Adjusting, and Balancing Bureau.
- F. TAB Specialist: An independent entity meeting qualifications to perform TAB work.
- G. TDH: Total dynamic head.

1.4 INFORMATIONAL SUBMITTALS

- A. Qualification Data: Within 30 days of Contractor's Notice to Proceed, submit documentation that the TAB specialist and this Project's TAB team members meet the qualifications specified in "Quality Assurance" Article.
- B. Contract Documents Examination Report: Within 30 days of Contractor's Notice to Proceed, submit the Contract Documents review report as specified in Part 3.
- C. Strategies and Procedures Plan: Within 30 days of Contractor's Notice to Proceed, submit TAB strategies and step-by-step procedures as specified in "Preparation" Article.
- D. System Readiness Checklists: Within 30 days of Contractor's Notice to Proceed, submit system readiness checklists as specified in "Preparation" Article.
- E. Examination Report: Submit a summary report of the examination review required in "Examination" Article.
- F. Certified TAB reports.
- G. Sample report forms.
- H. Instrument calibration reports, to include the following:
 - 1. Instrument type and make.
 - 2. Serial number.
 - 3. Application.
 - 4. Dates of use.
 - 5. Dates of calibration.

1.5 QUALITY ASSURANCE

- A. TAB Specialists Qualifications: Certified by AABC.
 - 1. TAB Field Supervisor: Employee of the TAB specialist and certified by AABC.
 - 2. TAB Technician: Employee of the TAB specialist and certified by AABC as a TAB technician.
- B. Instrumentation Type, Quantity, Accuracy, and Calibration: Comply with requirements in ASHRAE 111, Section 4, "Instrumentation."

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1.6 FIELD CONDITIONS

- A. Full Owner Occupancy: Owner will occupy the site and existing building during entire TAB period. Cooperate with Owner during TAB operations to minimize conflicts with Owner's operations.

PART 2 - PRODUCTS (Not Applicable)

PART 3 - EXECUTION

3.1 EXAMINATION

- A. Examine the Contract Documents to become familiar with Project requirements and to discover conditions in systems designs that may preclude proper TAB of systems and equipment.
- B. Examine installed systems for balancing devices, such as test ports, gage cocks, thermometer wells, flow-control devices, balancing valves and fittings, and manual volume dampers. Verify that locations of these balancing devices are applicable for intended purpose and are accessible.
- C. Examine the approved submittals for HVAC systems and equipment.
- D. Examine design data including HVAC system descriptions, statements of design assumptions for environmental conditions and systems output, and statements of philosophies and assumptions about HVAC system and equipment controls.
- E. Examine ceiling plenums and underfloor air plenums used for supply, return, or relief air to verify that they are properly separated from adjacent areas. Verify that penetrations in plenum walls are sealed and fire-stopped if required.
- F. Examine equipment performance data including fan and pump curves.
 - 1. Relate performance data to Project conditions and requirements, including system effects that can create undesired or unpredicted conditions that cause reduced capacities in all or part of a system.
 - 2. Calculate system-effect factors to reduce performance ratings of HVAC equipment when installed under conditions different from the conditions used to rate equipment performance. To calculate system effects for air systems, use tables and charts found in AMCA 201, "Fans and Systems," or in SMACNA's "HVAC Systems - Duct Design." Compare results with the design data and installed conditions.
- G. Examine system and equipment installations and verify that field quality-control testing, cleaning, and adjusting specified in individual Sections have been performed.
- H. Examine test reports specified in individual system and equipment Sections.
- I. Examine HVAC equipment and verify that bearings are greased, belts are aligned and tight, filters are clean, and equipment with functioning controls is ready for operation.

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- J. Examine terminal units and verify that they are accessible and their controls are connected and functioning.
- K. Examine strainers. Verify that startup screens have been replaced by permanent screens with indicated perforations.
- L. Examine control valves for proper installation for their intended function of throttling, diverting, or mixing fluid flows.
- M. Examine heat-transfer coils for correct piping connections and for clean and straight fins.
- N. Examine system pumps to ensure absence of entrained air in the suction piping.
- O. Examine operating safety interlocks and controls on HVAC equipment.
- P. Report deficiencies discovered before and during performance of TAB procedures. Observe and record system reactions to changes in conditions. Record default set points if different from indicated values.

3.2 PREPARATION

- A. Prepare a TAB plan that includes the following:
 - 1. Equipment and systems to be tested.
 - 2. Strategies and step-by-step procedures for balancing the systems.
 - 3. Instrumentation to be used.
 - 4. Sample forms with specific identification for all equipment.
- B. Perform system-readiness checks of HVAC systems and equipment to verify system readiness for TAB work. Include, at a minimum, the following:
 - 1. Airside:
 - a. Verify that leakage and pressure tests on air distribution systems have been satisfactorily completed.
 - b. Duct systems are complete with terminals installed.
 - c. Volume, smoke, and fire dampers are open and functional.
 - d. Clean filters are installed.
 - e. Fans are operating, free of vibration, and rotating in correct direction.
 - f. Variable-frequency controllers' startup is complete and safeties are verified.
 - g. Automatic temperature-control systems are operational.
 - h. Ceilings are installed.
 - i. Windows and doors are installed.
 - j. Suitable access to balancing devices and equipment is provided.
 - 2. Hydronics:
 - a. Verify leakage and pressure tests on water distribution systems have been satisfactorily completed.

