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Test, Adjust and Balance Readiness Checklist

Please complete the following prior to the arrival of the Air Solutions & Balancing technician who will be performing your T.A.B. The information you provide will help to verify the HVAC system is functional and meets the design criteria:

HVAC Units and Built –Up Units	READY			CORRECTED DATE/MISC
	YES	NO	N/A	
<i>General</i>				
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				
<i>Filters</i>				
Type and size				
Number				
Clean				
Frame-Leakage				
Temporary				
<i>Coils-Hydronic</i>				
Size and rows				
Fin spacing and condition				
Obstruction and/or Debris				
Airflow and direction				
Piping leakage				
Correct piping connection and flow				
Valves open or set				
Air vent or steam traps				
Provisions made for TAB measurements				



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<u>Coils</u>				
Sizes and construction				
Airflow direction				
Safety switches				
Contactors and disconnect switches				
Electrical service and connections				
Obstruction and/or debris				
<u>Fans</u>				
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 services and connections				
<u>Vibration Isolation</u>				
Springs and compression				
Base level and free				
<u>Duct Systems</u>	YES	NO	N/A	
<u>General:</u>				
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				



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<i>Architectural</i>				
Windows installed and closed				
Doors closed as required				
Ceiling plenums installed and sealed				
Access doors closed and tight				
Air shafts and openings as required				
<i>Pumps:</i>	YES	NO	N/A	
<i>Motors:</i>				
Rotation				
Lubrication				
Alignment				
Set screws tight				
Guards in place				
Starters and disconnect switches				
Electrical service and connections				
<i>Piping</i>				
Correct flow and connections				
Leakage				
Valves open or set				
Strainer cleaned				
Air vented				
Flexible connectors				
Cavitations possibilities				
<i>Bases:</i>				
Vibration isolation				
Grouting				
Leveling				
<i>Hydronic Equipment</i>	YES	NO	N/A	
<i>Boilers:</i>				
Operating controls and devices				
Safety controls and devices				
Lubrication of fans and pumps				
Draft controls and devices				



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Piping connections and flow				
Valves open and set				
Water make-up provisions				
Blow-down provisions				
Electrical connections				
<i>Heat Exchangers:</i>				
Correct flow and connections				
Valves open or set				
Air Vents or steam traps				
Leakage provisions made for TAB measurements				
<i>Cooling towers and evaporative condensers:</i>				
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				
<i>Refrigeration Equipment</i>	YES	NO	N/A	
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				



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Vibration isolation				
Starters, contactors and disconnect switches				
Electrical connections				
<i>Hydronic Piping Systems</i>	YES	NO	N/A	
Leak tested and flushed				
Fluid levels and make-up				
Relief or safety valve settings				
Compression tanks / air vented				
Steam traps and connections				
Strainers cleaned				
Valves open or set				
Provision made for TAB measurements				
<i>Control Systems</i>	YES	NO	N/A	
Data centers operating				
Outdoor/return dampers set				
Economizer controls set				
Static pressure control set				
Space controls operating				
Complete system operating				
<i>Other checks</i>	YES	NO	N/A	
Other trades/ personnel notified of TAB work requirements				

Additional items Air Solutions & Balance should be aware of:

Date: _____

Name: _____ Company: _____