

SECTION 23 05 93
TESTING, ADJUSTING, AND BALANCING FOR HVAC

PART 1 - GENERAL

1.1 DESCRIPTION

- A. Testing, adjusting, and balancing (TAB) of heating, ventilating and air conditioning (HVAC) systems. TAB includes the following:
 - 1. Planning systematic TAB procedures.
 - 2. Design Review Report.
 - 3. Systems Inspection report.
 - 4. Systems Readiness Report.
 - 5. Balancing water distribution systems; adjustment of total system to provide design performance; and testing performance of equipment and automatic controls.
 - 6. Vibration and sound measurements.
 - 7. Recording and reporting results.
- B. Definitions:
 - 1. Basic TAB used in this Section: Chapter 37, "Testing, Adjusting and Balancing" of ASHRAE Handbook, "HVAC Applications".
 - 2. TAB: Testing, Adjusting and Balancing; the process of checking and adjusting HVAC systems to meet design objectives.
 - 3. AABC: Associated Air Balance Council.
 - 4. NEBB: National Environmental Balancing Bureau.
 - 5. Hydronic Systems: Includes feedwater.

1.2 RELATED WORK

- A. Section 23 05 11, COMMON WORK RESULTS FOR HVAC AND STEAM GENERATION: General Mechanical Requirements.
- B. Section 23 05 41, NOISE AND VIBRATION CONTROL FOR HVAC PIPING AND EQUIPMENT: Noise and Vibration Requirements.
- C. Section 23 07 11, HVAC, PLUMBING, AND BOILER PLANT INSULATION: Piping and Equipment Insulation.

1.3 QUALITY ASSURANCE

- A. Refer to Articles, Quality Assurance and Submittals, in Section 23 05 11, COMMON WORK RESULTS FOR HVAC AND STEAM GENERATION.
- B. Qualifications:

1. TAB Agency: The TAB agency shall be a subcontractor of the General Contractor and shall report to and be paid by the General Contractor.
2. The TAB agency shall be either a certified member of AABC or certified by the NEBB to perform TAB service for HVAC, water balancing and vibrations and sound testing of equipment. The certification shall be maintained for the entire duration of duties specified herein. If, for any reason, the agency loses subject certification during this period, the General Contractor shall immediately notify the COTR and submit another TAB firm for approval. Any agency that has been the subject of disciplinary action by either the AABC or the NEBB within the five years preceding Contract Award shall not be eligible to perform any work related to the TAB. All work performed in this Section and in other related Sections by the TAB agency shall be considered invalid if the TAB agency loses its certification prior to Contract completion, and the successor agency's review shows unsatisfactory work performed by the predecessor agency.
3. TAB Specialist: The TAB specialist shall be either a member of AABC or an experienced technician of the Agency certified by NEBB. The certification shall be maintained for the entire duration of duties specified herein. If, for any reason, the Specialist loses subject certification during this period, the General Contractor shall immediately notify the COTR and submit another TAB Specialist for approval. Any individual that has been the subject of disciplinary action by either the AABC or the NEBB within the five years preceding Contract Award shall not be eligible to perform any duties related to the HVAC systems, including TAB. All work specified in this Section and in other related Sections performed by the TAB specialist shall be considered invalid if the TAB Specialist loses its certification prior to Contract completion and must be performed by an approved successor.
4. TAB Specialist shall be identified by the General Contractor within 60 days after the notice to proceed. The TAB specialist will be coordinating, scheduling and reporting all TAB work and related

- activities and will provide necessary information as required by the Resident Engineer. The responsibilities would specifically include:
- a. Shall directly supervise all TAB work.
 - b. Shall sign the TAB reports that bear the seal of the TAB standard. The reports shall be accompanied by report forms and schematic drawings required by the TAB standard, AABC or NEBB.
 - c. Would follow all TAB work through its satisfactory completion.
 - d. Shall provide final markings of settings of all HVAC adjustment devices.
 - e. Permanently mark location of duct test ports.
5. All TAB technicians performing actual TAB work shall be experienced and must have done satisfactory work on a minimum of 3 projects comparable in size and complexity to this project. Qualifications must be certified by the TAB agency in writing.
- C. Test Equipment Criteria: The instrumentation shall meet the accuracy/calibration requirements established by AABC National Standards or by NEBB Procedural Standards for Testing, Adjusting and Balancing of Environmental Systems and instrument manufacturer. Provide calibration history of the instruments to be used for test and balance purpose.
- D. Tab Criteria:
1. One or more of the applicable AABC, NEBB or SMACNA publications, supplemented by ASHRAE Handbook "HVAC Applications" Chapter 36, and requirements stated herein shall be the basis for planning, procedures, and reports.
 2. Flow rate tolerance: Following tolerances are allowed. For tolerances not mentioned herein follow ASHRAE Handbook "HVAC Applications", Chapter 36, as a guideline.
 - a. Water pumps: Minus 5 percent to plus 5 percent.

