B. General Maintenance Method of Procedure

**General Maintenance:** *In accordance with ASHRAE Standard 62.1* Table 8-1 Minimum Maintenance Activity and Frequency for Ventilation System Equipment.[4](#_bookmark0)

Verify coil condition, condensate drainage, cooling coil air temperature differential (entering and leaving dry bulb), heat exchanger operation, and drive assembly. Recommendations for additional maintenance, replacement or upgrades shall be recorded in the HVAC Assessment Report

1. All tests shall be completed in a safe manner by personal wearing personal protective equipment.

# Verify coil condition.

* 1. Note downstream and upstream condition.
	2. Note and document any damage.

# Verify condensate drainage.

* 1. Document if drain pan is functioning (removes water) or if maintaining, or showing signs of, stagnant water.
	2. Verify trap is installed and trap depth is correct per local code.
	3. Verify condensate drain line is intact and functional.

# Temperature Differential (Cooling Mode)

* 1. Measure and document cooling coil air temperature differential
		1. Obtain entering and leaving dry bulb temperatures.
	2. If applicable, measure GPM on hydronic systems.

# Temperature Differential (Heating Mode)

* 1. Measure and document air temperature differential
		1. Obtain entering and leaving dry bulb temperatures.

a. If applicable, measure GPM on hydronic systems.

1. **Verify condition of drive assembly**. (if applicable)
	1. Document sheave size, model, and number.
	2. Document belt size, model, and number.
	3. Note condition of all applicable components.

# Deficiencies

* 1. Document deficiencies, general condition of unit, and make recommendations for additional maintenance, replacement, or upgrades.

# Repairs and Adjustment.

* 1. Document Required Repairs and Adjustments
1. Include relevant photographic documentation.

*This document is intended to be used solely as an aide when developing the methods, procedures, and forms used in the Ventilation Verification and Energy Optimization Assessment. It is the responsibility of each contractor, supervisor, and technician to ensure that the methods, procedures, and forms used meet the requirements of the local mechanical codes. The National Energy Management Institute Committee makes no representations, whatsoever, that drafting procedures or forms based on this document will meet that requirement of local mechanical codes and expressly disclaims any liability or responsibility regarding the use of this document.*

4 *ANSI/ASHRAE Standard 62.1 Ventilation for Acceptable Indoor Air Quality*, 2022nd ed., ASHRAE, Peachtree Corners, GA, 2022,

pp. 32–33.

<https://www.ashrae.org/technical-resources/bookstore/standards-62-1-62-2>

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