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- b. Piping is complete with terminals installed.
- c. Water treatment is complete.
- d. Systems are flushed, filled, and air purged.
- e. Strainers are pulled and cleaned.
- f. Control valves are functioning per the sequence of operation.
- g. Shutoff and balance valves have been verified to be 100 percent open.
- h. Pumps are started and proper rotation is verified.
- i. Pump gage connections are installed directly at pump inlet and outlet flanges or in discharge and suction pipe prior to valves or strainers.
- j. Variable-frequency controllers' startup is complete and safeties are verified.
- k. Suitable access to balancing devices and equipment is provided.

3.3 GENERAL PROCEDURES FOR TESTING AND BALANCING

- A. Perform testing and balancing procedures on each system according to the procedures contained in SMACNA's "HVAC Systems - Testing, Adjusting, and Balancing" and in this Section.
- B. Cut insulation, ducts, pipes, and equipment cabinets for installation of test probes to the minimum extent necessary for TAB procedures.
 - 1. After testing and balancing, patch probe holes in ducts with same material and thickness as used to construct ducts.
 - 2. Install and join new insulation that matches removed materials. Restore insulation, coverings, vapor barrier, and finish.
- C. Mark equipment and balancing devices, including damper-control positions, valve position indicators, fan-speed-control levers, and similar controls and devices, with paint or other suitable, permanent identification material to show final settings.
- D. Take and report testing and balancing measurements in inch-pound (IP) units.

3.4 GENERAL PROCEDURES FOR BALANCING AIR SYSTEMS

- A. Prepare test reports for both fans and outlets. Obtain manufacturer's outlet factors and recommended testing procedures. Cross-check the summation of required outlet volumes with required fan volumes.
- B. Prepare schematic diagrams of systems' "as-built" duct layouts.
- C. Determine the best locations in main and branch ducts for accurate duct-airflow measurements.
- D. Check airflow patterns from the outdoor-air louvers and dampers and the return- and exhaust-air dampers through the supply-fan discharge and mixing dampers.
- E. Locate start-stop and disconnect switches, electrical interlocks, and motor starters.
- F. Verify that motor starters are equipped with properly sized thermal protection.

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- G. Check dampers for proper position to achieve desired airflow path.
- H. Check for airflow blockages.
- I. Check condensate drains for proper connections and functioning.
- J. Check for proper sealing of air-handling-unit components.
- K. Verify that air duct system is sealed as specified in Section 233113 "Metal Ducts."

3.5 PROCEDURES FOR MULTIZONE SYSTEMS

- A. Position the unit's automatic zone dampers for maximum flow through the cooling coil.
- B. The procedures for multizone systems will utilize the zone balancing dampers to achieve the indicated airflow within the zone.
- C. After balancing, place the unit's automatic zone dampers for maximum heating flow. Retest zone airflows and record any variances.
- D. Adjust fans to deliver total indicated airflows within the maximum allowable fan speed listed by fan manufacturer.
 - 1. Measure total airflow.
 - a. Set outside-air, return-air and relief-air dampers for proper position that simulates minimum outdoor air conditions.
 - b. Where duct conditions allow, measure airflow by Pitot-tube traverse. If necessary, perform multiple Pitot-tube traverses to obtain total airflow.
 - c. Where duct conditions are not suitable for Pitot-tube traverse measurements, a coil traverse may be acceptable.
 - d. If a reliable Pitot-tube traverse or coil traverse is not possible, measure airflow at terminals and calculate the total airflow.
 - 2. Measure fan static pressures as follows:
 - a. Measure static pressure directly at the fan outlet or through the flexible connection.
 - b. Measure static pressure directly at the fan inlet or through the flexible connection.
 - c. Measure static pressure across each component that makes up the air-handling system.
 - d. Report artificial loading of filters at the time static pressures are measured.
 - 3. Review Record Documents to determine variations in design static pressures versus actual static pressures. Calculate actual system-effect factors. Recommend adjustments to accommodate actual conditions.
 - 4. Obtain approval from Owner for adjustment of fan speed higher or lower than indicated speed. Comply with requirements in HVAC Sections for air-handling units for

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- adjustment of fans, belts, and pulley sizes to achieve indicated air-handling-unit performance.
5. Do not make fan-speed adjustments that result in motor overload. Consult equipment manufacturers about fan-speed safety factors. Modulate dampers and measure fan-motor amperage to ensure that no overload occurs. Measure amperage in full-cooling, full-heating, economizer, and any other operating mode to determine the maximum required brake horsepower.
- E. Adjust volume dampers for main duct, submain ducts, and major branch ducts to indicated airflows.
1. Measure airflow of submain and branch ducts.
 2. Adjust submain and branch duct volume dampers for specified airflow.
 3. Re-measure each submain and branch duct after all have been adjusted.
- F. Adjust air inlets and outlets for each space to indicated airflows.
1. Set airflow patterns of adjustable outlets for proper distribution without drafts.
 2. Measure inlets and outlets airflow.
 3. Adjust each inlet and outlet for specified airflow.
 4. Re-measure each inlet and outlet after they have been adjusted.
- G. Verify final system conditions.
1. Re-measure and confirm that minimum outdoor, return, and relief airflows are within design. Readjust to match design if necessary.
 2. Re-measure and confirm that total airflow is within design.
 3. Re-measure all final fan operating data, rpms, volts, amps, and static profile.
 4. Mark all final settings.
 5. Test system in economizer mode. Verify proper operation and adjust if necessary.
 6. Measure and record all operating data.
 7. Record final fan-performance data.

