



# Ventilation Checklist

Name: \_\_\_\_\_

School: \_\_\_\_\_

Unit Ventilator/AHU No: \_\_\_\_\_

Room or Area: \_\_\_\_\_ Date Completed: \_\_\_\_\_

Signature: \_\_\_\_\_

## Instructions

1. Read the *IAQ Backgrounder* and the Background Information for this checklist.
2. Keep the Background Information and make a copy of the checklist for **each** ventilation unit in your school, as well as a copy for future reference.
3. Complete the Checklist.
  - Check the “yes,” “no,” or “not applicable” box beside each item. (A “no” response requires further attention.)
  - Make comments in the “Notes” section as necessary.
4. Return the checklist portion of this document to the IAQ Coordinator.

## 1. OUTDOOR AIR INTAKES

- |  |     |    |     |
|--|-----|----|-----|
| 1a. Marked locations of all outdoor air intakes on a small floor plan (for example, a fire escape floor plan)..... | Yes | No | N/A |
| 1b. Ensured that the ventilation system was on and operating in “occupied” mode .....                              |     |    |     |

### TASK 1: OBSTRUCTIONS

- |  |     |    |     |
|--|-----|----|-----|
| 1c. Ensured that outdoor air intakes are clear of obstructions, debris, clogs, or covers .....                 | Yes | No | N/A |
| 1d. Installed corrective devices as necessary (e.g., if snowdrifts or leaves frequently block an intake) ..... |     |    |     |

### TASK 2: POLLUTANT SOURCES

- |  |     |    |     |
|--|-----|----|-----|
| 1e. Checked ground-level intakes for pollutant sources (dumpsters, loading docks, and bus-idling areas).....   | Yes | No | N/A |
| 1f. Checked rooftop intakes for pollutant sources (plumbing vents; kitchen, toilet, or laboratory exhaust fans; puddles; and mist from air-conditioning cooling towers)..... |     |    |     |
| 1g. Resolved any problems with pollutant sources located near outdoor air intakes (e.g., relocated dumpster or extended exhaust pipe).....                                   |     |    |     |

### TASK 3: AIRFLOW

- |   |     |    |     |
|---|-----|----|-----|
| 1h. Obtained chemical smoke (or a small piece of tissue paper or light plastic) ..... | Yes | No | N/A |
| 1i. Confirmed that outdoor air is entering the intake appropriately .....             |     |    |     |

## 2. SYSTEM CLEANLINESS

### TASK 4: AIR FILTERS

- |  |     |    |     |
|--|-----|----|-----|
| 2a. Replaced filters per maintenance schedule .....  | Yes | No | N/A |
| 2b. Shut off ventilation system fans while replacing filters (prevents dirt from blowing downstream) ..... |     |    |     |
| 2c. Vacuumed filter areas before installing new filters .....  |     |    |     |
| 2d. Confirmed proper fit of filters to prevent air from bypassing (flowing around) the air filter .....    |     |    |     |
| 2e. Confirmed proper installation of filters (correct direction for airflow).....                          |     |    |     |

## 2. SYSTEM CLEANLINESS (continued)

### TASK 5: DRAIN PANS

- |   | Yes                      | No                       | N/A                      |
|---|--------------------------|--------------------------|--------------------------|
| 2f. Ensured that drain pans slant toward the drain (to prevent water from accumulating) ..... | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2g. Cleaned drain pans.....   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2h. Checked drain pans for mold and mildew .....  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

### TASK 6: COILS

- |  |                          |                          |                          |
|--|--------------------------|--------------------------|--------------------------|
| 2i. Ensured that heating and cooling coils are clean ..... | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|--|--------------------------|--------------------------|--------------------------|

### TASK 7: AIR-HANDLING UNITS, UNIT VENTILATORS

- |   |                          |                          |                          |
|---|--------------------------|--------------------------|--------------------------|
| 2j. Ensured that the interior of air-handling unit(s) or unit ventilator (air-mixing chamber and fan blades) is clean ..... | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2k. Ensured that ducts are clean.....   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

### TASK 8: MECHANICAL ROOMS

- |  |                          |                          |                          |
|--|--------------------------|--------------------------|--------------------------|
| 2l. Checked mechanical room for unsanitary conditions, leaks, and spills .....                                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2m. Ensured that mechanical rooms and air-mixing chambers are free of trash, chemical products, and supplies ..... | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

## 3. CONTROLS FOR OUTDOOR AIR SUPPLY

- |  |                          |                          |                          |
|--|--------------------------|--------------------------|--------------------------|
| 3a. Ensured that air dampers are at least partially open (minimum position).....   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3b. Ensured that minimum position provides adequate outdoor air for occupants..... | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

