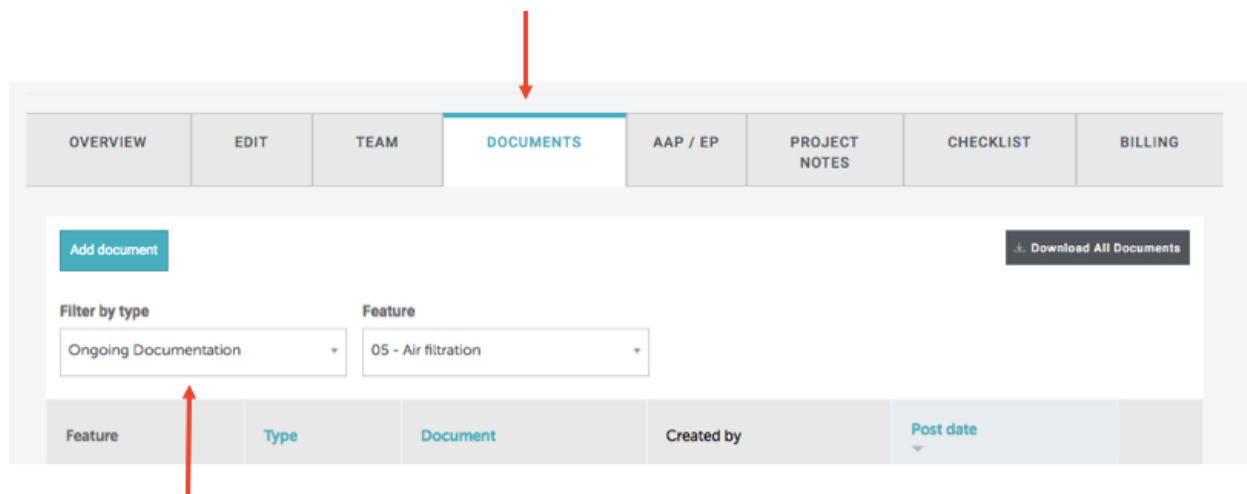




ANNUAL REPORTING PACKAGE

SAMPLE DOCUMENTATION

To confirm your building or space continues to meet WELL features designed to support human health and well-being, the International WELL Building Institute™ (IWBI™) requires annual reporting for several WELL features. This document is a guide for creating the documentation that project teams are required to submit annually. These annual reporting documents must be uploaded to the project's WELL account within the Documents tab. When uploading these files, project teams will select “Ongoing Documentation” as the document type.



The screenshot shows the 'DOCUMENTS' tab selected in the top navigation bar. Below the navigation bar, there is a section with filters and a table. The 'Filter by type' dropdown is set to 'Ongoing Documentation'. The 'Feature' dropdown is set to '05 - Air filtration'. The table below has columns: Feature, Type, Document, Created by, and Post date.

How to use this document:

Annual documentation is required for the following WELL features. This document provides an example of documentation for each:

- Feature 05 Air Filtration – Part 3 (Precondition for all project types)
- Feature 06 Microbe and Mold Control – Part 1b (Precondition for all project types)
- Feature 18 Air Quality Monitoring and Feedback – Part 1 (Optimization)
- Feature 23 Advanced Air Purification – Part 3 (Optimization)

- Feature 35 Periodic Water Quality Testing – Part 1 (Optimization)
- Feature 36 Water Treatment – Part 4 (Optimization)
- Feature 86 Post-Occupancy Surveys – Part 2 (Precondition for New & Existing Buildings, New & Existing Interiors, and Educational Facilities)

While one example is provided for each feature, other formats and approaches are also acceptable. This document is meant to demonstrate an acceptable degree of detail for documentation submission. Ultimately, the level of detail provided by teams when creating documentation is at their discretion. While this document includes examples of documentation that are not meant to be copied, your project team may find templates for ongoing maintenance logs and/or data collection in the excel document titled *Annual Reporting Package – Templates*.

