

The Air Conditioning Contractors of America (ACCA)

The only nationwide association representing the <u>technical</u>, <u>educational</u>, and <u>policy interests</u> of U.S. businesses that design, install and maintain indoor environmental systems



ACCA History

National Warm Air Heating and Air Conditioning Association (1914)

Air Conditioning and Refrigeration Contractors of America (1946)

National Environmental Systems Contractors Association (1968)

Air Conditioning Contractors of America (1969)

HVAC Contractor Competency Contributes to the HVAC Industries Poor Image

~10%. Do a proper job nearly all of the time.
~35%. Know what to do. But are constrained.

~25%. Think doing okay. Often fall short.

0%. Don't know, don't card

We talk about "raising the bar" ... but, we still have to "define the bar!"

Don's History

AA General Engineering Technology Montgomery College, MD

1st Class Stationary Engineer, MD

Licensed HVAC Contractor, FL

BS Mechanical Engineering Technology Thomas Edison State College, NJ



"Defining the Bar" Questions

What is a good HVAC contractor? What is a quality HVAC installation?

What makes one HVAC contractor more competent than another?

How can HVAC contractors demonstrate superior performance?

How can a home owner/builder identify/engage the services of a quality HVACR contractor?

How can a home owner/builder be assured that the quality installation paid for was obtained?





Purpose (Section 1)

The HVAC QI Specification:

establishes minimum criteria for use by stakeholders concerned with the proper installation, maintenance, and servicing of HVAC systems to meet occupant demands for energy efficiency, comfort, and IAQ in residential and commercial applications.



Scope (Section 2)

This specification applies to HVAC equipment/components being installed in residential and commercial buildings



That's a Broad Scope Is Anything Excluded?

Due to differing design aspects and control/operation situations, built-up systems (i.e., chillers, custom or specialty-built penthouse units, etc.) are not included in this specification. Buildings employing built-up systems are generally designed by architects or professional engineers. Additionally, commercial buildings using built-up equipment are more likely to benefit from increased owner scrutiny via building commissioners, owner agents, etc.



QI Divides HVAC Equipment Into 3 Main Categories

- Unitary air conditioners, air-source/watersource heat pumps and geothermal heat pumps
- 2) Furnaces
- 3) Boilers





Boilers (gas-fired, oil-fired, electric, and other)



Design Aspects (Section 3)

This Section focuses on the upfront design procedures/tasks undertaken before the equipment is actually installed.



Ventilation (Section 3.1)-

The contractor shall ensure that ventilation calculations are performed for every HVAC system installation/replacement

Building ventilation requirements (outside air, exhaust air and building pressurization) are performed to recognized standards, codes, or requirements.

(For example: ASHRAE 62.1 or ASHRAE 62.2)



Loads Types: Heat Gain and Heat Loss Calculations (Section 3.2)

Block Load

- Peak Block Load
- Avg. Room Load
- Peak Room Load
- System Loads
 Duct Loads
 - Ventilation Load
 - Humidification Loads
 - Dehumidification Loads
 - Blower Heat Load
 - Infiltration Loads
 - Internal Loads

Building Heat Gain / Loss Load Calculations (Section 3.2)

The contractor shall ensure:

For NEW CONSTRUCTION, or when adding ducts to an existing structure, room-by-room heat gain/loss load calculations are completed Or

For EXISTING CONSTRUCTION, without contractor modification of the existing duct system, block load heat gain/loss load calculations are completed.



R. Hall

QI's Acceptable Procedures For Load Calculations

Manual J8 or Manual N5





QI's Additional Acceptable Procedures

ASHRAE Handbook Guidelines, DOE Energy Plus™ Or Other approved equivalents per the authority having jurisdiction Or Confirm that the calculations were performed by a gualified third party

Proper Equipment Capacity Selection (Section 3.3)

The contractor shall ensure that all equipment is properly sized and selected prior to being installed

Help, I need a Manual J for the equipment I installed so my customer will qualify for the rebate



Proper Equipment Capacity Selection (Section 3.3)

For CENTRAL AIR CONDITIONERS and HEAT PUMPS - the selected equipment will satisfy the building 's load requirement at design conditions.



Central Air Conditioner / Heat Pump Sizing Requirements

95% and 125% total cooling requirements (for heat pumps with heating dominated requirements). Or

the next largest nominal piece of equipment per OEM increment that is available to satisfy the latent and sensible requirements.