3.6 GENERAL PROCEDURES FOR HYDRONIC SYSTEMS

- A. Prepare test reports for pumps, coils, and heat exchangers. Obtain approved submittals and manufacturer-recommended testing procedures. Crosscheck the summation of required coil and heat exchanger flow rates with pump design flow rate.
- B. Prepare schematic diagrams of systems' "as-built" piping layouts.
- C. In addition to requirements in "Preparation" Article, prepare hydronic systems for testing and balancing as follows:
1. Check liquid level in expansion tank.
 2. Check highest vent for adequate pressure.
 3. Check flow-control valves for proper position.
 4. Locate start-stop and disconnect switches, electrical interlocks, and motor starters.
 5. Verify that motor starters are equipped with properly sized thermal protection.

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6. Check that air has been purged from the system.

3.7 PROCEDURES FOR CONSTANT-FLOW HYDRONIC SYSTEMS

A. Adjust pumps to deliver total design gpm.

1. Measure total water flow.
 - a. Position valves for full flow through coils.
 - b. Measure flow by main flow meter, if installed.
 - c. If main flow meter is not installed, determine flow by pump TDH or exchanger pressure drop.
2. Measure pump TDH as follows:
 - a. Measure discharge pressure directly at the pump outlet flange or in discharge pipe prior to any valves.
 - b. Measure inlet pressure directly at the pump inlet flange or in suction pipe prior to any valves or strainers.
 - c. Convert pressure to head and correct for differences in gage heights.
 - d. Verify pump impeller size by measuring the TDH with the discharge valve closed. Note the point on manufacturer's pump curve at zero flow, and verify that the pump has the intended impeller size.
 - e. With valves open, read pump TDH. Adjust pump discharge valve until design water flow is achieved.
3. Monitor motor performance during procedures and do not operate motor in an overloaded condition.

B. Adjust flow-measuring devices installed in mains and branches to design water flows.

1. Measure flow in main and branch pipes.
2. Adjust main and branch balance valves for design flow.
3. Re-measure each main and branch after all have been adjusted.

C. Adjust flow-measuring devices installed at terminals for each space to design water flows.

1. Measure flow at terminals.
2. Adjust each terminal to design flow.
3. Re-measure each terminal after it is adjusted.
4. Position control valves to bypass the coil, and adjust the bypass valve to maintain design flow.
5. Perform temperature tests after flows have been balanced.

D. For systems with pressure-independent valves at terminals:

1. Measure differential pressure and verify that it is within manufacturer's specified range.
2. Perform temperature tests after flows have been verified.

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- E. For systems without pressure-independent valves or flow-measuring devices at terminals:
 - 1. Measure and balance coils by either coil pressure drop or temperature method.
 - 2. If balanced by coil pressure drop, perform temperature tests after flows have been verified.
- F. Verify final system conditions as follows:
 - 1. Re-measure and confirm that total water flow is within design.
 - 2. Re-measure final pumps' operating data, TDH, volts, amps, and static profile.
 - 3. Mark final settings.
- G. Verify that memory stops have been set.

3.8 PROCEDURES FOR VARIABLE-FLOW HYDRONIC SYSTEMS

- A. Balance systems with automatic two- and three-way control valves by setting systems at maximum flow through heat-exchange terminals, and proceed as specified above for hydronic systems.
- B. Adjust the variable-flow hydronic system as follows:
 - 1. Verify that the differential-pressure sensor is located as indicated.
 - 2. Determine whether there is diversity in the system.
- C. For systems with no diversity:
 - 1. Adjust pumps to deliver total design gpm.
 - a. Measure total water flow.
 - 1) Position valves for full flow through coils.
 - 2) Measure flow by main flow meter, if installed.
 - 3) If main flow meter is not installed, determine flow by pump TDH or exchanger pressure drop.
 - b. Measure pump TDH as follows:
 - 1) Measure discharge pressure directly at the pump outlet flange or in discharge pipe prior to any valves.
 - 2) Measure inlet pressure directly at the pump inlet flange or in suction pipe prior to any valves or strainers.
 - 3) Convert pressure to head and correct for differences in gage heights.
 - 4) Verify pump impeller size by measuring the TDH with the discharge valve closed. Note the point on manufacturer's pump curve at zero flow and verify that the pump has the intended impeller size.
 - 5) With valves open, read pump TDH. Adjust pump discharge valve until design water flow is achieved.