The sample documentation reflects the Q1 2020 addenda version of the WELL Building Standard. Please note that this might differ from the addenda version that your project was certified under. However, these examples are still applicable to your project for annual reporting purposes. It is recommended that the project team use the final WELL report and project checklist as reference to confirm the feature requirements that were met during the initial WELL Certification and should be maintained through each annual reporting submission.

Disclaimer

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FEATURE 05: AIR FILTRATION

PART 3: AIR FILTRATION MAINTENANCE

To verify that the filtration system continues to operate as designed, projects must annually provide IWBI with:

- a. Records of air filtration maintenance, including evidence that filters have been properly maintained as per the manufacturer's recommendations.

SAMPLE OPERATIONS SCHEDULE

The building is equipped with the following filters in the following locations:

Filter type/model: MERV 13 Filter

Filter location: Basement air handling unit

<< ADD MORE FILTERS IF APPLICABLE >>

According to the manufacturer(s), <<INSERT NAME>>, the filter should be inspected every <<INSERT TIME>> and replaced at least every <<INSERT TIME>> (e.g. inspected every month and replaced every three months, or sooner where necessary). Thus, a member of the facilities operations team will check the manometer reading each month and replace when needed. Records of maintenance are to be logged on <<INSERT COMPANY PLATFORM>> and uploaded to our WELL account each year on <<INSERT DATE>> (e.g. Jan. 5.)

Air Filtration Replacement Log

Date	Location	Product	Designee	Action / Notes
1/5/2017	Basement AHU	MERV 13 Filter	e.g. John Smith	Filter reading indicates that filter is functioning at intended capacity.
2/5/2017	Basement AHU	MERV 13 Filter	John Smith	Filter reading indicates that filter is functioning at intended capacity.
3/5/2017	Basement AHU	MERV 13 Filter	John Smith	Filter replaced.
4/5/2017	Basement AHU	MERV 13 Filter	John Smith	Filter reading indicates that filter is functioning at intended capacity.
4/5/2017	Basement AHU	MERV 13 Filter	John Smith	Filter reading indicates that filter is functioning at intended capacity.
6/5/2017	Basement AHU	MERV 13 Filter	John Smith	Filter replaced.
7/5/2017	Basement AHU	MERV 13 Filter	John Smith	Filter reading indicates that filter is functioning at intended capacity.

8/5/2017	Basement AHU	MERV 13 Filter	John Smith	Filter reading indicates that filter is functioning at intended capacity.
9/5/2017	Basement AHU	MERV 13 Filter	John Smith	Filter replaced.
10/5/2017	Basement AHU	MERV 13 Filter	John Smith	Filter reading indicates that filter is functioning at intended capacity.
11/5/2017	Basement AHU	MERV 13 Filter	John Smith	Filter replaced.
12/5/2017	Basement AHU	MERV 13 Filter	John Smith	Filter reading indicates that filter is functioning at intended capacity.
1/5/2018	Basement AHU	MERV 13 Filter	John Smith	Filter replaced and 2017 maintenance logs uploaded to WELL account.

FEATURE 06: MICROBE AND MOLD CONTROL

PART 1B: COOLING COIL MOLD REDUCTION

In buildings that rely on a mechanical system for cooling, one of the following requirements is met

- a. Ultraviolet lamps (using a wavelength of 254 nm so as not to generate ozone) are employed on the cooling coils and drain pans of the mechanical system supplies. Irradiance reaching the cooling coil and drain pan, including the plenum corners, is modeled.
- b. **Building policy states that all cooling coils are inspected on a quarterly basis for mold growth and cleaned if necessary. Dated photos demonstrating adherence are provided to the IWBI on an annual basis.**

SAMPLE OPERATIONS SCHEDULE

The operations schedule should be accompanied by policy language in order to meet verification requirements. The below language is an excerpt from the building maintenance policy and has been communicated to all members of the maintenance and operations teams.

