



FREE CLIENT RESOURCE

HVAC & Home Performance Verification Readiness Guide

A practical procurement and field guide for blower-door, duct-leakage, airflow,
and TAB decisions.

USE THIS BEFORE YOU HIRE A TESTING PROVIDER

Choose the right test, define the test conditions, request a usable report, and separate a correctable field issue from a decision that needs design, safety, or code review.

For homeowners, owners, general contractors, and trade partners who want evidence - not just a passing statement.

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Start with the performance question

Testing has value only when the test method, conditions, target, and report answer a defined project question. A blower door and TAB report are different tools. Neither alone proves a building is code-compliant, healthy, comfortable, or ready for occupancy.

If the question is...	Start with...	Ask for this output
Where is the house leaking, and did air-sealing work change it?	Whole-house air-tightness / blower-door testing	Documented test setup, result metric, leakage observations, and before/after comparison when applicable.
Are ducts leaking or disconnected?	Duct-leakage test plus visual verification	Test method, system/duct boundary, measured result, defect locations, and retest evidence.
Does the HVAC system deliver the intended airflow and outdoor air?	Airflow verification or TAB scoped to the actual system	Design/reference basis, measured vs. required values, final settings, deficiencies, and responsible-party closeout.
Do controls, safety interlocks, or specialty spaces perform as intended?	Commissioning, functional testing, or specialty-qualified testing	Approved sequence/test procedure, witness requirements, results, deficiencies, and closeout record.

DO NOT BUY A GENERIC PASS/FAIL

Before authorizing a test, require the provider to identify the governing requirement in writing: contract or specification, adopted code/AHJ direction, energy-program rule, manufacturer instruction, or an agreed project objective. A number without that source is not an acceptance criterion.

Five questions that prevent an unusable test

1. What decision will this test support: permit, energy program, correction scope, equipment startup, warranty, closeout, or owner baseline?
2. Which building or HVAC boundary is included, and what is excluded? State zones, duct systems, units, attached garages, vents, and conditioned/unconditioned areas.
3. What conditions must be in place before testing, and what temporary conditions are allowed?
4. What reference governs acceptance, including edition/date and any local amendment or program requirement?
5. Who receives the raw readings, final report, open-item list, and retest confirmation - and who pays to correct a deficiency?



Lane A: blower-door / air-tightness readiness

A blower door measures whole-building air leakage and helps locate leakage paths. It does not by itself prove duct tightness, mechanical-ventilation adequacy, combustion safety, moisture performance, or code compliance. Treat the test as a building-envelope diagnostic and acceptance record, not as a substitute for a complete project review.

Before the appointment

Confirm	Why it matters	Owner / contractor action
Test purpose and target source	The same home can be tested for diagnosis, a rating/program, or a project requirement; setup and reporting expectations can differ.	Provide the applicable contract, program, or jurisdictional reference. Do not ask the tester to infer the target.
Test boundary	Attached garages, crawlspaces, attics, additions, and unit separations can change what is being measured.	Mark the intended conditioned boundary on a simple plan and identify any shared/adjacent spaces.
Safety and operating condition	Air-moving equipment and combustion appliances require an intentional test setup; unsafe or atypical conditions can make data unreliable.	Disclose fuel-burning appliances, fireplaces, dryers, exhaust systems, fresh-air equipment, and occupied residents before the visit.
Construction stage	A rough diagnostic and final acceptance test answer different questions.	State whether the test is pre-drywall, pre-insulation, post-air-sealing, final, or a retest.
Access and repair loop	A report has little value if observations cannot be assigned and corrected while access remains open.	Keep access to attic, mechanical, garage, and exterior conditions available; schedule a retest path before final finishes.

Ask the provider to state

- The test standard or program protocol used, instrument identification/calibration status if required, test setup, and site conditions that could affect interpretation.
- The reported metric, the reference/target used, whether the result is preliminary or final, and whether a direct before/after comparison is valid.
- Observed leakage locations in plain language, distinguishing a suspected path from a verified opening where possible.
- Any limitation: inaccessible areas, temporary sealing, weather/pressure concerns, safety restriction, incomplete enclosure, or condition outside the tested boundary.

SAFETY STOP

Pause and obtain qualified direction before depressurization testing if there is a known fuel-gas leak, active combustion/venting concern, unsafe appliance condition, significant water intrusion, smoke-control/life-safety system, or an occupied critical environment. A performance test must not create a safety event.



Lane B: HVAC airflow verification and TAB readiness

Testing, adjusting, and balancing (TAB) is a structured process used to measure, adjust, and document air and water system performance against a defined design or operating basis. On a simple residence, the needed scope may be focused airflow, duct, ventilation, or startup verification rather than a full commercial-style TAB report. The scope must match the system and the decision.