Central Air Conditioner / Heat Pump Sizing Requirements

i. OEM product data demonstrates that latent requirements are addressed.

And

A D D

- ii. Total equipment capacity is between: 95% and 115% of total cooling requirements
 - (for air conditioners and heat pumps). Or



Gas/Oil-Fired Warm Air Systems and Boiler Sizing Requirements

For gas-fired or oil fired WARM AIR SYSTEMS and HEATING BOILERS – the heating capacity of the selected equipment will satisfy the heating requirement at design conditions





Gas/Oil-Fired Warm Air Systems and Boiler Sizing Requirements

- i. WARM AIR SYSTEMS output capacity between 100% and 140% of calculated system load unless dictated by the cooling equipment selection.
- ii. HEATING BOILERS equipment capacity between 100% and 115% of calculated system load, OR the next largest nominal piece of equipment that is available.

Acceptable Sizing Procedures (Section 3.3.2)

Using OEM performance information and industry-approved procedures (e.g., ACCA Manual S_{\odot} for residential applications, ACCA Manual CS_{\odot} for commercial applications, OEM guidelines, or other approved equivalent per the authority having jurisdiction)





Geothermal Heat Pump Ground Heat Exchanger (Section 3.4)

The contractor shall observe industry design practices for the proper design of the exterior ground heat exchanger.

American Society of Heating, Refrigerating and Air-Conditioning Engineers (ASHRAE) International Ground Source Heat Pump Association (IGSHPA)

National Ground Water Association (NGWA) Original Equipment Manufacturer's guidance



Matched Systems (Section 3.5)

The contractor shall ensure that all evaporators, condensing units, and furnaces are properly matched systems as identified by industry-recognized certification programs.





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Geothermal Heat Pump Ground Heat Exchanger (Section 3.4)

i. The ground interface heat exchanger fluid temperatures [extremes] and flow rates used as the basis for design equipment capacity are within the range specified in OEM guidelines.

And

ii. The ground heat exchange design methodology incorporates:

- Building loads and total installed equipment capacity
- Ground heat exchanger type, materials, and soil geometry



- Soil thermal characteristics
- Climatic characteristics of project location

QI Approved System Matching Methods

AHRI Product Certification directory/database CEE directory of AHRI-verified equipment

www.ahridirectory.org

www.ceedirectory.org



Equipment Installation Aspects (Section 4)

Airflow Through Indoor Heat Exchangers Water Flow Through Heat Exchangers Refrigerant Charge Electrical requirements On-Rate for Fuel-Fired Equipment Combustion Venting System System Controls

Airflow Through Indoor Heat Exchangers (Section 4.1)

The contractor shall provide evidence of the following for the measured airflow across the indoor heat exchanger for installed systems (with all accessories and system components in place):



Evidence For Gas-Oil Fired Heat Exchanger Applications

 Airflow, across the heat exchanger, at fan design speed and full operating load, is within 15% of the airflow required per the system design,

And

ii. Airflow across the indoor heat exchanger is within the range recommended by the OEM product data.

And

QI Section 4 Equipment Installation Aspects

The Contractor shall verify that the airflow through the indoor blower unit (e.g. furnace, fan coil, air handler) is within acceptable CFM ranges.



Evidence For Cooling Coils

- i. Airflow across the coil, at fan design speed and full operating load, is within 15% of the airflow required per the system design. and
- ii. Airflow across the coil or fan unit is within the range recommended by the OEM product data. and
- iii. Measured external static pressure (ESP) is:
 - 1. Within OEM specified acceptable range, and
 - Not more than 25% or 0.10 iwc (which ever is greater) over the calculated ESP used to design



the duct system [exception for existing buildings: measured ESP is not required for change-out applications if there has been no modification to the pre-existing ductwork.]

Evidence For Gas-Oil Fired Heat Exchanger Applications

iii. Heat exchanger airflow requirements shall be considered separately from any combined and attached cooling coils sharing the same <u>distribution duct</u> system design,

And

- iv. Measured external static pressure (ESP) is:
 - 1. Within OEM specified acceptable range, and
 - 2. Not more than 25% or 0.10 iwc (which ever is greater) over the calculated ESP used to design the duct system [exception for existing buildings: measured ESP is not required for change-out applications if there has been no modification to the pre-existing ductwork.]