Microbe and Mold Control Policy

Mechanical cooling systems must meet be maintained according to the following protocol:

1. On the 5th of January, 5th of April, 5th of July and 5th of October, the cooling coils are inspected for mold growth by a member of the facility operations team.
2. This employee must record the date and time of inspection on facility cleaning logs (excerpt provided below) within facility maintenance dashboard of <<INSERT COMPANY NAME>> intranet software.
3. This employee must also capture a photo of each cooling coil and store the image within the facility maintenance dashboard of <<INSERT COMPANY NAME>> intranet software under the name “Coil#X_MONTH_YEAR.”
4. Any signs of discoloration, water damage or pooling must be reported immediately to <<INSERT NAME>> at <<555-555-5555>>, who will conduct a thorough cleaning within 24 hours.
5. On January 5th of each year, these photos are consolidated into a single PDF, titled “Mold_Inspections_YEAR” and uploaded to your WELL account.

Facility Operations Team – Cooling Coil Inspections

Date	Location	Signs of Mold	Inspection Notes	Photo Title / Link	Inspector
10/5/2017	Lobby	No.		“Coil#1_OCT_2017.”	John Smith
	Floor 1	No.		“Coil#2_OCT_2017.”	

	Floor 2	Yes.	Signs of water damage reported to <<INSERT NAME>>, cleaning scheduled for 10/6/2017 at 8 am.	"Coil#3_OCT_2017."	
	Floor 3	No.		"Coil#4_OCT_Y2017."	
1/5/2018	Lobby	No.	Photos uploaded to WELL account	"Coil#1_JAN_2018."	John Smith
	Floor 1	No.		"Coil#2_JAN_2018."	
	Floor 2	No.		"Coil#3_JAN_2018."	
	Floor 3	No.		"Coil#4_JAN_2018."	
4/5/2018	Lobby				
	Floor 1				
	Floor 2				
	Floor 3				
7/5/18	Lobby				
	Floor 1				
	Floor 2				
	Floor 3				
10/5/2018	Lobby				
	Floor 1				
	Floor 2				
	Floor 3				

FEATURE 18: AIR QUALITY MONITORING AND FEEDBACK (OPTIMIZATION)

PART 1: INDOOR AIR MONITORING

Monitors measure 2 of the following pollutants in a regularly occupied or common space (minimum one per floor) within the building, at intervals no longer than once an hour (measured at 1.2-1.8 m [4-6 ft] above the floor), and results are annually transmitted to the IWBI:

- a. Particle count (resolution 35,000 counts per m³ [1,000 counts per ft³] or finer) or particle mass (resolution 10 µg/m³ or finer).
- b. Carbon dioxide (resolution 25 ppm or finer).
- c. Ozone (resolution 10 ppb or finer).

SAMPLE DATA SUBMISSION

The project possesses an indoor air monitor on each floor of the building, which measures the following pollutants at each hour:

<< MUST INCLUDE AT LEAST 2 OF THE POLLUTANTS FROM PART 1, INDOOR AIR MONITORING >>

1. _____
2. _____

<< LIST ADDITIONAL POLLUTANTS IF APPLICABLE >>

NOTE: The images below are example of what this data MIGHT look like. If your project collects and tracks data in a different manner, simply submit that data as annual documentation. The submitted documentation should include access to all data gathered for the entire year.

	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
9			January			February			March			April			May		
10	Day	Hour	Particle Count/Mass	CO2	Ozone	Particle Count/Mass	CO2	Ozone	Particle Count/Mass	CO2	Ozone	Particle Count/Mass	CO2	Ozone	Particle Count/Mass	CO2	Ozone
11	1	0:00															
12	1	1:00															
13	1	2:00															
14	1	3:00															
15	1	4:00															
16	1	5:00															
17	1	6:00															
18	1	7:00															
19	1	8:00															
20	1	9:00															
21	1	10:00															
22	1	11:00															
23	1	12:00															
24	1	13:00															
25	1	14:00															
26	1	15:00															
27	1	16:00															
28	1	17:00															
29	1	18:00															
30	1	19:00															
31	1	20:00															
32	1	21:00															
33	1	22:00															
34	1	23:00															
35	2	0:00															
36	2	1:00															
37	2	2:00															
38	2	3:00															
39	2	4:00															
40	2	5:00															
41	2	6:00															
42	2	7:00															
43	2	8:00															
44	2	9:00															
45	2	10:00															
46	2	11:00															
47	2	12:00															
48	2	13:00															
49	2	14:00															
50	2	15:00															
51	2	16:00															
52	2	17:00															
53	2	18:00															
54	2	19:00															

OR

FEATURE 23: ADVANCED AIR PURIFICATION (OPTIMIZATION)

PART 3: AIR QUALITY MAINTENANCE

As evidence that the selected filtration/sanitation system chosen continues to be fully operational, projects must annually provide IWBI with:

- a. Records of air filtration/sanitization maintenance, including evidence that the filter and/or sanitizer has been properly maintained as per the manufacturer's recommendations.

