



PRE-FUNCTIONAL CHECKLIST – TAB

PROJECT:

PROJECT NUMBER:

REPORT ID:

EQUIPMENT DESCRIPTION: Ductwork

TAG NO: N/A

LOCATION:

WEATHER CONDITIONS:

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 2 Sections and is to be completed by the Contractor in 2 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:



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SECTION 1 – PRE-START CHECKS:

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. 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 to the satisfaction of all parties that the systems are ready for testing and balancing.

1.HVAC Units & Built-Up Units	Ready		Int.
	Yes	No	
a) GENERAL			
Louvers installed			
Manual dampers adjusted and locked			
Automatic dampers operating			
Housing construction complete			
Access doors closed			
Condensate drain piping and pan			
Free from dirt and debris			
b) FILTERS			
Type and size			
Number			
Clean			
Frame - Leakage			
Temporary			
c) COILS (HYDRONIC)			
Size and rows			
Fin spacing and condition			
Obstruction and / or debris			
Airflow and direction			
Piping leakage			
Correct piping connections and flow			
Valves open or set			
Air vents or steam traps			
Provisions made for TAB measurements			

	Ready		Int.
	Yes	No	
d) COILS (ELECTRIC)			
Sizes and construction			
Airflow direction			
Duct connections			
Safety switches			
Contactors and disconnect switches			
Electrical service and connections			
Obstruction and / or debris			
e) FANS			
Rotation			
Wheel clearance and balance			
Bearing and motor lubrication			
Drive alignment			
Belt tension			
Drive set screws tight			
Belt guard in place			
Flexible duct connector alignment			
Starters and disconnect switches			
Electrical service and connections			
f) VIBRATION ISOLATION			
Springs and compression			
Base level and free			



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	Ready		Int.
	Yes	No	
2. Duct Systems			
a) GENERAL			
Manual dampers adjusted and locked			
Access doors closed and tight			
Fire dampers open and accessible			
Terminal units open or set			
Registers and diffusers open and set			
Turning vanes in square elbows			
Provisions made for TAB measurements			
Ductwork sealed as required			
b) ARCHITECTURAL			
Windows installed and closed			
Doors closed as required			
Ceiling plenums installed and sealed			
Access doors closed and tight			
Air shafts and openings as required			
3. Pumps			
a) MOTORS			
Rotation			
Lubrication			
Alignment			
Set screws tight			
Guards in place			
Starters and disconnect switches			
Electrical service and connections			

	Ready		Int.
	Yes	No	
b) PIPING			
Correct flow and connections			
Leakage			
Valves open or set			
Strainer clean			
Air vented			
Flexible connectors			
Cavitation possibilities			
c) BASES			
Vibration isolation			
Grouting			
Leveling			
4. Hydronic Equipment			
a) BOILERS			
Operating controls and devices			
Safety controls and devices			
Lubrication of fans and pumps			
Draft controls and devices			
Piping connections and flow			
Valves open or set			
Water make-up provisions			
Blow-down provisions			
Electrical connections			
b) HEAT EXCHANGERS			
Correct flow and connections			
Valves open or set			
Air vents or steam traps			
Leakage			
Provisions made for TAB measurements			



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	Ready		Int.
	Yes	No	
c) COOLING TOWERS AND EVAPORATIVE CONDENSERS			
Correct flow and connections			
Valves open or set			
Leakage			
Provisions made for TAB measurements			
Sump water level			
Spray nozzles			
Fan / pump rotation			
Motor / fan lubrication			
Drives and alignment			
Guards in place			
Starters and disconnect switches			
Electrical connections			
5. Refrigeration Equipment			
Crankcase heaters energized			
Operating and safety controls and devices			
Valves open or set			
Piping connections and flow			
Flexible connectors			
Oil level and lubrication			
Guards in place			
Vibration isolation			
Starters, contactors and disconnect switches			
Electrical connections			

	Ready		Int.
	Yes	No	
6. Hydronic Piping Systems			
Leak tested and flushed			
Fluid levels and make-up			
Relief or safety valve settings			
Compression tanks / air vented			
Steam traps and connections			
Strainers clean			
Valves open or set			
Provisions made for TAB measurements			
7. Control Systems			
Data centers operating			
Outdoor / return dampers set			
Economizer controls set			
Static pressure control set			
Space controls operating			
Complete system operating			
8. Other Checks			
a) Other trade or personnel notified of TAB work requirements			
b) Preliminary data complete			
c) Test report forms prepared			

The above checklist items have been verified complete: _____ YES / _____ NO



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SECTION 2 - 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			
Electrical Contractor			
PAC Consultant			
TAB Contractor			
NMPSFA RFM			
Manufacturer Rep.			