Do not schedule final TAB until the system is ready

Readiness item	Evidence the test team needs	Typical consequence if missing
Approved basis	Current plans/schedules, equipment data, design airflow/ventilation values, and any sequence or specification.	Measured values cannot be compared to a traceable target.
Installed and accessible system	Complete ducts, terminals, filters, dampers, access doors, piping/valves as applicable, and equipment identification.	Testing becomes partial; final settings may be disturbed by later work.
Startup and controls	Electrical complete, equipment started, controls operational, sensors/actuators addressed, and intended operating modes available.	A technician can record readings but cannot verify the operating condition that matters.
Construction coordination	Ceilings/shafts closed only after needed access is protected; owner, GC, installer, controls, and TAB responsibilities known.	Corrective work becomes slow, expensive, or undocumented.
Acceptance and closeout	Specified tolerances/criteria, deficiency process, report format, review party, and retest responsibility.	The report may identify exceptions but leave no path to resolution.

Minimum scope request for an HVAC verification provider

- Identify every included unit, system, zone, terminal, exhaust point, outside-air device, and control mode. Include a plan or equipment list.
- State the design/reference values and the source document revision. If values are unknown, scope discovery and design review separately from final acceptance testing.
- Require measured values, final damper/valve/fan/control settings where applicable, instrument method, deficiencies, corrective recommendations, and retest results.
- Coordinate the report with startup and commissioning. TAB verifies specified/measurable performance; functional testing verifies that sequences and controls respond as intended.



Copy/paste scope request: testing provider

Use this in a bid request, subcontract exhibit, or email. Fill the blanks before sending. It is a procurement aid, not a substitute for a project specification or professional scope.

Field	Project-specific entry
Project / address	Project name, address, building/unit, and contact: _____
Decision to support	Permit / program / correction scope / startup / owner baseline / closeout: _____
Requested service	Blower-door / duct-leakage / focused airflow / TAB / functional test: _____
Included boundary	Conditioned area, systems, zones, units, ducts, and exclusions: _____
Governing reference	Contract/spec, adopted-code/AHJ direction, program rule, manufacturer instruction, or objective: _____
Required test stage	Pre-drywall diagnostic / post-air-sealing / startup / final / retest: _____
Required report	Setup/conditions, values, target, limits, deficiencies, settings, markups, retest: _____
Correction / retest path	Responsible party, response time, access constraints, and retest terms: _____

BID COMPARISON RULE

Compare scope before price. A lower quote may omit the report, the target/reference, field observations, repeat visit, coordination meeting, or retest. If two proposals do not describe the same boundary and deliverables, they are not comparable.

What the final report should let you answer

- What exactly was tested, when, under which relevant conditions, and using which method?
- What value was measured, what was the governing target/reference, and does the provider describe the result as preliminary, final, or limited?
- What specific deficiencies or limitations remain, who owns each correction, and is a retest required?
- Can a future owner, AHJ reviewer, engineer, or warranty reviewer trace the result back to a plan, system, location, and decision?



Field verification record

Print or save this page before the site visit. It keeps the test connected to the work that follows.

Record item	Field entry
Project / area	
Date / test provider	
Service ordered	
Governing source and target	
Construction / operating stage	
Conditions or limits disclosed	
Result reported	
Deficiency / location / evidence	
Corrective owner and due date	
Retest required? / evidence retained	

Stop and escalate when

- The test result is presented without a stated boundary, method, test condition, or requirement source.
- The report target conflicts with contract documents, the adopted code path, an energy program, manufacturer instructions, or a responsible professional's direction.
- A deficiency requires changing equipment capacity, combustion/venting, outdoor air, pressure relationships, controls, fire/smoke systems, rated construction, or another regulated condition.
- The project is a healthcare, laboratory, commercial kitchen, hazardous-exhaust, smoke-control, or other critical environment. Those systems need project-specific qualification and may require specialty testing beyond this guide.

PRACTICAL VALUE

Use measured evidence to close the right issue while access still exists. Do not use a passing statement to hide a missing design basis, an untested control mode, or a system change that needs written authorization.



Technical boundary and references

This guide helps a non-specialist procure and use testing evidence. It does not establish the applicable code, acceptance threshold, test protocol, professional design, permit approval, safety certification, or AHJ determination for any project. Verify the adopted code, amendments, program rules, contract documents, manufacturer instructions, site conditions, and qualified professional direction before acting.

Selected public references

ENERGY STAR - Blower Door Test glossary: Defines blower-door testing as a way to measure air-tightness and locate leakage paths. [View source](#)

RESNET - Whole-House Infiltration Testing technical bulletin: Describes the importance of consistent test setup, measurement, and reporting under the RESNET/ICC air-tightness testing framework. [View source](#)

ENERGY STAR - HVAC Quality Installation: Explains why correct airflow, refrigerant charge, and duct evaluation matter to HVAC comfort and performance. [View source](#)

NEBB - TAB Procedural Standard overview: Explains that TAB procedures use a systematic baseline and that contract documents may impose stricter project requirements. [View source](#)

U.S. DOE - Energy assessments: Notes that blower-door and infrared methods can be used to identify energy-loss opportunities and support recommendations. [View source](#)

Need help interpreting a report or setting a project-ready scope?