SAMPLE OPERATIONS SCHEDULE: CARBON FILTRATION

Carbon Filtration

To reduce VOCs in the indoor air, the building is equipped with <<INSERT PRODUCT NAME>> carbon filters in the <<INSERT LOCATION>> (e.g. the main air ducts, a specific floor or a specific room). According to the manufacturer, <<INSERT NAME>>, the filters should be inspected every month and replaced at least every <<INSERT TIME>> (e.g. every three months), or sooner where necessary. Thus, a member of the facilities operations team will check the manometer reading each month and replace when needed. Records of maintenance are to be logged on <<INSERT COMPANY PLATFORM>> and uploaded to our WELL account each year on <<INSERT DATE, (e.g. January 5th.)>>

Date	Location	Product	Actions Taken	Action Frequency	Inspector
1/5/2017	Conference room	Carbon filter XXX	Filter inspected - reading indicates no replacement currently needed.	Monthly	John Smith
	Floor 3 -Open office	Carbon filter XXX	Filter inspected - reading indicates no replacement currently needed.	Monthly	
	Wellness Café	Carbon filter XXX	Filter inspected - reading indicates no replacement currently needed.	Monthly	
2/5/2017	Conference room	Carbon filter XXX	Filter replaced.	Monthly	John Smith
	Floor 3 -Open office	Carbon filter XXX	Filter replaced.	Monthly	
	Wellness Café	Carbon filter XXX	Filter inspected - reading indicates no replacement currently needed.	Monthly	
3/5/2017	Conference room	Carbon filter XXX	ilter inspected - reading indicates no replacement currently needed.	Monthly	John Smith

	Floor 3 -Open office	Carbon filter XXX	Filter reading indicates that filter is functioning at intended capacity.	Monthly	
	Wellness Café	Carbon filter XXX	Filter replaced.	Monthly	
4/5/2017		...	...		
5/5/2017		...	...		
6/5/2017		...	...		
7/5/2017		...	...		
8/5/2017		...	...		
9/5/2017		...	...		
10/5/2017		...	...		
11/5/2017		...	...		
12/5/2017		...	...		
1/5/2018		...	2017 maintenance logs must be uploaded to WELL account.		

SAMPLE OPERATIONS SCHEDULE: AIR SANITIZATION

Air Sanitization:

To treat the recirculated air, the building is equipped with <<EITHER ULTRAVIOLET GERMICIDAL IRRADIATION OR PHOTOCATALYTIC OXIDATION>> in the <<INSERT LOCATION>> (e.g. the central ventilation system, a specific floor or a specific room). According to the manufacturer, <<INSERT NAME>>, the sanitization technology should be cleaned with an antimicrobial product every month to remove dust on the lamp surface. Lamps should be replaced at least every <<INSERT TIME (e.g. every three months)>>, in order to maintain intended strength. Records of maintenance are to be logged on <<INSERT COMPANY PLATFORM>> and uploaded to our WELL account each year on <<INSERT DATE>> (e.g. January 5th).

