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A/E Checklist: 12 Questions to Ask Before Issuing HVAC Documents for Field Verification

A practical pre-issue screen for HVAC documents that need to survive TAB, commissioning, final inspection, and owner handover.

#	Question	Why it matters	If the answer is no
1	Is the governing code path and applicable standard framework confirmed?	Verification expectations change when the compliance path or local enforcement approach changes.	The team may design to the wrong documentation and testing burden.
2	Are the Owner's Project Requirements and Basis of Design clear enough to anchor performance expectations?	Weak intent creates interpretation battles later in controls, TAB, and closeout.	The project inherits avoidable RFIs and scope ambiguity.
3	Does each critical requirement have a visible verification path?	A requirement is fragile if it has no linked design artifact, test method, and evidence output.	The field has to invent how compliance will be proven.
4	Are ventilation calculations inspection-ready, not just permit-ready?	Outdoor-air compliance often fails when the calculation exists but the evidence path does not.	Final review may ask for proof the team cannot produce cleanly.
5	Is the outdoor-air measurement basis explicitly shown?	A damper position is not airflow proof.	Minimum ventilation becomes difficult to verify in operation.
6	Can minimum outdoor air be proven at minimum VAV flow or low-load conditions?	Ventilation failures often hide in low-flow modes.	The system may pass one condition and fail the one that matters at testing.
7	Are economizer modes and test conditions explicitly described?	Economizer logic is a common closeout friction point.	The team cannot clearly force or verify the required behavior.
8	Do sequences define states, entry conditions, actions, priorities, and measurable outcomes?	Narrative intent is not the same thing as testable logic.	Controls contractors and commissioning providers will interpret the sequence differently.
9	Is there an interlock matrix or equivalent clarity for safety, protection, and comfort priorities?	Interlocks and sequences must describe the same system.	Conflicts emerge late and testing becomes unsafe or inconclusive.
10	Are balancing dampers, test ports, temperature wells, and measurement points accessible?	Testability depends on reach, not theory.	TAB and Cx labor rises while result quality drops.
11	Are service clearances, access openings, and removal paths dimensioned and coordinated?	Maintainability and testability are linked.	The building may technically fit the equipment but not support verification or service.
12	Are final evidence deliverables named in the documents?	Owners, Cx providers, and AHJs need a defined acceptance package.	Closeout becomes a scramble instead of a controlled handover.

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How to use this checklist

Use this tool at design development and again immediately before issue. Mark any “no” answer as a design-risk item, not an administrative note. The objective is not to create more paper. The objective is to stop preventable interpretation gaps from reaching the field.

A strong rule of thumb: if the project cannot show how a requirement will be measured, accessed, forced, and repeated, the verification chain is still incomplete.

High-risk red flags

Red flags that deserve immediate attention:
- outdoor-air compliance based only on damper position
- long narrative sequences with no pass/fail criteria
- access left to “field coordinate”
- no listed evidence package for turnover
- controls, TAB, and commissioning scopes written as separate stories

Next step

Use this checklist before issue and again at close coordination milestones. A short review upstream is far cheaper than field interpretation downstream.