MasterBuild Consulting can provide a scoped MEP review when the decision involves design intent, ventilation, equipment/controls coordination, existing conditions, construction changes, or a jurisdictional/permit path. Start with the project facts, the current documents, and the actual test report.

KEEP THE EVIDENCE

Retain the proposal, scope, governing requirement, test report, deficiency log, correction record, and retest confirmation with the project closeout file. That record is more valuable than an isolated result number.



OWNER TO CONTRACTOR TESTING & VERIFICATION CHECKLIST

Use this as the shared action list before, during, and after testing. Check each item only when the stated evidence exists. It requests traceable performance evidence; it does not establish a code target or change scope without written authorization.

PROJECT / SENDER	CONTRACTOR / RESPONSE
Project / address: _____	Company / contact: _____
Sender / role: _____	Requested response date: _____
Date sent: _____	Testing coordinator: _____

HOW TO USE

The owner, architect, or client checks the middle column before authorizing the next step. The responsible contractor or testing provider completes the next-action column. Keep the required evidence with the project record.

OK	OWNER / ARCHITECT / CLIENT CHECK	CONTRACTOR / PROVIDER ACTION	PROOF TO RETAIN
[]	Define the decision: diagnosis, permit/program, startup, correction, final closeout, or owner baseline.	Confirm the exact test service and whether the task is diagnostic, interim, final, or retest.	Written purpose and requested test stage.
[]	Provide the verified requirement source; do not rely on a verbal target.	Identify the controlling document, revision, target, and any stated tolerance or protocol.	Contract/spec, drawing, AHJ/program direction, manufacturer instruction, or written objective.
[]	Confirm what is included: building areas, systems, zones, ducts, exhaust, outdoor air, and exclusions.	Mark the proposed test boundary and disclose limits, shared spaces, and inaccessible conditions.	Plan markup, equipment list, or written boundary statement.
[]	Confirm readiness, access, occupants, construction stage, and special safety conditions.	Verify access and safe test setup; stop for unsafe combustion/fuel-gas, life-safety, or critical-environment conditions.	Readiness confirmation and safety limitation, if any.
[]	Approve provider, proposed date, report recipient, and retest path before work starts.	Name the qualified provider; confirm scope, fee assumptions, deliverables, corrective owner, and retest terms.	Proposal / work order and confirmed appointment.
[]	On test day, confirm the provider tested the approved boundary and recorded material limitations.	Document setup, conditions, instrument method, observations, readings, and any test interruption.	Field notes, photos/markups where useful, and raw readings if required.
[]	Review the result against the verified source. Ask questions if boundary, method, target, or limitation is unclear.	Issue a report identifying scope, method, result, requirement source/target, limitations, deficiencies, and responsible party.	Complete final report and deficiency log.
[]	Do not call the item closed until corrective work and any required retest are documented.	Assign correction, complete repair, arrange retest where required, and deliver closure evidence.	Correction evidence, retest result, and final closeout location.

OWNER DECISION RULE

A numerical result alone is not acceptance evidence. Pause and obtain qualified direction when the test basis is unknown, the boundary changes, safety conditions prevent a valid test, the result conflicts with project documents, or the correction affects design, ventilation, controls, permit path, or life safety.

FINAL ACKNOWLEDGMENT	DATE / NAME
Responsible contractor acknowledges this checklist and will identify any scope, schedule, cost, safety, access, or requirement-source issue before proceeding.	Date: _____ Name / title: _____



CONTRACTOR & TESTING PROVIDER CHECKLIST

Use this shared checklist to obtain comparable proposals, prepare the site, perform a valid test, and deliver a report the owner can actually use. Complete project-specific fields from verified documents before release.

PROJECT / REQUESTOR	TEST PROVIDER / RESPONSE
Project / address: _____	Company / contact: _____
Requestor / role: _____	Provider qualification / credential: _____
Bid / response due: _____	Proposed field date: _____

SCOPE CONTROL

The contractor/requestor and provider should check each line together. If a requirement source, access condition, safety condition, or acceptance target is missing, identify it in writing before a final test is scheduled.