Ultraviolet Germicidal Irradiation Operation Schedule:

Date	Location	Product	Actions Taken	Action Frequency	Inspector
1/5/2017	Air Duct – Floor 1	UGI Device XXX	Lamps were cleaned with <<NAME>> antimicrobial product. No dust is visible on the surface and lamp is functioning at intended capacity.	Monthly	John Smith
	Air Duct – Floor 2	UGI Device XXX	Bulbs were replaced.	Monthly	

	Cooling Coil and Drainage Pans – Floor 1	UGI Device XXX	Lamps were cleaned with <<NAME>> antimicrobial product. No dust is visible on the surface and lamp is functioning at intended capacity.	Monthly	
	Cooling Coil and Drainage Pans – Floor 2	UGI Device XXX	Lamps were cleaned with <<NAME>> antimicrobial product. No dust is visible on the surface and lamp is functioning at intended capacity.	Monthly	
2/5/2017	Air Duct – Floor 1	UGI Device XXX	Bulbs were replaced.	Monthly	John Smith
	Air Duct – Floor 2	UGI Device XXX	Lamps were cleaned with <<NAME>> antimicrobial product. No dust is visible on the surface and lamp is functioning at intended capacity.	Monthly	
	Cooling Coil and Drainage Pans – Floor 1	UGI Device XXX	Lamps were cleaned with <<NAME>> antimicrobial product. No dust is visible on the surface and lamp is functioning at intended capacity.	Monthly	
	Cooling Coil and Drainage Pans – Floor 2	UGI Device XXX	Lamps were cleaned with <<NAME>> antimicrobial product. No dust is visible on the surface and lamp is functioning at intended capacity.	Monthly	
3/5/2017	Air Duct – Floor 1	UGI Device XXX	Lamps were cleaned with <<NAME>> antimicrobial product. No dust is visible on the surface and lamp is functioning at intended capacity.	Monthly	John Smith
	Air Duct – Floor 2	UGI Device XXX	Lamps were cleaned with <<NAME>> antimicrobial product. No dust is visible on the surface and lamp is functioning at intended capacity.		
	Cooling Coil and Drainage Pans – Floor 1	UGI Device XXX	Bulbs were replaced.		

	Cooling Coil and Drainage Pans – Floor 2	UGI Device XXX	Bulbs were replaced.		
4/5/2017					
5/5/2017					
6/5/2017		...	...		
7/5/2017		...	...		
8/5/2017		...	...		
9/5/2017		...	...		
10/5/2017		...	...		
11/5/2017		...	...		
12/5/2017		...	...		
1/5/2018		...	2017 maintenance logs must be uploaded to WELL account.		

FEATURE 35: PERIODIC WATER QUALITY TESTING (OPTIMIZATION)

PART 1: QUARTERLY TESTING

All water being delivered to the project area for human consumption is tested quarterly (with reports submitted annually to the IWBI) for the presence of the following dissolved metals or metalloids:

- a. Lead.
- b. Arsenic.
- c. Mercury.
- d. Copper.

SAMPLE OPERATIONS SCHEDULE

The building is equipped with <<INSERT AMOUNT>> (e.g. four) drinking water fixtures. According to the WELL Performance Verification Guidebook, at least 10% of all drinking water fixtures must be tested quarterly. If this approach is to be pursued, the sampling points should rotate each quarter, so that new fixtures are sampled each quarter. At our facility, however, we have chosen to sample all four fixtures each quarter in order to guarantee the highest quality drinking water to our occupants.

<<INSERT STAFF MEMBER OR PRIVATE COMPANY >> conducts the quarterly testing for the presence of lead, arsenic, mercury and copper. The results are tracked on the facility maintenance dashboard and submitted to WELL account annually. The 2018 testing data appears below.

	Contaminant			
	Lead	Arsenic	Mercury	Copper
WELL Threshold	< 0.01 mg/L.	< 0.01 mg/L.	< 0.002 mg/L.	< 1.0 mg/L.

Date	Location	Lead	Arsenic	Mercury	Copper
1/5/18	Floor 1	0.001	0.001	0.001	0.1
	Floor 2	0.002	0.002	0.001	0.2
	Floor 3	0.001	0.002	0.001	0.1
	Café	0.002	0.001	0.0005	0.1
4/5/18	Floor 1	0.001	0.002	0.001	0.1
	Floor 2	0.001	0.002	0.0015	0.2
	Floor 3	0.001	0.003	0.001	0.1
	Café	0.002	0.002	0.0015	0.15
7/5/18	Floor 1	0.001	0.001	0.0016	0.1
	Floor 2	0.001	0.001	0.0015	0.21
	Floor 3	0.002	0.002	0.0015	0.1
	Café	0.001	0.001	0.001	0.15
10/5/18	Floor 1	0.001	0.002	0.001	0.1
	Floor 2	0.001	0.003	0.0015	0.2
	Floor 3	0.0012	0.001	0.001	0.1
	Café	0.001	0.002	0.001	0.1