### TASK 9: CONTROLS INFORMATION

- |   |                          |                          |                          |
|---|--------------------------|--------------------------|--------------------------|
| 3c. Obtained and reviewed all design inside/outside temperature and humidity requirements, controls specifications, as-built mechanical drawings, and controls operations manuals (often uniquely designed) ..... | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|---|--------------------------|--------------------------|--------------------------|

### TASK 10: CLOCKS, TIMERS, SWITCHES

- |   |                          |                          |                          |
|---|--------------------------|--------------------------|--------------------------|
| 3d. Turned summer-winter switches to the correct position .....                                       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3e. Set time clocks appropriately.....  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3f. Ensured that settings fit the actual schedule of building use (including night/weekend use) ..... | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

### TASK 11: CONTROL COMPONENTS

- |  |                          |                          |                          |
|--|--------------------------|--------------------------|--------------------------|
| 3g. Ensured appropriate system pressure by testing line pressure at both the occupied (day) setting and the unoccupied (night) setting.....                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3h. Checked that the line dryer prevents moisture buildup.....   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3i. Replaced control system filters at the compressor inlet based on the compressor manufacturer's recommendation (for example, when you blow down the tank) ..... | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3j. Set the line pressure at each thermostat and damper actuator at the proper level (no leakage or obstructions).....   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

### TASK 12: OUTDOOR AIR DAMPERS

- |  |                          |                          |                          |
|--|--------------------------|--------------------------|--------------------------|
| 3k. Ensured that the outdoor air damper is visible for inspection.....   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3l. Ensured that the recirculating relief and/or exhaust dampers are visible for inspection .....                                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3m. Ensured that air temperature in the indoor area(s) served by each outdoor air damper is within the normal operating range..... | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

*NOTE: It is necessary to ensure that the damper is operating properly and within the normal range to continue.*





### 3. CONTROLS FOR OUTDOOR AIR SUPPLY (continued)

- |   | Yes                      | No                       | N/A                      |
|---|--------------------------|--------------------------|--------------------------|
| 3n. Checked that the outdoor air damper fully closes within a few minutes of shutting off appropriate air handler .....   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3o. Checked that the outdoor air damper opens (at least partially with no delay) when the air handler is turned on .....  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3p. If in heating mode, checked that the outdoor air damper goes to its minimum position (without completely closing) when the room thermostat is set to 85°F.....  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3q. If in cooling mode, checked that the outdoor air damper goes to its minimum position (without completely closing) when the room thermostat is set to 60°F and mixed air thermostat is set to 45°F ..... | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3r. If the outdoor air damper does not move, confirmed the following items:   |                          |                          |                          |
| • The damper actuator links to the damper shaft, and any linkage set screws or bolts are tight.....   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Moving parts are free of impediments (e.g., rust, corrosion) .....  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • Electrical wire or pneumatic tubing connects to the damper actuator .....   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| • The outside air thermostat(s) is functioning properly (e.g., in the right location, calibrated correctly).....  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

*Proceed to Activities 13–16 if the damper seems to be operating properly.*

#### TASK 13: FREEZE STATS

- |   |                          |                          |                          |
|---|--------------------------|--------------------------|--------------------------|
| 3s. Disconnected power to controls (for automatic reset only) to test continuity across terminals.....  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| OR  |                          |                          |                          |
| 3t. Confirmed (if applicable) that depressing the manual reset button (usually red) trips the freeze stat (clicking sound indicates freeze stat was tripped)..... | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3u. Assessed the feasibility of replacing all manual reset freeze-stats with automatic reset freeze-stats .....   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

*NOTE: HVAC systems with water coils need protection from the cold. The freeze-stat may close the outdoor air damper and disconnect the supply air when tripped. The typical trip range is 35°F to 42°F.*

#### TASK 14: MIXED AIR THERMOSTATS

- |  |                          |                          |                          |
|--|--------------------------|--------------------------|--------------------------|
| 3v. Ensured that the mixed air stat for heating mode is set no higher than 65°F.....                       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3w. Ensured that the mixed air stat for cooling mode is set no lower than the room thermostat setting..... | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

#### TASK 15: ECONOMIZERS

- |  |                          |                          |                          |
|--|--------------------------|--------------------------|--------------------------|
| 3x. Confirmed proper economizer settings based on design specifications or local practices ..... | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|--|--------------------------|--------------------------|--------------------------|

*NOTE: The dry-bulb is typically set at 65°F or lower.*

- |  |                          |                          |                          |
|--|--------------------------|--------------------------|--------------------------|
| 3y. Checked that sensor on the economizer is shielded from direct sunlight.....  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3z. Ensured that dampers operate properly (for outside air, return air, exhaust/relief air, and recirculated air), per the design specifications ..... | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

