

SECTION 23 0594 - TESTING, ADJUSTING, AND BALANCING (TAB) [Confirm TAB requirements with Facilities PM. It may be procured thru the Commissioning Agent]

PART 1 - GENERAL

1.1 SUMMARY

- A. This Section includes testing, adjusting and balancing HVAC systems to provide design conditions as indicated by the associated drawings. This Section includes, but is not limited to the following:
1. Balancing Air Systems - Constant air volume and variable-air-volume systems.
 2. Balancing Hydronic Piping Systems - Constant and variable-flow hydronic systems, and primary-secondary systems.
 3. Measuring the electrical performance of HVAC equipment.
 4. Verification that automatic control devices are functioning properly.
 5. Measurement of sound levels as related to rotating mechanical equipment.
 6. Vibration testing and analysis of all rotating equipment greater than or equal to 10 hp.
 7. Measurement of duct leakage.
 8. Reporting results of the activities and procedures specified in this Section.
- B. The testing, adjusting and balancing of the air and hydronic systems shall be performed by an independent TAB contractor contracted directly by the University, and approved companies are Arrow Testing and Balancing, CEPro, Hill Mechanical, and ITB (Independent Test and Balance).

1.2 DEFINITIONS

- A. AABC: Associated Air Balance Council.
- B. Adjust: To regulate fluid flow rates and air patterns at the system or terminal level. At the system level an example would be reducing fan speed; at the terminal level an example would be changing a damper position.
- C. Balance: To proportion air or water flows within the distribution system, including submains, branches and terminals with respect to design quantities.
- D. Draft: A current of air, when referring to localized effect caused by one or more factors of high air velocity, low ambient temperature, or direction of airflow, whereby more heat is withdrawn from a person's skin than is normally dissipated.
- E. Independent: Not affiliated with or in employment of any Contractor.
- F. NEBB: National Environmental Balancing Bureau.
- G. Procedure: An approach to and execution of a sequence of work operations to yield repeatable results.
- H. Report Forms: Test data sheets for recording test data in logical order.

- I. Static Head: The pressure due to the weight of the fluid above the point of measurement. In a closed system, static head is equal on both sides of the pump.
- J. Suction Head: The height of fluid surface above the centerline of the pump on the suction side.
- K. System Effect: A phenomenon that can create undesired or unpredicted conditions that cause reduced capacities in all or part of a system.
- L. System Effect Factors: Allowances used to calculate a reduction of the performance ratings of a fan when installed under conditions different from those presented when the fan was performance tested.
- M. TAB: Testing, adjusting, and balancing.
- N. TAB Specialist: An entity engaged to perform TAB Work.
- O. Testing, Adjusting and Balancing (TAB) Agent: The entity responsible for performing and reporting the TAB procedures.
- P. Terminal: A point where the controlled medium (fluid or energy) enters or leaves the distribution system.

1.3 PREINSTALLATION MEETINGS

- A. TAB Conference: If requested by the Owner, conduct a TAB conference at project site after approval of the TAB strategies and procedures plan to develop a mutual understanding of the details. Provide a minimum of 14 days' advance notice of scheduled meeting time and location.
 - 1. Minimum Agenda Items:
 - a. The Contract Documents examination report.
 - b. The TAB plan.
 - c. Needs for coordination and cooperation of trades and subcontractors.
 - d. Proposed procedures for documentation and communication flow.

1.4 ACTION SUBMITTALS

A. **[LEED Submittals:**

- 1. ***Air-Balance Report for Prerequisite IEQ 1: Documentation indicating that work complies with ASHRAE 62.1, Section 7.2.2 - "Air Balancing."***
- 2. ***TAB Report for Prerequisite EA 2: Documentation indicating that work complies with ASHRAE/IESNA 90.1, Section 6.7.2.3 - "System Balancing."***

1.5 INFORMATIONAL SUBMITTALS

- A. Qualification Data: Within **[30] [60] [90] <Insert number>** 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] [60] [90] <Insert number>** 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] [60] [90] <Insert number>** 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] [60] [90] <Insert number>** 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.

1.6 QUALITY ASSURANCE

- A. TAB Specialists Qualifications: Certified by AABC or NEBB.
 - 1. TAB Field Supervisor: Employee of the TAB specialist and certified by AABC or NEBB.
 - 2. TAB Technician: Employee of the TAB specialist and certified by AABC or NEBB as a TAB technician.
- B. Instrumentation Type, Quantity, Accuracy, and Calibration: Comply with requirements in ASHRAE 111, Section 4, "Instrumentation" but in all cases, all instrumentation used for testing shall be calibrated within 6 months of use, an accuracy of the instrumentation shall not be less than what is specified by the instrument manufacturer.
- C. 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.
- D. ASHRAE Compliance: Applicable requirements in ASHRAE 62.1, Section 7.2.2 - "Air Balancing."
- E. ASHRAE/IESNA Compliance: Applicable requirements in ASHRAE/IESNA 90.1, Section 6.7.2.3 - "System Balancing."