Water Flow Through Indoor Heat Exchangers (Section 4.2)

The contractor shall verify that the water flow through the refrigerant-to-water, water-to-water, or water-to-air heat exchanger are within acceptable ranges.



Water Pressure Drop Method

Or

Water Temperature Change Method Or

Any method approved and specifically by the OEM that can be used to determine water flow rate



| | Water Pressure Dro | p (in feet @ 180°F) | |
|-----|--------------------|---------------------|--------|
| CDV | 007.4 | COLLB | 007.0 |
| GPM | COIL A | COIL B | COIL C |
| 2 | 0.4 | 0.4 | 0.5 |
| 4 | 1.4 | 1.6 | 1.7 |
| 6 | 3.0 | 3.3 | 3.7 |
| 8 | 5.2 | 5.7 | 6.3 |
| 10 | 7.9 | 8.7 | 9.6 |



Other Methods

Any method approved and specifically stated by OEM that can be used to determine the water flow rate.

Water Temperature Change Method

Table 4.4: Flow Rate and Pressure Drop for Various System Temperature Rise Values

| | | | | | | Flor | w Rate & | Pressure I | Drop | | | | |
|-----|------------|-------|-------|-------|-------|--------|----------|------------|-------|--------|-------|--------|-------|
| | ΔT (°F) | PF-50 | | PF-80 | | PF-110 | | PF-140 | | PF-210 | | PF-399 | |
| (1) | (1) | CPM | FT | GPM | FT | GPM | FT | GPM | FT | GPM | FT | GPM | FT |
| | 40 | 1.3 | 2.17 | 3.7 | 3.92 | 5.1 | 3.74 | 6.5 | 2.70 | 9.6 | 6.23 | 18.7 | 4.97 |
| | 35 | 2.6 | 2.72 | 4.2 | 4.95 | 5.8 | 4.75 | 7.4 | 3.51 | 11.0 | 7.69 | 21.3 | 6.38 |
| | 30 | 1.1 | 3.54 | 4.9 | 6.49 | 6.7 | 6.27 | 8.7 | 4.75 | 12.8 | 9.81 | 24.9 | 8.50 |
| | 25 | 1.7 | 4.83 | 5.8 | 8.95 | 8.1 | 8.70 | 10,4 | 6.80 | 15.4 | 13.09 | 29.8 | 11.93 |
| | 20 | 4.6 | 7.06 | 7.3 | 13.25 | 10.1 | 12.99 | 13.0 | 10.55 | 19.2 | 18.63 | 37.3 | 18.08 |
| | 15 | i.1 | 11.52 | 9.7 | 21.97 | 13.5 | 21.78 | 17.3 | 18.58 | 25.6 | 29.35 | 49.7 | 30.90 |
| | 10 | 9.2 | 22.97 | 14.6 | 44.81 | 20.2 | 45.11 | 26.0 | 41.26 | 38.4 | 55.71 | 74.6 | 65.74 |





Refrigerant Charge (Section 4.3)

The contractor shall ensure that the HVAC system has the proper refrigerant charge.

Acceptable Procedures:

- Superheat
- Subcooling
- OEM approved methods







Superheat Method

System refrigerant charging per OEM charging data/instructions and within \pm 5°F of the OEM recommended optimal refrigerant charge.



Subcooling Method

System refrigerant charging per OEM charging data/instructions and within ± 3°F of the OEM-recommended optimal refrigerant charge.



Other OEM Approved Methods

Any method approved and specifically stated by the OEM that will ensure proper refrigerant charging of the system



Electrical Requirements (Section 4.4)

The contractor shall ensure all electrical requirements are met as related to the installed equipment.

- Line and Low Voltages
- Amperages
- Wiring Sizes
- Grounding/Bonding per NEC or Equivalent.



Amperages

Amperages per equipment (single and three-phase) rating plate - the percentage (or amount) below or above nameplate values are within OEM specifications and/or code requirements.