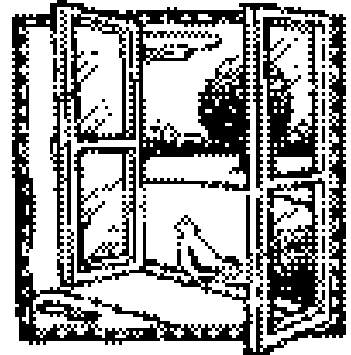
*NOTE: Economizers use varying amounts of cool outdoor air to assist with the cooling load of the room or rooms. There are two types of economizers, dry-bulb and enthalpy. Dry-bulb economizers vary the amount of outdoor air based on outdoor temperature, and enthalpy economizers vary the amount of outdoor air based on outdoor temperature and humidity level.*

### 3. CONTROLS FOR OUTDOOR AIR SUPPLY (continued)

#### TASK 16: FANS

- 3aa. Ensured that all fans (supply fans and associated return or relief fans) that move outside air indoors continuously operate during occupied hours (even when room thermostat is satisfied) .....  Yes  No  N/A

*NOTE: If fan shuts off when the thermostat is satisfied, adjust control cycle as necessary to ensure sufficient outdoor air supply.*



### 4. AIR DISTRIBUTION

#### TASK 17: AIR DISTRIBUTION

- 4a. Ensured that supply and return air pathways in the existing ventilation system perform as required.....
- 4b. Ensured that passive gravity relief ventilation systems and transfer grilles between rooms and corridors are functioning .....

*NOTE: If ventilation system is closed or blocked to meet current fire codes, consult with a professional engineer for remedies.*

- 4c. Made sure every occupied space has supply of outdoor air (mechanical system or operable windows) .....
- 4d. Ensured that supply and return vents are open and unblocked .....

*NOTE: If outlets have been blocked intentionally to correct drafts or discomfort, investigate and correct the cause of the discomfort and reopen the vents.*

- 4e. Modified the HVAC system to supply outside air to areas without an outdoor air supply .....
- 4f. Modified existing HVAC systems to incorporate any room or zone layout and population changes.....
- 4g. Moved all barriers (for example, room dividers, large free-standing blackboards or displays, bookshelves) that could block movement of air in the room, especially those blocking air vents .....
- 4h. Ensured that unit ventilators are quiet enough to accommodate classroom activities.....
- 4i. Ensured that classrooms are free of uncomfortable drafts produced by air from supply terminals .....

#### TASK 18: PRESSURIZATION IN BUILDINGS

*NOTE: To prevent infiltration of outdoor pollutants, the ventilation system is designed to maintain positive pressurization in the building. Therefore, ensure that the system, including any exhaust fans, is operating on the “occupied” cycle when doing this Task.*

- 4j. Ensured that air flows out of the building (using chemical smoke) through windows, doors, or other cracks and holes in exterior wall (for example, floor joints, pipe openings) .....

### 5. EXHAUST SYSTEMS

#### TASK 19: EXHAUST FAN OPERATION

- 5a. Checked (using chemical smoke) that air flows into exhaust fan grille(s) .....

*If fans are running but air is not flowing toward the exhaust intake, check for the following:*

- Inoperable dampers
- Obstructed, leaky, or disconnected ductwork
- Undersized or improperly installed fan
- Broken fan belt



## 5. EXHAUST SYSTEMS (continued)

### TASK 20: EXHAUST AIRFLOW

*NOTE: Prevent migration of indoor contaminants from areas such as bathrooms, kitchens, and labs by keeping them under negative pressure (as compared to surrounding spaces).*

- 5b. Checked (using chemical smoke) that air is drawn into the room **Yes No N/A**  
from adjacent spaces .....

*Stand outside the room with the door slightly open while checking airflow high and low in the door opening (see "How to Measure Airflow").*

- 5c. Ensured that air is flowing toward the exhaust intake .....

### TASK 21: EXHAUST DUCTWORK

- 5d. Checked that the exhaust ductwork downstream of the exhaust fan  
(which is under positive pressure) is sealed and in good condition .....

## 6. QUANTITY OF OUTDOOR AIR

### TASK 22: OUTDOOR AIR MEASUREMENTS AND CALCULATIONS

*NOTE: Refer to "How to Measure Airflow" for techniques.*

- 6a. Measured the quantity of outdoor air supplied (22a) to each ventilation  
unit .....
- 6b. Calculated the number of occupants served (22b) by the ventilation unit  
under consideration .....
- 6c. Divided outdoor air supply (22a) by the number of occupants (22b) to  
determine the existing quantity of outdoor air supply per person (22c).....

### TASK 23: ACCEPTABLE LEVELS OF OUTDOOR AIR QUANTITIES

- 6d. Compared the existing outdoor air per person (22c) to the recommended  
levels in Table 1 .....
- 6e. Corrected problems with ventilation units that supplied inadequate  
quantities of outdoor air to ensure that outdoor air quantities (22c)  
meet the recommended levels in Table 1 .....

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## NOTES