1.7 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.
- B. Partial Owner Occupancy: Owner may occupy completed areas of building before Substantial Completion. Cooperate with Owner during TAB operations to minimize conflicts with Owner's operations.

1.8 WARRANTY

- A. Provide one of the following performance guarantees:
 - 1. AABC National Project Performance Guarantee
 - 2. NEBB Certificate of Conformance Certification
 - 3. TABB Quality Assurance Program Guarantee
- B. Guarantee shall include provisions that the certified TAB firm has tested and balanced systems according to the Contract Document and that the systems are balanced to optimum performance capabilities within design and installation limits.

PART 2 - PRODUCTS

2.1 INSTRUMENT TEST HOLES

- A. To be Ventlock #699,

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, 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 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 meet the leakage class of connected ducts as specified in Division 23 Section "Ductwork" and 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 filters and verify that bearings are greased, belts are aligned and tight, and equipment with functioning controls is ready for operation.
- J. Examine terminal units, such as variable-air-volume boxes, and verify that they are accessible and their controls are connected and functioning.
- K. Examine strainers. Verify that startup screens are replaced by permanent screens with indicated perforations.
- L. Examine three-way valves for proper installation for their intended function of 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 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. Hydronic systems are filled, clean, and free of air.
 - 3. Automatic temperature-control systems are operational.
 - 4. Equipment and duct access doors are securely closed.
 - 5. Balance, smoke, and fire dampers are open.
 - 6. Isolating and balancing valves are open and control valves are operational.
 - 7. Ceilings are installed in critical areas where air-pattern adjustments are required and access to balancing devices is provided.

8. 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" or NEBB's "Procedural Standards for Testing, Adjusting, and Balancing of Environmental Systems" and in this Section.
 1. Comply with requirements in ASHRAE 62.1-2007, Section 7.2.2, "Air Balancing."
- B. Cut insulation, ducts, pipes, and equipment cabinets for installation of test holes and probes to the extent necessary for TAB procedures, and duct test hole fittings shall be provided where shown on the drawings or specified in the Data sheets. T&B instrument test holes to be Ventlock #699.
 1. After testing and balancing, install and join new insulation that matches removed materials. Restore insulation, coverings, vapor barrier, and finish according to Division 23 Section "Mechanical System Insulation."
- 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. Crosscheck the summation of required outlet volumes with required fan volumes.
- B. Prepare schematic diagrams of systems' "as-built" duct layouts.
- C. For variable-air-volume systems, develop a plan to simulate diversity.
- D. Determine the best locations in main and branch ducts for accurate duct-airflow measurements.
- E. 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.
- F. Locate start-stop and disconnect switches, electrical interlocks, and motor starters.
- G. Verify that motor starters are equipped with properly sized thermal protection.
- H. Check dampers for proper position to achieve desired airflow path.
- I. Check for airflow blockages.
- J. Check condensate drains for proper connections and functioning.
- K. Check for proper sealing of air-handling-unit components.

- L. Verify that air duct system is sealed as specified in Division 23 Section "Ductwork."

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, rooftop unit, and other air-handling and -treating equipment.
 - a. Report the cleanliness status of filters and the time static pressures are measured.
 - 4. Measure static pressures entering and leaving other devices, such as sound traps, heat-recovery equipment, and air washers, under final balanced conditions.
 - 5. 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.
 - 6. Obtain approval from Engineer for adjustment of fan speed higher or lower than indicated speed. Comply with requirements in Division 23 Sections for air-handling units for adjustment of fans, belts, and pulley sizes to achieve indicated air-handling-unit performance.
 - 7. 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 VARIABLE-AIR-VOLUME SYSTEMS
- A. Compensating for Diversity: When the total airflow of all terminal units is more than the indicated airflow of the fan, place a selected number of terminal units at a minimum set-point airflow with the remainder at maximum airflow condition until the total airflow of the terminal units equals the indicated airflow of the fan. Select the reduced-airflow terminal units so they are distributed evenly among the branch ducts.
- B. Pressure-Independent, Variable-Air-Volume Systems: After the fan systems have been adjusted, adjust the variable-air-volume systems as follows:
1. Set outdoor-air dampers at minimum, and set return- and exhaust-air dampers at a position that simulates full-cooling load.
 2. Select the terminal unit that is most critical to the supply-fan airflow and static pressure. Measure static pressure. Adjust system static pressure so the entering static pressure for the critical terminal unit is not less than the sum of the terminal-unit manufacturer's recommended minimum inlet static pressure plus the static pressure needed to overcome terminal-unit discharge system losses.
 3. Measure total system airflow. Adjust to within indicated airflow.
 4. Set terminal units at maximum airflow and adjust controller or regulator to deliver the designed maximum airflow. Use terminal-unit manufacturer's written instructions to make this adjustment. When total airflow is correct, balance the air outlets downstream from terminal units the same as described for constant-volume air systems.
 5. Set terminal units at minimum airflow and adjust controller or regulator to deliver the designed minimum airflow. Check air outlets for a proportional reduction in airflow the same as described for constant-volume air systems.
 - a. If air outlets are out of balance at minimum airflow, report the condition but leave outlets balanced for maximum airflow.
 6. Re-measure the return airflow to the fan while operating at maximum return airflow and minimum outdoor airflow.