Line and Low Voltages

Per equipment (single and three-phase) rating plate - the percentage (or amount) below or above nameplate values are within OEM specifications and/or code requirements



Wiring Sizes **Grounding / Bonding** GROUNDING / BONDING per NEC or equivalent. LINE and LOW-VOLTAGE wiring sizes per NEC (National Electric Code) or equivalent. **On-Rate for Fuel Fired Gas-Fired Equipment Equipment** (Section 4.5) The contractor shall ensure the equipment "on-rate" Firing rate within \pm 5% of nameplate input for (BTU/H input during steady-state operation) for gas-fired gas equipment (or per OEM specifications). or oil-fired equipment is at the equipment name plate value. Temperature rise per nameplate. **Acceptable Procedures for Oil-Fired Equipment Gas-Fired Equipment** The contractor shall test using both of the following acceptable procedures for fulfilling the Correct nozzle flow rate and spray angle for desired criteria: correct firing rate per nameplate input. Clocking the meter or other fuel input Correct oil pump pressure for nozzle installed measurement per OEM instructions. and at OEM's specified values. Measuring the temperature rise at steady state Temperature rise per nameplate.

- conditions (with airflow first verified by §4.1) furnaces only.
- Combustion analysis for gas and oil-fired equipment if required by the OEM must be performed.





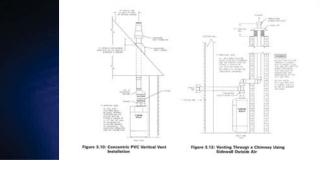
Acceptable Procedures for Oil-Fired Equipment

The contractor shall fulfill the following criteria:

- Verify nozzle or alternate input nozzle per OEM installation or oil burner instructions.
- Verify oil pump pressure with a dial or electronic gauge designed for oil pressure measurement.
- Measure the temperature rise at steady-state conditions (with airflow first verified by §4.1) –furnaces only.
- Perform a combustion analysis per OEM installation or oil burner instructions.
- Combustion analysis is necessary when setting up an oil burner. Additionally, new oil-fired equipment no longer standardizes the pump pressure at 100 psig. Hence, incorrect pump pressure may result in an incorrect input rate for the equipment.

Combustion Venting System (Section 4.6)

The Contractor shall ensure proper sizing, design, material selection and assembly of the combustion gas venting system.



Requirements For Combustion Venting

The contractor shall provide evidence of compliance with the following:

- CATEGORY I vent system sized per OEM instructions and the National Fuel Gas Code (NFGC, NFPA 54) or
- CATEGORY I vent system sized per OEM instructions and the International Fuel Gas Code (IFGC) or
- CATEGORY II, III and IV vent system sized per OEM instructions and
- CATEGORY II, III and IV vent system sized per required local code.





Acceptable Procedures

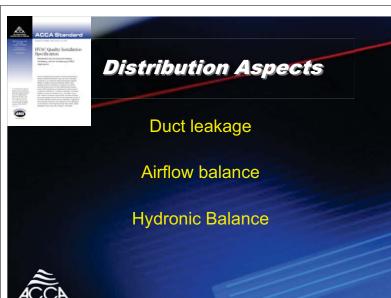
Comparison of the actual installation's venting system's performance to appropriate fuel gas venting tables for Category I vent systems.

Comparison of the actual installation's venting system's performance to appropriate OEM instructions, for Category II, III and IV vent systems.



The contractor shall ensure:

- a) Operating controls and safety controls are compatible with the system type and application, and the selected controls are consistent with OEM recommendations and industry practices, and
- b) Operating controls and safety controls lead to proper sequencing of equipment functions, with all controls and safeties functioning per OEM or customer design specifications



Duct leakage (Section 5.1)

NEW residential / commercial buildings:

- Ducts located inside conditioned space:
 ≤ 10% total leakage at 25 Pascals
- Ducts outside thermal envelope:
 ≤ 6% total leakage at 25 Pascals or
- per Energy Star™ guidance (new homes)

EXISTING residential / commercial buildings:

• ≤ 20% total leakage at 25 Pascals, or

A

- 50% reduction of existing airflow leakage or
- per local code requirement (if meet / exceed above)

ACCEPTABLE DUCT LEAKAGE TESTING PROCEDURES

The contractor shall test using one or more of the following acceptable procedures for fulfilling the desired criteria:

Duct pressurization test at 25 Pascals Or

For commercial buildings: airflow comparison method Or

Hybrid Blower door / airflow measuring device subtraction

Differential Air Totals

Or

Duct pressurization test referenced pressure standard by authority having jurisdiction.

DUCT PRESSURIZATION TESTS



Blower Door Airflow Measuring Device

Airflow balance (Section 5.2)

For NEW CONSTRUCTION or addition of new ducts to an existing structure:

Residential: $\pm 20\%$ or ± 25 CFM of design / application requirements for supply and return ducts

Commercial: ±10% or ±25 CFM of design / application requirements for supply and return ducts





Airflow balance (Section 5.2)

For EXISTING CONSTRUCTION without contractor modification of existing ductwork: No additional ACCA QI requirements apply. Or

For NEW or EXISTING CONSTRUCTION the airflow balance is per local code or authority having jurisdiction.



