

SECTION 230593 - TESTING, ADJUSTING, AND BALANCING FOR HVAC

PART 1 GENERAL

1.1 SECTION INCLUDES

- A. Testing, adjustment, and balancing of air systems.
- B. Testing, adjustment, and balancing of refrigerating systems.
- C. Measurement of final operating condition of HVAC systems.

1.2 RELATED REQUIREMENTS

- A. Section 014000 - Quality Requirements: Employment of testing agency and payment for services.

1.3 REFERENCE STANDARDS

- A. AABC MN-1 - AABC National Standards for Total System Balance; Associated Air Balance Council; 2002.
- B. ASHRAE Std 111 - Practices for Measurement, Testing, Adjusting and Balancing of Building Heating, Ventilation, Air-Conditioning, and Refrigeration Systems; American Society of Heating, Refrigerating and Air-Conditioning Engineers, Inc.; 1988, with 1997 Errata.
- C. NEBB (TAB) - Procedural Standards for Testing Adjusting Balancing of Environmental Systems; National Environmental Balancing Bureau; 2005, Seventh Edition.
- D. SMACNA (TAB) - HVAC Systems Testing, Adjusting, and Balancing; Sheet Metal and Air Conditioning Contractors' National Association; 2002.

1.4 SUBMITTALS

- A. See Section 013300 - Submittal Procedures, for submittal procedures.
- B. Qualifications: Submit name of adjusting and balancing agency and TAB supervisor for approval within 30 days after award of Contract.
- C. TAB Plan: Submit a written plan indicating the testing, adjusting, and balancing standard to be followed and the specific approach for each system and component.
 - 1. Submit to Engineer.
 - 2. Submit six weeks prior to starting the testing, adjusting, and balancing work.
 - 3. Include certification that the plan developer has reviewed the contract documents, the equipment and systems, and the control system with the Engineer and other installers to

sufficiently understand the design intent for each system.

4. Include at least the following in the plan:
 - a. Preface: An explanation of the intended use of the control system.
 - b. List of all air flow, system capacity and efficiency measurements to be performed and a description of specific test procedures, parameters, formulas to be used.
 - c. Copy of field checkout sheets and logs to be used, listing each piece of equipment to be tested, adjusted and balanced with the data cells to be gathered for each.
 - d. Identification and types of measurement instruments to be used and their most recent calibration date.
 - e. Discussion of what notations and markings will be made on the duct drawings during the process.
 - f. Final test report forms to be used.
 - g. Detailed step-by-step procedures for TAB work for each system and issue, including:
 - 1) Diffuser proportioning.
 - 2) Branch/submain proportioning.
 - 3) Total flow calculations.
 - 4) Rechecking.
 - 5) Diversity issues.
 - h. Expected problems and solutions, etc.
 - i. Specific procedures that will ensure that air side are operating at the lowest possible pressures and methods to verify this.
 - j. Confirmation of understanding of the outside air ventilation criteria under all conditions.
 - k. Method of verifying and setting minimum outside air flow rate will be verified and set and for what level (total building, zone, etc.).
 - l. Method of checking building static and exhaust fan and/or relief damper capacity.
 - m. Methods for making coil or other system plant capacity measurements, if specified.
 - n. Time schedule for TAB work to be done in phases (by floor, etc.).
 - o. Description of TAB work for areas to be built out later, if any.
 - p. Time schedule for deferred or seasonal TAB work, if specified.
 - q. False loading of systems to complete TAB work, if specified.
 - r. Exhaust fan balancing and capacity verifications, including any required room pressure differentials.
 - s. Interstitial cavity differential pressure measurements and calculations, if specified.
 - t. Procedures for field technician logs of discrepancies, deficient or uncompleted work by others, contract interpretation requests and lists of completed tests (scope and frequency).
 - u. Procedures for formal progress reports, including scope and frequency.
 - v. Procedures for formal deficiency reports, including scope, frequency and distribution.

D. Field Logs: Submit at least twice a week to Construction Manager.

- E. Control System Coordination Reports: Communicate in writing to the controls installer all setpoint and parameter changes made or problems and discrepancies identified during TAB that affect, or could affect, the control system setup and operation.
- F. Progress Reports.
- G. Final Report: Indicate deficiencies in systems that would prevent proper testing, adjusting, and balancing of systems and equipment to achieve specified performance.
 - 1. Submit under provisions of Section 014000.
 - 2. Revise TAB plan to reflect actual procedures and submit as part of final report.
 - 3. Submit draft copies of report for review prior to final acceptance of Project. Provide final copies for Engineer and for inclusion in operating and maintenance manuals.
 - 4. Provide reports in soft cover, letter size, 3-ring binder manuals, complete with index page and indexing tabs, with cover identification at front and side. Include set of reduced drawings with air outlets and equipment identified to correspond with data sheets, and indicating thermostat locations.
 - 5. Include actual instrument list, with manufacturer name, serial number, and date of calibration.
 - 6. Form of Test Reports: Where the TAB standard being followed recommends a report format use that; otherwise, follow ASHRAE Std 111.
 - 7. Units of Measure: Report data in I-P (inch-pound) units only.
 - 8. Include the following on the title page of each report:
 - a. Name of Testing, Adjusting, and Balancing Agency.
 - b. Address of Testing, Adjusting, and Balancing Agency.
 - c. Telephone number of Testing, Adjusting, and Balancing Agency.
 - d. Project name.
 - e. Project location.
 - f. Project Architect.
 - g. Project Engineer.
 - h. Project Contractor.
 - i. Project altitude.
 - j. Report date.
- H. Project Record Documents: Record actual locations of flow measuring stations and balancing valves and rough setting.

