

## SECTION 230593 - TESTING, ADJUSTING, AND BALANCING FOR HVAC

## PART 1 - GENERAL

## 1.1 SUMMARY

## A. Section Includes:

## 1. Balancing Air Systems:

## a. Constant-volume air systems.

## 1.2 DEFINITIONS

## A. AABC: Associated Air Balance Council.

## B. TAB: Testing, adjusting, and balancing.

## C. TABB: Testing, Adjusting, and Balancing Bureau.

## D. TAB Specialist: An entity engaged to perform TAB Work.

## 1.3 INFORMATIONAL SUBMITTALS

## A. Certified TAB reports.

## 1.4 QUALITY ASSURANCE

## A. Certify TAB field data reports and perform the following:

1. Review field data reports to validate accuracy of data and to prepare certified TAB reports.
2. Certify that the TAB team complied with the approved TAB plan and the procedures specified and referenced in this Specification.

## B. TAB Report Forms: Use standard TAB contractor's forms approved by Construction Manager.

## C. Instrumentation Type, Quantity, Accuracy, and Calibration: As described in ASHRAE 111, Section 5, "Instrumentation."

## 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 systems for installed balancing devices. Verify that locations of these balancing devices 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 system and equipment installations and verify that field quality-control testing, cleaning, and adjusting specified in individual Sections have been performed.
- F. Examine test reports specified in individual system and equipment Sections.
- G. Examine HVAC equipment and filters and verify that bearings are greased, belts are aligned and tight, and equipment with functioning controls is ready for operation.
- H. Examine terminal units and verify that they are accessible and their controls are connected and functioning.
- I. Examine heat-transfer coils for correct piping connections and for clean and straight fins.
- J. Examine operating safety interlocks and controls on HVAC equipment.
- K. 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 strategies and step-by-step procedures.
- B. Complete system-readiness checks and prepare reports. Verify the following:
  - 1. Permanent electrical-power wiring is complete.
  - 2. Automatic temperature-control systems are operational.
  - 3. Equipment and duct access doors are securely closed.
  - 4. Balance, smoke, and fire dampers are open.
  - 5. Ceilings are installed in critical areas where air-pattern adjustments are required and access to balancing devices is provided.
  - 6. Windows and doors can be closed so indicated conditions for system operations can be met.

### 3.3 GENERAL PROCEDURES FOR TESTING AND BALANCING

- A. Perform testing and balancing procedures on each system according to the procedures contained in AABC's "National Standards for Total System Balance" 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 according to Section 230713 "Duct Insulation."
- C. Mark equipment and balancing 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. Crosscheck 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.
- 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 CONSTANT-VOLUME AIR SYSTEMS

- A. Adjust fans to deliver total indicated airflows within the maximum allowable fan speed listed by fan manufacturer.
1. Measure total airflow.
    - a. Where sufficient space in ducts is unavailable for Pitot-tube traverse measurements, measure airflow at terminal outlets and inlets and calculate the total airflow.
  2. Measure fan static pressures as follows to determine actual static pressure:
    - a. Measure outlet static pressure as far downstream from the fan as practical and upstream from restrictions in ducts such as elbows and transitions.

- b. Measure static pressure directly at the fan outlet or through the flexible connection.
    - c. Measure inlet static pressure of single-inlet fans in the inlet duct as near the fan as possible, upstream from the flexible connection, and downstream from duct restrictions.
    - d. Measure inlet static pressure of double-inlet fans through the wall of the plenum that houses the fan.
  3. Measure static pressure across each component that makes up an air-handling unit.
    - a. Report the cleanliness status of filters and the time static pressures are measured.
  4. Measure static pressures entering and leaving other devices under final balanced conditions.
  5. Obtain approval from Construction Manager for adjustment of fan speed higher or lower than indicated speed. Comply with requirements in Sections for air-handling units for adjustment of fans, belts, and pulley sizes to achieve indicated air-handling-unit performance.
  6. 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 will occur. Measure amperage in full-cooling, full-heating, economizer, and any other operating mode to determine the maximum required brake horsepower.
- B. Adjust volume dampers for main duct, submain ducts, and major branch ducts to indicated airflows within specified tolerances.
  1. Measure airflow of submain and branch ducts.
    - a. Where sufficient space in submain and branch ducts is unavailable for Pitot-tube traverse measurements, measure airflow at terminal outlets and inlets and calculate the total airflow for that zone.
  2. Measure static pressure at a point downstream from the balancing damper, and adjust volume dampers until the proper static pressure is achieved.
  3. Remeasure each submain and branch duct after all have been adjusted. Continue to adjust submain and branch ducts to indicated airflows within specified tolerances.
- C. Measure air outlets and inlets without making adjustments.
  1. Measure terminal outlets using a direct-reading hood or outlet manufacturer's written instructions and calculating factors.
- D. Adjust air outlets and inlets for each space to indicated airflows within specified tolerances of indicated values. Make adjustments using branch volume dampers rather than extractors and the dampers at air terminals.
  1. Adjust each outlet in same room or space to within specified tolerances of indicated quantities without generating noise levels above the limitations prescribed by the Contract Documents.
  2. Adjust patterns of adjustable outlets for proper distribution without drafts.

### 3.6 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. Efficiency rating.
  - 5. Nameplate and measured voltage, each phase.
  - 6. Nameplate and measured amperage, each phase.
  - 7. Starter thermal-protection-element rating.
- B. Motors Driven by Variable-Frequency Controllers: Test for proper operation at speeds varying from minimum to maximum. Test the manual bypass of the controller to prove proper operation. Record observations including name of controller manufacturer, model number, serial number, and nameplate data.

### 3.7 PROCEDURES FOR CONDENSING UNITS

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

### 3.8 TOLERANCES

- A. Set HVAC system's air flow 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.

### 3.9 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.

### 3.10 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.
- B. Final Report Contents: In addition to certified field-report data, include the following:

1. Field test reports prepared by system and equipment installers.
2. 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.
2. Project name.
3. Project location.
4. Architect's name and address.
5. Engineer's name and address.
6. Contractor's name and address.
7. Report date.
8. Signature of TAB supervisor who certifies the report.
9. Table of Contents with the total number of pages defined for each section of the report. Number each page in the report.
10. 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.
11. Nomenclature sheets for each item of equipment.
12. Data for terminal units, including manufacturer's name, type, size, and fittings.
13. Notes to explain why certain final data in the body of reports vary from indicated values.
14. 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. Fan drive settings including settings and percentage of maximum pitch diameter.
  - e. Other system operating conditions that affect performance.

3.11 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