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- c. Monitor motor performance during procedures and do not operate motor in an overloaded condition.
 - 2. Adjust flow-measuring devices installed in mains and branches to design water flows.
 - a. Measure flow in main and branch pipes.
 - b. Adjust main and branch balance valves for design flow.
 - c. Re-measure each main and branch after all have been adjusted.
 - 3. Adjust flow-measuring devices installed at terminals for each space to design water flows.
 - a. Measure flow at terminals.
 - b. Adjust each terminal to design flow.
 - c. Re-measure each terminal after it is adjusted.
 - d. Position control valves to bypass the coil and adjust the bypass valve to maintain design flow.
 - e. Perform temperature tests after flows have been balanced.
 - 4. For systems with pressure-independent valves at terminals:
 - a. Measure differential pressure and verify that it is within manufacturer's specified range.
 - b. Perform temperature tests after flows have been verified.
 - 5. For systems without pressure-independent valves or flow-measuring devices at terminals:
 - a. Measure and balance coils by either coil pressure drop or temperature method.
 - b. If balanced by coil pressure drop, perform temperature tests after flows have been verified.
 - 6. Prior to verifying final system conditions, determine the system differential-pressure set point.
 - 7. If the pump discharge valve was used to set total system flow with variable-frequency controller at 60 Hz, at completion open discharge valve 100 percent and allow variable-frequency controller to control system differential-pressure set point. Record pump data under both conditions.
 - 8. Mark final settings and verify that all memory stops have been set.
 - 9. Verify final system conditions as follows:
 - a. Re-measure and confirm that total water flow is within design.
 - b. Re-measure final pumps' operating data, TDH, volts, amps, and static profile.
 - c. Mark final settings.
 - 10. Verify that memory stops have been set.
- D. For systems with diversity:
- 1. Determine diversity factor.

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2. Simulate system diversity by closing required number of control valves, as approved by the design engineer.
3. Adjust pumps to deliver total design gpm.
 - a. Measure total water flow.
 - 1) Position valves for full flow through coils.
 - 2) Measure flow by main flow meter, if installed.
 - 3) If main flow meter is not installed, determine flow by pump TDH or exchanger pressure drop.
 - b. Measure pump TDH as follows:
 - 1) Measure discharge pressure directly at the pump outlet flange or in discharge pipe prior to any valves.
 - 2) Measure inlet pressure directly at the pump inlet flange or in suction pipe prior to any valves or strainers.
 - 3) Convert pressure to head and correct for differences in gage heights.
 - 4) Verify pump impeller size by measuring the TDH with the discharge valve closed. Note the point on manufacturer's pump curve at zero flow and verify that the pump has the intended impeller size.
 - 5) With valves open, read pump TDH. Adjust pump discharge valve until design water flow is achieved.
 - c. Monitor motor performance during procedures and do not operate motor in an overloaded condition.
4. Adjust flow-measuring devices installed in mains and branches to design water flows.
 - a. Measure flow in main and branch pipes.
 - b. Adjust main and branch balance valves for design flow.
 - c. Re-measure each main and branch after all have been adjusted.
5. Adjust flow-measuring devices installed at terminals for each space to design water flows.
 - a. Measure flow at terminals.
 - b. Adjust each terminal to design flow.
 - c. Re-measure each terminal after it is adjusted.
 - d. Position control valves to bypass the coil, and adjust the bypass valve to maintain design flow.
 - e. Perform temperature tests after flows have been balanced.
6. For systems with pressure-independent valves at terminals:
 - a. Measure differential pressure, and verify that it is within manufacturer's specified range.
 - b. Perform temperature tests after flows have been verified.
7. For systems without pressure-independent valves or flow-measuring devices at terminals:

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- a. Measure and balance coils by either coil pressure drop or temperature method.
 - b. If balanced by coil pressure drop, perform temperature tests after flows have been verified.
8. Open control valves that were shut. Close a sufficient number of control valves that were previously open to maintain diversity, and balance terminals that were just opened.
 9. Prior to verifying final system conditions, determine system differential-pressure set point.
 10. If the pump discharge valve was used to set total system flow with variable-frequency controller at 60 Hz, at completion open discharge valve 100 percent and allow variable-frequency controller to control system differential-pressure set point. Record pump data under both conditions.
 11. Mark final settings and verify that memory stops have been set.
 12. Verify final system conditions as follows:
 - a. Re-measure and confirm that total water flow is within design.
 - b. Re-measure final pumps' operating data, TDH, volts, amps, and static profile.
 - c. Mark final settings.
 13. Verify that memory stops have been set.

3.9 PROCEDURES FOR MOTORS

- A. Motors 1/2 HP and Larger: Test at final balanced conditions and record the following data:
 1. Manufacturer's name, model number, and serial number.
 2. Motor horsepower rating.
 3. Motor rpm.
 4. Phase and hertz.
 5. Nameplate and measured voltage, each phase.
 6. Nameplate and measured amperage, each phase.
 7. Starter size and thermal-protection-element rating.
 8. Service factor and frame size.
- B. Motors Driven by Variable-Frequency Controllers: Test manual bypass of controller to prove proper operation.

3.10 PROCEDURES FOR CONDENSING UNITS

- A. Verify proper rotation of fans.
- B. Measure entering- and leaving-air temperatures.
- C. Record fan and motor operating data.

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3.11 PROCEDURES FOR BOILERS

A. Hydronic Boilers:

1. Measure and record entering- and leaving-water temperatures.
2. Measure and record water flow.
3. Record relief valve pressure setting.

3.12 PROCEDURES FOR HEAT-TRANSFER COILS

A. Measure, adjust, and record the following data for each water coil:

1. Entering- and leaving-water temperature.
2. Water flow rate.
3. Water pressure drop for major (more than 20 gpm) equipment coils, excluding unitary equipment such as reheat coils, unit heaters, and fan-coil units.
4. Dry-bulb temperature of entering and leaving air.
5. Wet-bulb temperature of entering and leaving air for cooling coils.
6. Airflow.