- a. Adjust the fan and balance the return-air ducts and inlets the same as described for constant-volume air systems.
 7. Measure static pressure at the most critical terminal unit and adjust the static-pressure controller at the main supply-air sensing station to ensure that adequate static pressure is maintained at the most critical unit.
 8. Record final fan-performance data.
- C. Pressure-Dependent, Variable-Air-Volume Systems with Diversity: After the fan systems have been adjusted, adjust the variable-air-volume systems as follows:
1. Set system at maximum indicated airflow by setting the required number of terminal units at minimum airflow. Select the reduced-airflow terminal units so they are distributed evenly among the branch ducts.
 2. Adjust supply fan to maximum indicated airflow with the variable-airflow controller set at maximum airflow.
 3. Set terminal units at full-airflow condition.
 4. Adjust terminal units starting at the supply-fan end of the system and continuing progressively to the end of the system. Adjust inlet dampers of each terminal unit to indicated airflow. When total airflow is correct, balance the air outlets downstream from terminal units the same as described for constant-volume air systems.
 5. Adjust terminal units for minimum airflow.
 6. Measure static pressure at the sensor.
 7. Measure the return airflow to the fan while operating at maximum return airflow and minimum outdoor airflow. Adjust the fan and balance the return-air ducts and inlets the same as described for constant-volume air systems.

3.7 GENERAL PROCEDURES FOR HYDRONIC SYSTEMS

- A. Prepare test reports with pertinent design data, and number in sequence starting at pump to end of system. Check the sum of branch-circuit flows against the approved pump flow rate. Correct variations that exceed plus or minus 5 percent.
- B. Prepare schematic diagrams of systems' "as-built" piping layouts.
- C. Prepare hydronic systems for testing and balancing according to the following, in addition to the general preparation procedures specified above:
 1. Open all manual valves for maximum flow.
 2. Check charging/liquid levels in expansion tanks.
 3. Check makeup water-station pressure gage for adequate pressure for highest vent.
 4. Check flow-control valves for specified sequence of operation, and [set at indicated flow] [verify flow matches gpm on flow control valve].
 5. Set differential-pressure control valves at the specified differential pressure. Do not set at fully closed position when pump is positive-displacement type unless several terminal valves are kept open.
 6. Set system controls so automatic valves are wide open to heat exchangers.
 7. Check pump-motor load. If motor is overloaded, throttle main flow-balancing device so motor nameplate rating is not exceeded, or inform Engineer if pump does not have a flow control device at the discharge of the pump.
 8. Check air vents for a forceful liquid flow exiting from vents when manually operated.

3.8 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.
- 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.
4. Verify that memory stops have been set.

3.9 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 in section 3.7 for hydronic systems.

3.10 Systems installed with pressure independent control valves shall not require full hydronic system balancing. Flow shall be verified for the pressure independent valve assembly (valve and actuator combination) for field conditions using the pressure independent control valve manufacturer's documented procedure for **[20%] [50%] [100%]** of the total installed product. Exact locations of tested product to be coordinated with the drawings.

3.11 PROCEDURES FOR PRIMARY-SECONDARY HYDRONIC SYSTEMS

- A. Balance the primary circuit flow first.
- B. Balance the secondary circuits after the primary circuits are complete.
- C. 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.
- D. 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.
- E. 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.
 - F. 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.
 - G. 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.
 - H. 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.
 - I. Verify that memory stops have been set.
- 3.12 PROCEDURES FOR STEAM SYSTEMS
- A. Measure and record upstream and downstream pressure of each piece of equipment.
 - B. Measure and record upstream and downstream steam pressure of pressure-reducing valves.
 - C. Check settings and operation of automatic temperature-control valves, self-contained control valves, and pressure-reducing valves. Record final settings.
 - D. Check settings and operation of each safety valve. Record settings.
 - E. Verify the operation of each steam trap.
- 3.13 PROCEDURES FOR HEAT EXCHANGERS
- A. Adjust water flow to within specified tolerances.
 - B. Measure inlet and outlet water temperatures.
 - C. Measure inlet steam pressure.
 - D. Check settings and operation of safety and relief valves. Record settings.

3.14 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.

