



Pre-Functional Checklist Fan / Coil Unit FCU - XXX

PROJECT:

PROJECT NUMBER:

REPORT ID:

EQUIPMENT DESCRIPTION: Fan / Coil Unit

TAG NO: FCU - XXX

LOCATION:

This Pre-Functional Checklist is used during the Performance Assurance Process to insure the correct equipment is delivered, installed and properly started in preparation for Functional Testing of related building systems. This checklist does not take the place of the Manufacturer's recommended checkout and startup procedures.

This Checklist is divided into 4 Sections and is to be completed by the Contractor in 4 separate steps. When completing each Section, be sure to check and initial EACH line item as being completed. Each Section's items must ALL be checked complete and initialed before the form is submitted to the PAC Authority. Any item which does not apply can be marked as "N/A" in the initial section. **If this form is not used for documenting, one approved by NMPSFA of similar rigor shall be used.**

This filled-out checklist has been reviewed with the exceptions noted below.

COMMENTS:



**Pre-Functional Checklist
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SECTION 1 – EQUIPMENT DELIVERY:

The Contractor shall complete Section 1 of this form when the equipment is delivered to the site. The purpose is to record the actual design parameters listed below along with the checklist items as indicated. Should there be any discrepancy between the Actual and the Submitted information, or any item be checked incomplete, the Contractor shall immediately notify the PAC and RFM.

DESIGN PARAMETERS:

Parameter	Designed	Submitted	Actual
Make	(Make)		
Model	(Model Number)		
Serial	(Serial Number)		
Fan Air Flow	(0000) cfm		
ESP	(00.0) in. wg		
Motor Size	(00) HP		
RPM	(0000) RPM		
Voltage	(000) V / (0)Φ / (00) Hz		

CHECKLIST ITEMS:

Initial	Complete	Description
_____	Yes / No	All related submittals approved by A/E
_____	Yes / No	O&M data provided to PAC agent
_____	Yes / No	Equipment thoroughly inspected for physical damage
_____	Yes / No	The air openings are sealed with durable plastic
_____	Yes / No	Power supply voltage and phase correct
_____	Yes / No	Electrical Verified: Source Panel, Panel Location, Circuit (List in Comments below)

COMMENTS:

The checklist items of SECTION 1 are all successfully completed.....__YES __NO



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SECTION 2 – EQUIPMENT INSTALLATION / PRE-STARTUP:

The Contractor shall complete Section 2 of this form when the installation of the equipment is being performed. The purpose of this Section is to insure the equipment is installed to the Project Design and the Manufacturer’s recommendations. Immediately notify the PAC and RFM should any item be checked incomplete.

The Contractor shall have personnel with direct knowledge complete this checklist to verify that systems are installed, complete and operable, before the commencement of TAB work. ***This checklist does not replace any manufacturer recommended procedures.*** Contractor shall be responsible for ensuring that work by subcontractors is completed and checked off. Prior to commencement of TAB work, the Contractor shall submit a written request to the Owner, including completed construction checklists for mechanical inspection of the project to establish that the systems are ready for testing and balancing.

Pre-start Checks Check box for completion	✓	N/A	Comment
No Physical Damage observed on unit			
Components, dampers, actuators, mounting, & isolation installed			
Plenums & ductwork connected and sealed			
Fire dampers installed, tested, and under control			
Coil piping & valves installed, labeled and tested			
Balancing devices & test points installed as shown on drawings			
Isolation valves are open, air has been bled; water is flowing			
Condensate drains installed and clear			
Electrical connections completed properly			
Disconnect switch installed properly			
Starter is installed with proper heaters			
Temperature/pressure gauges and sensors properly located			
Fan/motor alignment performed; belts properly adjusted			
Equipment guards in place			
Fan and motor bearings lubricated and fan/motor turns freely			
Building controls/DDC system operational			
Filters are installed and are clean			
Adequate access exists for air filter replacement			
Uninterrupted electrical power is available from a permanent source			
Ready to start and operate under control			

The checklist items of SECTION 2 are all successfully completed.....__ YES __ NO



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SECTION 3 – EQUIPMENT START-UP:

The Contractor shall complete Section 3 of this form during the Start-up procedures for the equipment. The purpose of this Section is to document that proper start-up and check-out procedures were completed and documented.

Startup/Operational Checks Check box for completion	<input checked="" type="checkbox"/>	N/A	Comment
Startup by Manufacturer's Representative			
Mechanical, Electrical, and Controls Contractors present			
Fan rotation is correct (bump)			
Operation of Electrical & Controls interlocks verified			
Fan status indicators verified			
Freeze protection is operational			
Dampers easily stroke to full positions and span is calibrated			
Local air leakage is acceptable			
HOA switch operates in all positions; safeties operate when in Hand			
Motor Amps: Rated _____ Actual _____			
Motor Voltage: Rated _____ Actual _____			
Multi-speed motors energize in all speed modes			
Vibration/noise level is acceptable			
Equipment has run continuously for a minimum of (4) hours			
Preliminary O&M Manuals provided to Owner			
PAC and RFM have been notified of Start-Up			
Start-Up report completed (attach report)			

The checklist items of SECTION 3 are all successfully completed..... YES NO

SECTION 4 – NOTIFICATION FOR TESTING:

This piece of equipment is properly installed, has been properly started up and is operational and ready for performance testing.

ALL FIELDS MUST BE ENTERED. NO BLANKS. IF NOT INVOLVED, N/A.

RESPONSIBLE PARTY	VERIFIED BY (Name)	COMPANY	DATE
Mechanical Contractor			
Plumbing Contractor			
General Contractor			
Controls Contractor			



New Mexico Public School Facilities Authority
1312 Basehart Rd. SE, Suite 200
Albuquerque, NM 87106-4368

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Electrical Contractor			
PAC Consultant			
NMPSFA RFM			
Manufacturer Rep.			