B. Measure, adjust, and record the following data for each electric heating coil:

1. Nameplate data.
2. Airflow.
3. Entering- and leaving-air temperature at full load.
4. Voltage and amperage input of each phase at full load.
5. Calculated kilowatt at full load.
6. Fuse or circuit-breaker rating for overload protection.

C. Measure, adjust, and record the following data for each steam coil:

1. Dry-bulb temperature of entering and leaving air.
2. Airflow.
3. Inlet steam pressure.

D. Measure, adjust, and record the following data for each refrigerant coil:

1. Dry-bulb temperature of entering and leaving air.
2. Wet-bulb temperature of entering and leaving air.
3. Airflow.

3.13 SOUND TESTS

A. After the systems are balanced and construction is Substantially Complete, measure and record sound levels at 5 locations as designated by the Owner.

B. Instrumentation:

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1. The sound-testing meter shall be a portable, general-purpose testing meter consisting of a microphone, processing unit, and readout.
2. The sound-testing meter shall be capable of showing fluctuations at minimum and maximum levels, and measuring the equivalent continuous sound pressure level (LEQ).
3. The sound-testing meter must be capable of using 1/3 octave band filters to measure mid-frequencies from 31.5 Hz to 8000 Hz.
4. The accuracy of the sound-testing meter shall be plus or minus one decibel.

C. Test Procedures:

1. Perform test at quietest background noise period. Note cause of unpreventable sound that affects test outcome.
2. Equipment should be operating at design values.
3. Calibrate the sound-testing meter prior to taking measurements.
4. Use a microphone suitable for the type of noise levels measured that is compatible with meter. Provide a windshield for outside or in-duct measurements.
5. Record a set of background measurements in dBA and sound pressure levels in the eight un-weighted octave bands 63 Hz to 8000 Hz (NC) with the equipment off.
6. Take sound readings in dBA and sound pressure levels in the eight un-weighted octave bands 63 Hz to 8000 Hz (NC) with the equipment operating.
7. Take readings no closer than 36 inches from a wall or from the operating equipment and approximately 60 inches from the floor, with the meter held or mounted on a tripod.
8. For outdoor measurements, move sound-testing meter slowly and scan area that has the most exposure to noise source being tested. Use A-weighted scale for this type of reading.

D. Reporting:

1. Report shall record the following:
 - a. Location.
 - b. System tested.
 - c. dBA reading.
 - d. Sound pressure level in each octave band with equipment on and off.
2. Plot sound pressure levels on NC worksheet with equipment on and off.

3.14 VIBRATION TESTS

- A. After systems are balanced and construction is Substantially Complete, measure and record vibration levels on equipment having motor horsepower equal to or greater than 10.
- B. Instrumentation:
 1. Use portable, battery-operated, and microprocessor-controlled vibration meter with or without a built-in printer.
 2. The meter shall automatically identify engineering units, filter bandwidth, amplitude, and frequency scale values.

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3. The meter shall be able to measure machine vibration displacement in mils of deflection, velocity in inches per second, and acceleration in inches per second squared.
4. Verify calibration date is current for vibration meter before taking readings.

C. Test Procedures:

1. To ensure accurate readings, verify that accelerometer has a clean, flat surface and is mounted properly.
2. With the unit running, set up vibration meter in a safe, secure location. Connect transducer to meter with proper cables. Hold magnetic tip of transducer on top of the bearing, and measure unit in mils of deflection. Record measurement, then move transducer to the side of the bearing and record in mils of deflection. Record an axial reading in mils of deflection by holding nonmagnetic, pointed transducer tip on end of shaft.
3. Change vibration meter to velocity (inches per second) measurements. Repeat and record above measurements.
4. Record CPM or rpm.
5. Read each bearing on motor, fan, and pump as required. Track and record vibration levels from rotating component through casing to base.

D. Reporting:

1. Report shall record location and the system tested.
2. Include horizontal-vertical-axial measurements for tests.
3. Verify that vibration limits follow Specifications, or, if not specified, follow the General Machinery Vibration Severity Chart or Vibration Acceleration General Severity Chart from the AABC National Standards. Acceptable levels of vibration are normally "smooth" to "good."
4. Include in report General Machinery Vibration Severity Chart, with conditions plotted.

3.15 DUCT LEAKAGE TESTS

- A. Witness the duct pressure testing performed by Installer.
- B. Verify that proper test methods are used and that leakage rates are within specified tolerances.
- C. Report deficiencies observed.

3.16 CONTROLS VERIFICATION

- A. In conjunction with system balancing, perform the following:
 1. Verify temperature control system is operating within the design limitations.
 2. Confirm that the sequences of operation are in compliance with Contract Documents.
 3. Verify that controllers are calibrated and function as intended.
 4. Verify that controller set points are as indicated.
 5. Verify the operation of lockout or interlock systems.
 6. Verify the operation of valve and damper actuators.

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7. Verify that controlled devices are properly installed and connected to correct controller.
8. Verify that controlled devices travel freely and are in position indicated by controller: open, closed, or modulating.
9. Verify location and installation of sensors to ensure that they sense only intended temperature, humidity, or pressure.

- B. Reporting: Include a summary of verifications performed, remaining deficiencies, and variations from indicated conditions.