ACCEPTABLE PROCEDURES FOR AIR BALANCING

a) Airflow Measuring Device (AMD) used per specifications from the AM manufacturer.

[Commonly referred to as flow hood™, Shortridge or Balometer™ Alnor (trade marked names).]

- b) Duct Traverse with Pitot tube and manometer per procedures specified by ACCA, AABC, ASHRAE, NEBB, SMACNA, or TABB.
- c) Measure average flow using an anemometer (hot wire, rotary) per specifications from the



test equipment manufacturer.

Airflow Measuring Device AMD used per specifications from the AMD manufacturer.



Traverse with Anemometer

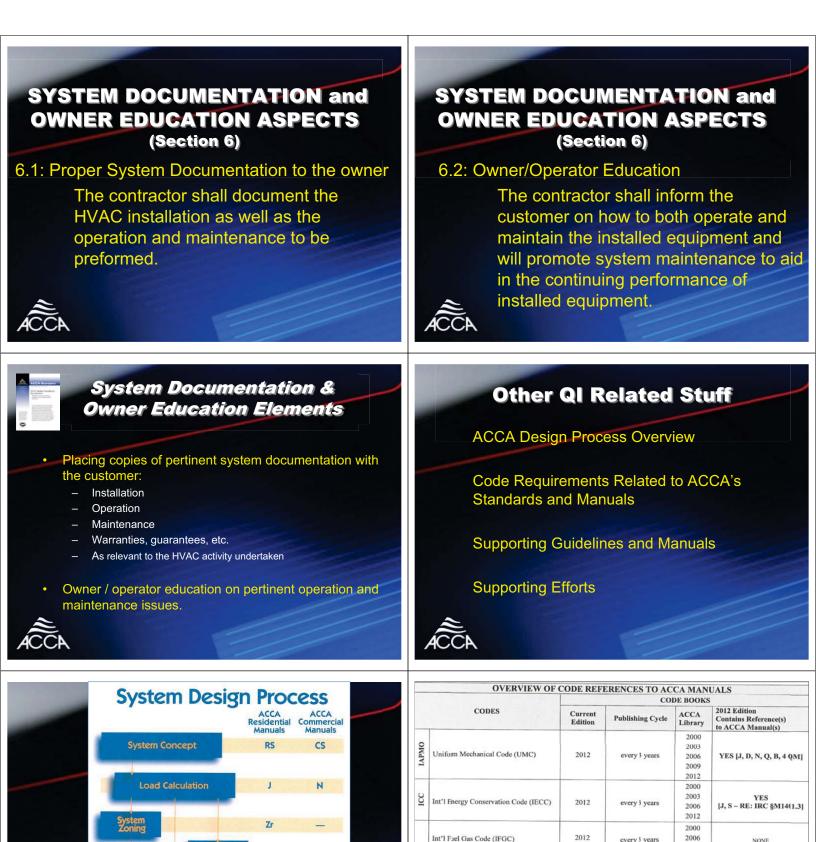
€0.321 di

←0.679 d ←0.865 dia ← 0.032 dia ← 0.135 dia

Traverse with a Manometer







Air Distribution

Duct Size

Adjust, Test, Balance

Equipment Selection Т

S

D

B

Q

CS

Q

B

2012

2000

2009 2012

2000

2003

2006

2009

No

2012

every J years

every 3 years

every 5 years

YES [Manual D]

YES [J, S, D]

YES

Manual D. RE: IBC

§M2801]

2012

2012

2012

Int'l Mechanical Code (IMC)

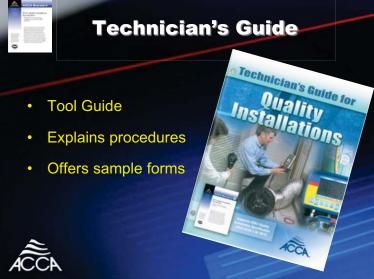
Int'l Residential Code (IRC)

Int'l Building Code (IBC)