3.15 PROCEDURES FOR COOLING TOWERS

- A. Balance total condenser-water flows to towers. Measure and record the following data:
1. Condenser-water flow to each cell of the cooling tower.
 2. Entering- and leaving-water temperatures.
 3. Wet- and dry-bulb temperatures of entering air.
 4. Wet- and dry-bulb temperatures of leaving air.
 5. Condenser-water flow rate recirculating through the cooling tower.
 6. Cooling-tower spray pump discharge pressure.
 7. Condenser-water flow through bypass.
 8. Fan and motor operating data.

3.16 PROCEDURES FOR CONDENSING UNITS

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

3.17 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.
- B. Steam Boilers:
1. Measure and record entering-water temperature.
 2. Measure and record feed water flow.
 3. Measure and record leaving-steam pressure and temperature.
 4. Record relief valve pressure setting.

3.18 PROCEDURES FOR CHILLERS

- A. Balance water flow through each evaporator and condenser to within specified tolerances of indicated flow with all pumps operating. With only one chiller operating in a multiple chiller installation, do not exceed the flow for the maximum tube velocity recommended by the chiller manufacturer. Measure and record the following data with each chiller operating at design conditions:
1. Evaporator-water entering and leaving temperatures, pressure drop, and water flow.
 2. For water-cooled chillers, condenser-water entering and leaving temperatures, pressure drop, and water flow.
 3. Evaporator and condenser refrigerant temperatures and pressures, using instruments furnished by chiller manufacturer.
 4. Power factor if factory-installed instrumentation is furnished for measuring kilowatts.
 5. Kilowatt input if factory-installed instrumentation is furnished for measuring kilowatts.
 6. Capacity: Calculate in tons of cooling.
 7. For air-cooled chillers, verify condenser-fan rotation and record fan and motor data including number of fans and entering- and leaving-air temperatures.

3.19 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.
 4. Dry-bulb temperature of entering and leaving air.
 5. Wet-bulb temperature of entering and leaving air for cooling coils.
 6. Airflow.
 7. Air pressure drop.
- 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 and at each incremental stage.
 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. Air pressure drop.
 4. 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.
 4. Air pressure drop.

5. Refrigerant suction pressure and temperature.

3.20 TOLERANCES/ACCEPTED CRITERIA

1. For most spaces, the total supply air quantity to each space of a system shall be within -5% to +10% of design. Review project specific requirements with NU Project Manager.
2. The percent tolerance of each outlet within a space shall be per Table 23 0594-1.

Table 23 0594-1			
System	Number of Outlets in Space		
	1	2	3 or More
Single Zone, Multi-zone, VAV	-5% +10%	±10%	± 15%
Heating and Ventilating	-5% +10%	±15%	±15%

3. Air quantity of each return air grille and diffuser shall be within ±10% of design. The design room pressurization must be maintained regardless of the tolerance at each individual diffuser.
4. Vivariums: In general, these laboratories shall be under negative pressure. The design should meet the current NIH Design Requirements Manual for Biomedical Laboratories and Animal Research Facilities. Any reduction in airflow shall be presented by the project Engineer of Record and reviewed by the NU Project Manager and Project Engineer.
5. Culture Rooms: These rooms shall be under positive pressure.
6. Hydronic Systems: Heating and cooling hydronic systems shall be balanced so that the flow is from 0 to +5% of design at each coil.
7. Combination fire/smoke dampers in dynamic smoke control systems shall be tested for closure under airflow conditions (International Mechanical Code – 2009, Section 607), and to assure positive pressure of certain zones, and negative pressure for other zones. Smoke dampers in dynamic smoke control systems must close under airflow conditions.

3.21 REPORTING

- A. All test reports are to have an Executive Summary which shall state extent of system compliance, system deficiencies, and recommended changes.
- B. 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.
- C. Status Reports: Prepare bi-weekly 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.

3.22 FINAL REPORT

- A. General: Prepare a certified written report; tabulate and divide the report into separate sections for tested systems and balanced systems.

NORTHWESTERN UNIVERSITY
PROJECT NAME _____
JOB # _____

FOR: _____
ISSUED: 11/06/2017

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. 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.
 2. Name and address of the TAB contractor.
 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. Settings for differential pressure, hydronic differential control
 - i. 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.

NORTHWESTERN UNIVERSITY
PROJECT NAME _____
JOB # _____

FOR: _____
ISSUED: 11/06/2017

5. Terminal units.
6. Balancing stations.
7. Position of balancing devices.

3.23 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.

NORTHWESTERN UNIVERSITY
PROJECT NAME _____
JOB # _____

FOR: _____
ISSUED: 11/06/2017

- 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 23 0594

NORTHWESTERN UNIVERSITY
PROJECT NAME _____
JOB # _____

FOR: _____
ISSUED: 11/06/2017

THIS PAGE IS INTENTIONALLY BLANK