3.17 PROCEDURES FOR TESTING, ADJUSTING, AND BALANCING EXISTING SYSTEMS

- A. Perform a preconstruction inspection of existing equipment that is to remain and be reused.
1. Measure and record the operating speed, airflow, and static pressure of each fan.
 2. Measure motor voltage and amperage. Compare the values to motor nameplate information.
 3. Check the refrigerant charge.
 4. Check the condition of filters.
 5. Check the condition of coils.
 6. Check the operation of the drain pan and condensate-drain trap.
 7. Check bearings and other lubricated parts for proper lubrication.
 8. Report on the operating condition of the equipment and the results of the measurements taken. Report deficiencies.
- B. Before performing testing and balancing of existing systems, inspect existing equipment that is to remain and be reused to verify that existing equipment has been cleaned and refurbished. Verify the following:
1. New filters are installed.
 2. Coils are clean and fins combed.
 3. Drain pans are clean.
 4. Fans are clean.
 5. Bearings and other parts are properly lubricated.
 6. Deficiencies noted in the preconstruction report are corrected.
- C. Perform testing and balancing of existing systems to the extent that existing systems are affected by the renovation work.
1. Compare the indicated airflow of the renovated work to the measured fan airflows, and determine the new fan speed and the face velocity of filters and coils.
 2. Verify that the indicated airflows of the renovated work result in filter and coil face velocities and fan speeds that are within the acceptable limits defined by equipment manufacturer.
 3. If calculations increase or decrease the airflow rates and water flow rates by more than 5 percent, make equipment adjustments to achieve the calculated rates. If increase or decrease is 5 percent or less, equipment adjustments are not required.
 4. Balance each air outlet.

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3.18 TOLERANCES

- A. Set HVAC system's airflow rates and water flow rates within the following tolerances:
 - 1. Supply, Return, and Exhaust Fans and Equipment with Fans: Plus or minus 10 percent.
 - 2. Air Outlets and Inlets: Plus or minus 10 percent.
 - 3. Heating-Water Flow Rate: Plus or minus 10 percent.
 - 4. Cooling-Water Flow Rate: Plus or minus 10 percent.
- B. Maintaining pressure relationships as designed shall have priority over the tolerances specified above.

3.19 PROGRESS REPORTING

- A. Initial Construction-Phase Report: Based on examination of the Contract Documents as specified in "Examination" Article, prepare a report on the adequacy of design for systems balancing devices. Recommend changes and additions to systems balancing devices to facilitate proper performance measuring and balancing. Recommend changes and additions to HVAC systems and general construction to allow access for performance measuring and balancing devices.
- B. Status Reports: Prepare biweekly progress reports to describe completed procedures, procedures in progress, and scheduled procedures. Include a list of deficiencies and problems found in systems being tested and balanced. Prepare a separate report for each system and each building floor for systems serving multiple floors.

3.20 FINAL REPORT

- A. General: Prepare a certified written report; tabulate and divide the report into separate sections for tested systems and balanced systems.
 - 1. Include a certification sheet at the front of the report's binder, signed and sealed by the certified testing and balancing engineer.
 - 2. Include a list of instruments used for procedures, along with proof of calibration.
 - 3. Certify validity and accuracy of field data.
- B. Final Report Contents: In addition to certified field-report data, include the following:
 - 1. Pump curves.
 - 2. Fan curves.
 - 3. Manufacturers' test data.
 - 4. Field test reports prepared by system and equipment installers.
 - 5. Other information relative to equipment performance; do not include Shop Drawings and Product Data.
- C. General Report Data: In addition to form titles and entries, include the following data:
 - 1. Title page.

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2. Name and address of the TAB specialist.
 3. Project name.
 4. Project location.
 5. Architect's name and address.
 6. Engineer's name and address.
 7. Contractor's name and address.
 8. Report date.
 9. Signature of TAB supervisor who certifies the report.
 10. Table of Contents with the total number of pages defined for each section of the report. Number each page in the report.
 11. Summary of contents including the following:
 - a. Indicated versus final performance.
 - b. Notable characteristics of systems.
 - c. Description of system operation sequence if it varies from the Contract Documents.
 12. Nomenclature sheets for each item of equipment.
 13. Data for terminal units, including manufacturer's name, type, size, and fittings.
 14. Notes to explain why certain final data in the body of reports vary from indicated values.
 15. Test conditions for fans and pump performance forms including the following:
 - a. Settings for outdoor-, return-, and exhaust-air dampers.
 - b. Conditions of filters.
 - c. Cooling coil, wet- and dry-bulb conditions.
 - d. Face and bypass damper settings at coils.
 - e. Fan drive settings including settings and percentage of maximum pitch diameter.
 - f. Inlet vane settings for variable-air-volume systems.
 - g. Settings for supply-air, static-pressure controller.
 - h. Other system operating conditions that affect performance.
- D. System Diagrams: Include schematic layouts of air and hydronic distribution systems. Present each system with single-line diagram and include the following:
1. Quantities of outdoor, supply, return, and exhaust airflows.
 2. Water and steam flow rates.
 3. Duct, outlet, and inlet sizes.
 4. Pipe and valve sizes and locations.
 5. Terminal units.
 6. Balancing stations.
 7. Position of balancing devices.
- E. Air-Handling-Unit Test Reports: For air-handling units with coils, include the following:
1. Unit Data:
 - a. Unit identification.
 - b. Location.
 - c. Make and type.
 - d. Model number and unit size.