OK	CONTRACTOR / REQUESTOR CHECK	TESTING PROVIDER ACTION	OWNER-USEFUL PROOF
[]	State the decision supported and select the service: blower-door, duct-leakage, airflow, TAB, functional test, or other.	Confirm the service, protocol, included visit(s), assumptions, and whether the task is diagnostic, interim, final, or retest.	Proposal that states what the test will and will not prove.
[]	Provide the verified requirement source, document revision, and target/acceptance criterion where one exists.	Quote the supplied source; do not infer an acceptance target. Flag missing or conflicting information.	Requirement-source reference and any stated limitation.
[]	Identify included units, zones, ducts, terminals, exhaust, outdoor air devices, building areas, and exclusions.	Confirm the actual test boundary, shared conditions, access needs, and all exclusions before field mobilization.	Written boundary and system/equipment list.
[]	Confirm construction stage; installed/access-ready conditions; startup and controls status; occupants; and correction access.	Verify readiness before testing and document temporary conditions that affect validity or finality.	Readiness record and deferred-item list.
[]	Disclose fuel-burning appliances, fuel-gas concerns, smoke/life-safety systems, critical environments, and special hazards.	Use a safe procedure; stop and escalate conditions that prevent a safe or valid test.	Safety limitation or stop-work notice, if applicable.
[]	Agree report recipient, required delivery date, corrective owner, fee for repeat visit/retest, and file location.	Provide method/setup, conditions, results, requirement source/target, settings where applicable, observations, limits, deficiencies, and retest result.	Complete report, field observations, and deficiency log.
[]	Review findings before concealment, turnover, or final payment; assign corrections in writing.	Identify what must be corrected, who owns it, whether retesting is needed, and what prevents final acceptance.	Corrective-action log with owner and due date.
[]	Confirm closure only after correction and any required retest evidence is received and filed.	Issue retest confirmation or clearly identify remaining open limitations.	Final result, retest evidence, and closeout record.

COMPARABLE BID AND CLOSEOUT RULE

Compare scope before price. Proposals are not comparable if they test different boundaries or omit the report, requirement source, observations, deficiency log, coordination, repeat visit, or retest. Testing does not replace engineering design review, AHJ interpretation, commissioning authority direction, or contractor quality control.

AUTHORIZATION / ESCALATION	DATE / NAME
Scope accepted by: _____ Written scope change required for: _____	Date: _____
Final report recipient / file location: _____	Name / title: _____



TEST RESULT REVIEW & CLOSEOUT WORKSHEET

Use after a blower-door, duct-leakage, airflow, TAB, commissioning, or specialty test. Check each line before treating the report as decision-ready. A result is not final merely because a number appears on a report.

PROJECT / REVIEWER	TEST / REPORT
Project / address: _____	Test service / provider: _____
Owner / reviewer: _____	Test date: _____
Review date: _____	Report date / revision: _____

USE THIS WORKSHEET

The left column is the owner's review question. The middle column describes the minimum evidence to find in the provider's report. The right column records the next decision, not just a pass/fail label.

OK	OWNER REVIEW QUESTION	DECISION-READY EVIDENCE	NEXT ACTION / OWNER
☐	What decision was this test meant to support: diagnosis, permit/program, startup, correction, final closeout, or owner baseline?	The report states the purpose and identifies the verified requirement source or written project objective.	Decision: _____ Owner: _____
☐	Was the correct building or system boundary tested?	Included areas, units, zones, ducts, terminals, exhaust, outdoor air devices, exclusions, and shared conditions are stated.	Clarify boundary: _____ Owner: _____
☐	Were setup and site conditions suitable for this decision?	Method/protocol, test setup, material operating/construction conditions, access limits, temporary sealing, and safety limitations are identified.	Clarify conditions: _____ Owner: _____
☐	Can the measured result be compared to a verified target without guessing?	Measured values, units, stated target/tolerance, source, and whether the result is diagnostic, interim, final, or retest are clear.	Accept / clarify: _____ Owner: _____
☐	Do observations identify the actual issue and responsible corrective path?	Deficiency location/description, limitation, responsible party, due date, and corrective recommendation or escalation path are documented.	Correction owner: _____ Due: _____
☐	Is a retest required before closure?	The report clearly states retest status, retest scope/conditions, final result, and any remaining open limitations.	Retest date / status: _____ Owner: _____
☐	Can the record be found and understood later by the owner, contractor, engineer, AHJ, or warranty reviewer?	Final report, supporting photos/markups where useful, corrective-action log, and retest record have a known project file location.	File location: _____ Reviewer: _____

DO NOT ACCEPT FINAL CLOSEOUT YET WHEN

The report omits the requirement source, boundary, method, conditions, result units, limitations, deficiency ownership, or retest status; the result conflicts with project documents; or the correction affects design, ventilation, controls, permit path, combustion safety, smoke/life-safety, or an occupied critical environment. Obtain qualified direction before proceeding.

CLOSEOUT DECISION	DATE / NAME
☐ Accepted as documented ☐ Clarification required ☐ Correction / retest required ☐ Design, AHJ, or safety escalation required	Date: _____ Name / title: _____