1.4 SUBMITTALS

- A. Submit in accordance with Section 01 33 23, SHOP DRAWINGS, PRODUCT DATA, AND SAMPLES.
- B. Submit names and qualifications of TAB agency and TAB specialists within 60 days after the notice to proceed. Submit information on three recently completed projects and a list of proposed test equipment.

- C. For use by the COTR staff, submit one complete set of applicable AABC or NEBB publications that will be the basis of TAB work.
- D. Submit Following for Review and Approval:
 - 1. Systems inspection report on equipment and installation for conformance with design.
 - 2. Systems Readiness Report.
 - 3. Intermediate and Final TAB reports covering flow balance and adjustments, performance tests, vibration tests and sound tests.
 - 4. Include in final reports uncorrected installation deficiencies noted during TAB and applicable explanatory comments on test results that differ from design requirements.
- E. Prior to request for Final or Partial Final inspection, submit completed Test and Balance report for the area.

1.5 APPLICABLE PUBLICATIONS

- A. The following publications form a part of this specification to the extent indicated by the reference thereto. In text the publications are referenced to by the acronym of the organization.
- B. American Society of Heating, Refrigerating and Air Conditioning Engineers, Inc. (ASHRAE):
 - 2003.....HVAC Applications ASHRAE Handbook, Chapter 37, Testing, Adjusting, and Balancing and Chapter 47, Sound and Vibration Control
- C. Associated Air Balance Council (AABC):
 - 2002.....AABC National Standards for Total System Balance
- D. National Environmental Balancing Bureau (NEBB):
 - 7th Edition 2005Procedural Standards for Testing, Adjusting, Balancing of Environmental Systems
 - 1st Edition 1994Procedural Standards for the Measurement and Assessment of Sound and Vibration
 - 2nd Edition 1999Procedural Standards for Building Systems Commissioning
- E. Sheet Metal and Air Conditioning Contractors National Association (SMACNA):
 - 3rd Edition 2002HVAC SYSTEMS-Testing, Adjusting and Balancing

PART 2 - PRODUCTS

2.1 INSULATION REPAIR MATERIAL

See Section 23 07 11, HVAC, PLUMBING, AND BOILER PLANT INSULATION.

Provide for repair of insulation removed or damaged for TAB work.

PART 3 - EXECUTION

3.1 GENERAL

- A. Refer to TAB Criteria in Article, Quality Assurance.
- B. Obtain applicable contract documents and copies of approved submittals for HVAC equipment and automatic control systems.

3.2 SYSTEMS INSPECTION REPORT

- A. Inspect equipment and installation for conformance with design.
- B. The inspection and report is to be done after equipment is on site and installation has begun, but well in advance of performance testing and balancing work. The purpose of the inspection is to identify and report deviations from design and ensure that systems will be ready for TAB at the appropriate time.

3.3 TAB REPORTS

- A. Submit report for systems and equipment tested and balanced to establish satisfactory test results.
- B. The TAB contractor shall provide raw data immediately in writing to the COTR if there is a problem in achieving intended results before submitting a formal report.

3.4 TAB PROCEDURES

- A. Tab shall be performed in accordance with the requirement of the Standard under which TAB agency is certified by either AABC or NEBB.
- B. General: During TAB all related system components shall be in full operation. Pump rotation, motor loads and equipment vibration shall be checked and corrected as necessary before proceeding with TAB.
- C. Coordinate TAB procedures with any phased construction completion requirements for the project. Provide TAB reports for each phase of the project prior to partial final inspections of each phase of the project.
- D. Water Balance and Equipment Test: Include circulating pumps:
 - 1. Adjust flow rates for equipment.
 - 2. Record final measurements for hydronic equipment on performance data sheets.

3.5 VIBRATION TESTING

- A. Furnish instruments and perform vibration measurements as specified in Section 23 05 41, NOISE AND VIBRATION CONTROL FOR HVAC PIPING AND EQUIPMENT. Field vibration balancing is specified in Section 23 05 11, COMMON WORK RESULTS FOR HVAC AND STEAM GENERATION. Provide measurements for all rotating HVAC equipment of 373 watts (1/2 horsepower) and larger, pumps, fans and motors.
- B. Record initial measurements for each unit of equipment on test forms and submit a report to the COTR. Where vibration readings exceed the allowable tolerance Contractor shall be directed to correct the problem. The TAB agency shall verify that the corrections are done and submit a final report to the Resident Engineer.

3.6 IDENTIFICATION OF TEST PORTS

The TAB Specialist shall permanently and legibly identify the location points of duct test ports. If the ductwork has exterior insulation, the identification shall be made on the exterior side of the insulation. All penetrations through ductwork and ductwork insulation shall be sealed to prevent air leaks and maintain integrity of vapor barrier.

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