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- e. Manufacturer's serial number.
 - f. Unit arrangement and class.
 - g. Discharge arrangement.
 - h. Sheave make, size in inches, and bore.
 - i. Center-to-center dimensions of sheave and amount of adjustments in inches.
 - j. Number, make, and size of belts.
 - k. Number, type, and size of filters.
2. Motor Data:
- a. Motor make, and frame type and size.
 - b. Horsepower and rpm.
 - c. Volts, phase, and hertz.
 - d. Full-load amperage and service factor.
 - e. Sheave make, size in inches, and bore.
 - f. Center-to-center dimensions of sheave and amount of adjustments in inches.
3. Test Data (Indicated and Actual Values):
- a. Total airflow rate in cfm.
 - b. Total system static pressure in inches wg.
 - c. Fan rpm.
 - d. Discharge static pressure in inches wg.
 - e. Filter static-pressure differential in inches wg.
 - f. Preheat-coil static-pressure differential in inches wg.
 - g. Cooling-coil static-pressure differential in inches wg.
 - h. Heating-coil static-pressure differential in inches wg.
 - i. Outdoor airflow in cfm.
 - j. Return airflow in cfm.
 - k. Outdoor-air damper position.
 - l. Return-air damper position.
 - m. Vortex damper position.
- F. Apparatus-Coil Test Reports:
1. Coil Data:
- a. System identification.
 - b. Location.
 - c. Coil type.
 - d. Number of rows.
 - e. Fin spacing in fins per inch o.c.
 - f. Make and model number.
 - g. Face area in sq. ft..
 - h. Tube size in NPS.
 - i. Tube and fin materials.
 - j. Circuiting arrangement.
2. Test Data (Indicated and Actual Values):

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- a. Airflow rate in cfm.
 - b. Average face velocity in fpm.
 - c. Air pressure drop in inches wg.
 - d. Outdoor-air, wet- and dry-bulb temperatures in deg F.
 - e. Return-air, wet- and dry-bulb temperatures in deg F.
 - f. Entering-air, wet- and dry-bulb temperatures in deg F.
 - g. Leaving-air, wet- and dry-bulb temperatures in deg F.
 - h. Water flow rate in gpm.
 - i. Water pressure differential in feet of head or psig.
 - j. Entering-water temperature in deg F.
 - k. Leaving-water temperature in deg F.
 - l. Refrigerant expansion valve and refrigerant types.
 - m. Refrigerant suction pressure in psig.
 - n. Refrigerant suction temperature in deg F.
 - o. Inlet steam pressure in psig.
- G. Gas- and Oil-Fired Heat Apparatus Test Reports: In addition to manufacturer's factory startup equipment reports, include the following:
- 1. Unit Data:
 - a. System identification.
 - b. Location.
 - c. Make and type.
 - d. Model number and unit size.
 - e. Manufacturer's serial number.
 - f. Fuel type in input data.
 - g. Output capacity in Btu/h.
 - h. Ignition type.
 - i. Burner-control types.
 - j. Motor horsepower and rpm.
 - k. Motor volts, phase, and hertz.
 - l. Motor full-load amperage and service factor.
 - m. Sheave make, size in inches, and bore.
 - n. Center-to-center dimensions of sheave and amount of adjustments in inches.
 - 2. Test Data (Indicated and Actual Values):
 - a. Total airflow rate in cfm.
 - b. Entering-air temperature in deg F.
 - c. Leaving-air temperature in deg F.
 - d. Air temperature differential in deg F.
 - e. Entering-air static pressure in inches wg.
 - f. Leaving-air static pressure in inches wg.
 - g. Air static-pressure differential in inches wg.
 - h. Low-fire fuel input in Btu/h.
 - i. High-fire fuel input in Btu/h.
 - j. Manifold pressure in psig.
 - k. High-temperature-limit setting in deg F.
 - l. Operating set point in Btu/h.

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- m. Motor voltage at each connection.
 - n. Motor amperage for each phase.
 - o. Heating value of fuel in Btu/h.
- H. Electric-Coil Test Reports: For electric furnaces, duct coils, and electric coils installed in central-station air-handling units, include the following:
 - 1. Unit Data:
 - a. System identification.
 - b. Location.
 - c. Coil identification.
 - d. Capacity in Btu/h.
 - e. Number of stages.
 - f. Connected volts, phase, and hertz.
 - g. Rated amperage.
 - h. Airflow rate in cfm.
 - i. Face area in sq. ft..
 - j. Minimum face velocity in fpm.
 - 2. Test Data (Indicated and Actual Values):
 - a. Heat output in Btu/h.
 - b. Airflow rate in cfm.
 - c. Air velocity in fpm.
 - d. Entering-air temperature in deg F.
 - e. Leaving-air temperature in deg F.
 - f. Voltage at each connection.
 - g. Amperage for each phase.
- I. Fan Test Reports: For supply, return, and exhaust fans, include the following:
 - 1. Fan Data:
 - a. System identification.
 - b. Location.
 - c. Make and type.
 - d. Model number and size.
 - e. Manufacturer's serial number.
 - f. Arrangement and class.
 - g. Sheave make, size in inches, and bore.
 - h. Center-to-center dimensions of sheave and amount of adjustments in inches.
 - 2. Motor Data:
 - a. Motor make, and frame type and size.
 - b. Horsepower and rpm.
 - c. Volts, phase, and hertz.
 - d. Full-load amperage and service factor.
 - e. Sheave make, size in inches, and bore.