ICC

| DETAILED CODE REFERENCES TO ACCA MANUALS | | | | | DETAILED CODE REFERENCES TO ACCA MANUALS | | | | | |
|---|-------------------------------|---------|---|--|--|---|---------|---|--|--|
| Code Body | Code | Edition | ACCA Reference | Code Statement | Code Body | Code | Edition | ACCA Reference | Code Statement | |
| International Association of Plumbing and Mechanical Officials | Uniform Mechanical Code | 2012 | 2012 UMC §1106.1 [Manual J8 Residential Load Calculation-8 th Ed.] 2012 UMC §1106.1 [Manual N Commercial Load | 1106.1 Human Comfort (GENERAL REQUIREMENTS): Cooling equipment used for human comfort in dwelling units shall be sized to satisfy the calculated loads determined in accordance with the reference standards in Chapter 17, or other approved methods. d 501.2 Sizing Requirements (DUCT SYSTEMS): Duct systems used with blower-type equipment that are portions of a heating, cooling, absorption, evaporative cooling, or outdoor-air ventilation system shall be sized in accordance with Chapter 17, or by other approved methods". Chapter 17 Standards Table 17-1 Standards for Equipment and Materials et - RESIDENTIAL LOAD CALCULATION, ACCA MANUAL J 2006 eRESIDENTIAL DAD CALCULATION, ACCA MANUAL D 2009 - COMMERCIAL LOAD CALCULATION, ACCA MANUAL N 2008 | International Code Counci | International Residential Code | 2009 | (2012 IRC §M1401.3) [Manual J Residential Load Calculation – B th Ed.] (2012 IRC §M1401.3) [Manual S Residential Equipment, Selectico] (2012 IRC §M1601.1) [Manual D Residential Duct Systems] | M1401.3 — Sizing: Heating and cooling equipment shall be sized in accordance with ACCA Manual S based on building loads calculat in accordance with ACCA Manual J or other approved heating are cooling calculation methodologies. M1601.1 — Daet Design: Duet systems serving heating, cooling and ventilation equipment shall be fabricated in accordance with the provisions of this section and ACCA Manual D or other approved methods. M1602.2 — Prohibited Sources: Outside or return air for a forved-a beating or cooling system shall not be taken from the following locations: A room or space, the volume of which is less than 25 percent Where connected by a permanent opening having an area sized in accordance with ACCA Manual D, adjoining rooms. | |
| | | | 2012 UMC §601.2 [Manual D Residential Duct Systems] 2012 UMC §601.2 [Manual Q Low Pressure Low Velocity Duct Systems Design] | | | International Energy Conservation Code | 2009 | 2012 IECC \$403.6 and \$404.6.1.2 [Manual J8 Residential Load Calculation-4 th E-di, [2012 IRC \$414-01.0] [Manual S Residential Equipment Selection] | 403.6 Equipment string: Heating and cooling equipment shall se sized in accordance with Section 1401.3 of the International Reidensis Code. (Manual J and S) 404.6.1.2 Calculation software tools: Calculation of whole-building (as a single) sizing for the heating and cooling equipment in the standard reference design residence in accordance with Section 101.3 of the International Reidensial Code. (Manual J and S) | |
| | | | | | | International Mechanical Code | 2009 | 2012 IMC §603.2 [Manual D Residential Duct Systems] | 603.2 Duct Sizing Ducts installed within a single dwelling unit shall be sized in accordance with ACCA Manual D or other approved methods. | |
| | | | | ACCA MANUAL Q 2003 - BALANCING AND TESTING AIR AND HYDRONIC SYSTEMS, ACCA MANUAL B 2009 - MAINTENANCE OF RESIDENTIAL HVAC SYSTEMS, ACCA 4 QM-2007 | | International Building Code | 2009 | 2012 IBC §2801.1 [Manual J8 Residential Load Calculation-8 th Ed.] 2012 IBC §2801.1 [Manual D Residential Duct Systems] 2012 IBC §2801.1 [Manual S Residential Equipment Selection] | 2801.1 Scope. Mechanical appliances, equipment and systems thall be constructed, installed and maintained in accordance with the International Mechanical Code and the International Fuel Gas Code. | |

CA standard E



Other Supporting Efforts ...

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Systems

- Minimum inspection requirements
- Recommended corrective actions

Restoring System Cleanliness of HVAC Systems

- Establishes Cleaning Criteria
- Restoration Protocols
- Post Cleaning Verification

HVAC Quality Installation Verification Protocols

 Instructions for QI program implementers



