## UNITED TESTING AND BALANCING, INC.

P.O. Box 100874 Nashville, TN 37224-0874 Telephone 615.331.1294 Fax 615.331.1297

| Date:         |  |
|---------------|--|
| Project Name: |  |
| Address:      |  |
| Sheet:        |  |

| PRELIMINARY CHECKLIST (AIR)   |        |     |
|---|--------|-----|
| Is the system's HVAC ductwork complete? (All supply, return, exhaust grilles or other type air diffusers, turning vanes, etc., installed.)  | Yes/No | N/A |
| 2. Are all MVDs installed at the end of runs and at square to rounds and per prints?  |        |     |
| 3. Are all automatic, fire and fire/smoke dampers installed, functioning and in the open position for system balance?   |        |     |
| 4. Are all access doors installed in reachable locations and in the closed position<br>for system balance?  |        |     |
| 5. Are all balancing dampers 100% open and accessible for balance of system(s)?   |        | -·  |
| 6. Do all HVAC systems have power? Are controls complete and ready for balance?   |        |     |
| 7. Are all terminal boxes installed and complete with programs per prints and<br>submittals? Is power turned on to all boxes?   |        |     |
| 8. Are all filters installed for system and in good, clean balanceable condition?   |        |     |
| <ol><li>Is building architecturally complete enough for systems to be balanced?<br/>(Are all windows, doors, walls, etc., complete?)</li></ol>  |        |     |
| 10. Are there any holes or noticeable leaks in ductwork or system that would hinder system balance?   |        |     |
| 11. Has HVAC systems startup been performed? Is all equipment functioning properly? (No belts loose, drives aligned and tightened, etc.)  |        |     |
| 12 Will any other contractor hinder starting balance on system or from completing it? (Floor/ceiling tile installation/fire alarm testing)  |        |     |
| 13. Are duct connections too close to elbows or at coils bypassing duct taps?<br>(Refer to print scale. Could cause additional balance work later if not caught during walk-through.) |        |     |
| 14. Do the return/exhaust grilles have MVDs or face dampers for performing balance?<br>What is indicated on the prints? (including the detail drawing and specifications)?            |        |     |
| 15. Do the MVDs move freely? Are MVDs left in the open position?  |        |     |
| 16. At what percentage is the job (as a whole) ready for balance?"  |        | _   |
| 17. How many systems are ready for a complete balance (3 out of 10, etc.)?  |        |     |
| 18. In approximately how many days, weeks or months will the system be ready?   |        |     |

Project#

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| Date: _       |  |
|---------------|--|
| Project Name: |  |
| Address:      |  |
| Shoot:        |  |

| PRELIMINARY CHECKLIST (WATER)   | Yes/No | N/A |
|---|--------|-----|
| Do the pumps have power? Has start-up and pump alignment taken place?   |        |     |
| 2. Have strainers been checked and are clean? Have construction strainers been removed?   |        |     |
| 3. Does the piping system (as a whole) look complete? Are all the coils and components to system piped?   |        |     |
| 4. Are PT plugs, gauges or gauge cocks located in the proper position for<br>balancing of pumps?  |        |     |
| 5. Are all automatic control valves wired and under control? Are all manual valves<br>and circuit setters open to each coil, zone and/or at risers? |        |     |
| 6. Are pumps running, system flushed and clean? Has air been bled from the<br>system while valves were open to all coils?                           |        |     |
| 7. Are there any noticeable piping changes (such as pipe size) or piping that<br>deviates from the prints?  |        |     |
| 8. If system coils are not all three-way at valves, is the main bypass or frequency drive under control?  |        |     |
| 9. Has make-up water been piped in? Is PRV set to proper system pressure?   |        |     |
| 10. Are automatic air vents installed per prints and in the proper locations?   |        |     |
| 11. Are PTs or gauge cocks located at all chillers and heat exchangers to verify flow during balancing?   |        |     |
| 12. At what percentage is the system (as a whole) ready for balance?  |        |     |
| 13. In approximately how many days, weeks or months will the system be ready?   |        |     |
| <ol> <li>List and noticeable deficiencies or problems that might hinder a proper<br/>system balance.</li> </ol>                                     |        |     |
|   |        |     |
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