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- f. Center-to-center dimensions of sheave, and amount of adjustments in inches.
 - g. Number, make, and size of belts.
 - 3. Test Data (Indicated and Actual Values):
 - a. Total airflow rate in cfm.
 - b. Total system static pressure in inches wg.
 - c. Fan rpm.
 - d. Discharge static pressure in inches wg.
 - e. Suction static pressure in inches wg.
- J. Round, Flat-Oval, and Rectangular Duct Traverse Reports: Include a diagram with a grid representing the duct cross-section and record the following:
 - 1. Report Data:
 - a. System and air-handling-unit number.
 - b. Location and zone.
 - c. Traverse air temperature in deg F.
 - d. Duct static pressure in inches wg.
 - e. Duct size in inches.
 - f. Duct area in sq. ft..
 - g. Indicated airflow rate in cfm.
 - h. Indicated velocity in fpm.
 - i. Actual airflow rate in cfm.
 - j. Actual average velocity in fpm.
 - k. Barometric pressure in psig.
- K. Air-Terminal-Device Reports:
 - 1. Unit Data:
 - a. System and air-handling unit identification.
 - b. Location and zone.
 - c. Apparatus used for test.
 - d. Area served.
 - e. Make.
 - f. Number from system diagram.
 - g. Type and model number.
 - h. Size.
 - i. Effective area in sq. ft..
 - 2. Test Data (Indicated and Actual Values):
 - a. Airflow rate in cfm.
 - b. Air velocity in fpm.
 - c. Preliminary airflow rate as needed in cfm.
 - d. Preliminary velocity as needed in fpm.
 - e. Final airflow rate in cfm.
 - f. Final velocity in fpm.

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- g. Space temperature in deg F.
- L. System-Coil Reports: For reheat coils and water coils of terminal units, include the following:
 - 1. Unit Data:
 - a. System and air-handling-unit identification.
 - b. Location and zone.
 - c. Room or riser served.
 - d. Coil make and size.
 - e. Flowmeter type.
 - 2. Test Data (Indicated and Actual Values):
 - a. Airflow rate in cfm.
 - b. Entering-water temperature in deg F.
 - c. Leaving-water temperature in deg F.
 - d. Water pressure drop in feet of head or psig.
 - e. Entering-air temperature in deg F.
 - f. Leaving-air temperature in deg F.
- M. Pump Test Reports: Calculate impeller size by plotting the shutoff head on pump curves and include the following:
 - 1. Unit Data:
 - a. Unit identification.
 - b. Location.
 - c. Service.
 - d. Make and size.
 - e. Model number and serial number.
 - f. Water flow rate in gpm.
 - g. Water pressure differential in feet of head or psig.
 - h. Required net positive suction head in feet of head or psig.
 - i. Pump rpm.
 - j. Impeller diameter in inches.
 - k. Motor make and frame size.
 - l. Motor horsepower and rpm.
 - m. Voltage at each connection.
 - n. Amperage for each phase.
 - o. Full-load amperage and service factor.
 - p. Seal type.
 - 2. Test Data (Indicated and Actual Values):
 - a. Static head in feet of head or psig.
 - b. Pump shutoff pressure in feet of head or psig.
 - c. Actual impeller size in inches.
 - d. Full-open flow rate in gpm.
 - e. Full-open pressure in feet of head or psig.

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- f. Final discharge pressure in feet of head or psig.
- g. Final suction pressure in feet of head or psig.
- h. Final total pressure in feet of head or psig.
- i. Final water flow rate in gpm.
- j. Voltage at each connection.
- k. Amperage for each phase.

N. Instrument Calibration Reports:

1. Report Data:

- a. Instrument type and make.
- b. Serial number.
- c. Application.
- d. Dates of use.
- e. Dates of calibration.

3.21 VERIFICATION OF TAB REPORT

- A. The TAB specialist's test and balance engineer shall conduct the inspection in the presence of Owner.
- B. Owner shall randomly select measurements, documented in the final report, to be rechecked. Rechecking shall be limited to either 10 percent of the total measurements recorded or the extent of measurements that can be accomplished in a normal 8-hour business day.
- C. If rechecks yield measurements that differ from the measurements documented in the final report by more than the tolerances allowed, the measurements shall be noted as "FAILED."
- D. If the number of "FAILED" measurements is greater than 10 percent of the total measurements checked during the final inspection, the testing and balancing shall be considered incomplete and shall be rejected.
- E. If TAB work fails, proceed as follows:
 - 1. TAB specialists shall recheck all measurements and make adjustments. Revise the final report and balancing device settings to include all changes; resubmit the final report and request a second final inspection.
 - 2. If the second final inspection also fails, Owner may contract the services of another TAB specialist to complete TAB work according to the Contract Documents and deduct the cost of the services from the original TAB specialist's final payment.
 - 3. If the second verification also fails, design professional may contact AABC Headquarters regarding the AABC National Performance Guaranty.
- F. Prepare test and inspection reports.

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3.22 ADDITIONAL TESTS

- A. Within 90 days of completing TAB, perform additional TAB to verify that balanced conditions are being maintained throughout and to correct unusual conditions.
- B. Seasonal Periods: If initial TAB procedures were not performed during near-peak summer and winter conditions, perform additional TAB during near-peak summer and winter conditions.

END OF SECTION 230593

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