PART 2 PRODUCTS - NOT USED

PART 3 EXECUTION

3.1 GENERAL REQUIREMENTS

- A. Perform total system balance in accordance with one of the following:

1. AABC MN-1, AABC National Standards for Total System Balance.
 2. ASHRAE Std 111, Practices for Measurement, Testing, Adjusting and Balancing of Building Heating, Ventilation, Air-Conditioning, and Refrigeration Systems.
 3. NEBB Procedural Standards for Testing Adjusting Balancing of Environmental Systems.
 4. SMACNA HVAC Systems Testing, Adjusting, and Balancing.
 5. Maintain at least one copy of the standard to be used at project site at all times.
- B. Begin work after completion of systems to be tested, adjusted, or balanced and complete work prior to Substantial Completion of the project.
- C. Where HVAC systems and/or components interface with life safety systems, including fire and smoke detection, alarm, and control, coordinate scheduling and testing and inspection procedures with the authorities having jurisdiction.
- D. TAB Agency Qualifications:
1. Company specializing in the testing, adjusting, and balancing of systems specified in this section.
 2. Having minimum of three years documented experience.
 3. Certified by one of the following:
 - a. AABC, Associated Air Balance Council: www.aabchq.com; upon completion submit AABC National Performance Guaranty.
 - b. NEBB, National Environmental Balancing Bureau: www.nebb.org.
 - c. TABB, The Testing, Adjusting, and Balancing Bureau of National Energy Management Institute: www.tabbcertified.org.
- E. TAB Supervisor Qualifications: Certified by same organization as TAB agency.

3.2 EXAMINATION

- A. Verify that systems are complete and operable before commencing work. Ensure the following conditions:
1. Systems are started and operating in a safe and normal condition.
 2. Temperature control systems are installed complete and operable.
 3. Proper thermal overload protection is in place for electrical equipment.
 4. Final filters are clean and in place. If required, install temporary media in addition to final filters.
 5. Duct systems are clean of debris.
 6. Fans are rotating correctly.
 7. Fire and volume dampers are in place and open.
 8. Air coil fins are cleaned and combed.

9. Access doors are closed and duct end caps are in place.
 10. Air outlets are installed and connected.
 11. Duct system leakage is minimized.
- B. Submit field reports. Report defects and deficiencies that will or could prevent proper system balance.
- C. Beginning of work means acceptance of existing conditions.

3.3 PREPARATION

- A. Hold a pre-balancing meeting at least one week prior to starting TAB work.
1. Require attendance by all installers whose work will be tested, adjusted, or balanced.
- B. Provide instruments required for testing, adjusting, and balancing operations. Make instruments available to Engineer to facilitate spot checks during testing.
- C. Provide additional balancing devices as required.

3.4 ADJUSTMENT TOLERANCES

- A. Air Handling Systems: Adjust to within plus or minus 5 percent of design for supply systems and plus or minus 10 percent of design for return and exhaust systems.
- B. Air Outlets and Inlets: Adjust total to within plus 10 percent and minus 5 percent of design to space. Adjust outlets and inlets in space to within plus or minus 10 percent of design.

3.5 RECORDING AND ADJUSTING

- A. Field Logs: Maintain written logs including:
1. Running log of events and issues.
 2. Discrepancies, deficient or uncompleted work by others.
 3. Contract interpretation requests.
 4. Lists of completed tests.
- B. Ensure recorded data represents actual measured or observed conditions.
- C. Permanently mark settings of dampers and other adjustment devices allowing settings to be restored. Set and lock memory stops.
- D. Mark on the drawings the locations where traverse and other critical measurements were taken and cross reference the location in the final report.
- E. After adjustment, take measurements to verify balance has not been disrupted or that such

disruption has been rectified.

- F. Leave systems in proper working order, replacing belt guards, closing access doors, closing doors to electrical switch boxes, and restoring thermostats to specified settings.
- G. At final inspection, recheck random selections of data recorded in report. Recheck points or areas as selected and witnessed by the Owner.
- H. Check and adjust systems approximately six months after final acceptance and submit report.

3.6 AIR SYSTEM PROCEDURE

- A. Adjust air handling and distribution systems to provide required or design supply, return, and exhaust air quantities at site altitude.
- B. Make air quantity measurements in ducts by Pitot tube traverse of entire cross sectional area of duct.
- C. Measure air quantities at air inlets and outlets.
- D. Adjust distribution system to obtain uniform space temperatures free from objectionable drafts and noise.
- E. Use volume control devices to regulate air quantities only to extend that adjustments do not create objectionable air motion or sound levels. Effect volume control by duct internal devices such as dampers and splitters.
- F. Vary total system air quantities by adjustment of fan speeds. Provide drive changes required. Vary branch air quantities by damper regulation.
- G. Provide system schematic with required and actual air quantities recorded at each outlet or inlet.
- H. Measure static air pressure conditions on air supply units, including filter and coil pressure drops, and total pressure across the fan. Make allowances for 50 percent loading of filters.
- I. Adjust outside air automatic dampers, outside air, return air, and exhaust dampers for design conditions.
- J. Measure temperature conditions across outside air, return air, and exhaust dampers to check leakage.
- K. Where modulating dampers are provided, take measurements and balance at extreme conditions. Balance variable volume systems at maximum air flow rate, full cooling, and at minimum air flow rate, full heating.

- L. Measure building static pressure and adjust supply, return, and exhaust air systems to provide required relationship between each to maintain approximately 0.05 inches (12.5 Pa) positive static pressure near the building entries.

3.7 SCOPE

- A. Test, adjust, and balance the following:
 - 1. Forced Air Furnaces
 - 2. Direct Fired Furnaces
 - 3. Air Cooled Refrigerant Condensers
 - 4. Air Coils
 - 5. Terminal Heat Transfer Units
 - 6. Fans
 - 7. Energy Recovery Ventilators
 - 8. Air Inlets and Outlets

3.8 MINIMUM DATA TO BE REPORTED

- A. Electric Motors:
 - 1. Manufacturer
 - 2. Model/Frame
 - 3. HP/BHP
 - 4. Phase, voltage, amperage; nameplate, actual, no load
 - 5. RPM
 - 6. Service factor
 - 7. Starter size, rating, heater elements
 - 8. Sheave Make/Size/Bore
- B. V-Belt Drives:
 - 1. Identification/location
 - 2. Required driven RPM
 - 3. Driven sheave, diameter and RPM
 - 4. Belt, size and quantity
 - 5. Motor sheave diameter and RPM
 - 6. Center to center distance, maximum, minimum, and actual
- C. Air Cooled Condensers:

1. Identification/number
2. Location
3. Manufacturer
4. Model number
5. Serial number
6. Entering DB air temperature, design and actual
7. Leaving DB air temperature, design and actual
8. Number of compressors

D. Cooling Coils:

1. Identification/number
2. Location
3. Service
4. Manufacturer
5. Air flow, design and actual
6. Entering air DB temperature, design and actual
7. Entering air WB temperature, design and actual
8. Leaving air DB temperature, design and actual
9. Leaving air WB temperature, design and actual
10. Saturated suction temperature, design and actual
11. Air pressure drop, design and actual

E. Air Moving Equipment:

1. Location
2. Manufacturer
3. Model number
4. Serial number
5. Arrangement/Class/Discharge
6. Air flow, specified and actual
7. Return air flow, specified and actual
8. Outside air flow, specified and actual
9. Total static pressure (total external), specified and actual
10. Inlet pressure
11. Discharge pressure

12. Sheave Make/Size/Bore
 13. Number of Belts/Make/Size
 14. Fan RPM
- F. Return Air/Outside Air:
1. Identification/location
 2. Design air flow
 3. Actual air flow
 4. Design return air flow
 5. Actual return air flow
 6. Design outside air flow
 7. Actual outside air flow
 8. Return air temperature
 9. Outside air temperature
 10. Required mixed air temperature
 11. Actual mixed air temperature
 12. Design outside/return air ratio
 13. Actual outside/return air ratio
- G. Exhaust Fans:
1. Location
 2. Manufacturer
 3. Model number
 4. Serial number
 5. Air flow, specified and actual
 6. Total static pressure (total external), specified and actual
 7. Inlet pressure
 8. Discharge pressure
 9. Sheave Make/Size/Bore
 10. Number of Belts/Make/Size
 11. Fan RPM
- H. Duct Traverses:
1. System zone/branch
 2. Duct size

3. Area
 4. Design velocity
 5. Design air flow
 6. Test velocity
 7. Test air flow
 8. Duct static pressure
 9. Air temperature
 10. Air correction factor
- I. Air Distribution Tests:
1. Air terminal number
 2. Room number/location
 3. Design velocity
 4. Design air flow
 5. Test (final) velocity
 6. Test (final) air flow
 7. Percent of design air flow

END OF SECTION