FEATURE 36: WATER TREATMENT (OPTIMIZATION)

PART 4: WATER QUALITY MAINTENANCE

To verify that the selected filtration/sanitation system chosen continues to operate as designed, projects must annually provide the IWBI with:

- a. Record-keeping for a minimum of 3 years, including evidence that the filter and/or sanitizer has been properly maintained as per the manufacturer's recommendation.

SAMPLE OPERATIONS SCHEDULE

Activated Carbon Filter

Addressed in WELL Building Standard Feature 36, Part 1

To remove organic chemicals from water intended for human consumption, the building is equipped with <<INSERT PRODUCT NAME>> activated carbon filters in the <<INSERT LOCATION (e.g. the sinks, drinking fountains or ice machines on a specific floor or in a specific room)>>. According to the manufacturer, <<INSERT NAME>>, the filters should be inspected every <<INSERT TIME (e.g. every month)>> and replaced at least every <<INSERT TIME (e.g. every three months)>>, or sooner where necessary. Thus, a member of the facilities operations team will inspect the filters each month and replace when needed. Records of maintenance are to be logged on <<INSERT COMPANY PLATFORM>> and uploaded to our WELL account each year on <<INSERT DATE, (e.g. January 5th)>>. These records are kept for a minimum of three years.

Date	Location	Product	Actions Taken	Action Frequency	Designee
1/5/2017	Drinking fountains - Open office	Carbon Filter XX	Inspection. No replacements currently needed.	Monthly.	John Smith
	Drinking fountains - Reception	Carbon Filter XX	Inspection. No replacements currently needed	Monthly.	
	Sink – Café	Carbon Filter XX	Inspection. No replacements currently needed	Monthly.	
	Supply lines – Café	Carbon Filter XX	Inspection. No replacements currently needed	Monthly.	
2/5/2017	Drinking fountains - Open office	Carbon Filter XX	Filters replaced.	Monthly.	John Smith

	Drinking fountains - Reception	Carbon Filter XX	Filters replaced.	Monthly.	
	Sink – Café	Carbon Filter XX	Filters replaced	Monthly.	
	Supply lines – Café	Carbon Filter XX	Filters replaced	Monthly.	
3/5/2017	Drinking fountains - Open office	Carbon Filter XX	Inspection. No replacements currently needed	Monthly.	John Smith
	Drinking fountains - Reception	Carbon Filter XX	Inspection. No replacements currently needed	Monthly.	
	Sink – Café	Carbon Filter XX	Inspection. No replacements currently needed	Monthly.	
	Supply lines – Café	Carbon Filter XX	Inspection. No replacements currently needed	Monthly.	
4/5/2017					
5/5/2017					
6/5/2017					
7/5/2017					
8/5/2017					
9/5/2017					
10/5/2017					
11/5/2017					
12/5/2017					
1/5/2018				2017 maintenance logs must be uploaded to WELL account.	

Sediment Filter

Addressed in WELL Building Standard Feature 36, Part 2

To remove suspended solids (with pore size 1.5 μm or less) from water intended for human consumption, the building is equipped with <<INSERT PRODUCT NAME>> sediment filters in the <<INSERT LOCATION (e.g. the sinks, drinking fountains or ice machines on a specific floor or in a specific room)>>. According to the manufacturer, <<INSERT NAME>>, the filters should be inspected every <<INSERT TIME (e.g. every month)>> and replaced at least every <<INSERT TIME (e.g. every three months)>>, or sooner where necessary. Thus, a member of the facilities operations

team will inspect the filters each month and replace when needed. Records of maintenance are to be logged on <<INSERT COMPANY PLATFORM>> and uploaded to our WELL account each year on <<INSERT DATE, (e.g. January 5th.) These records are kept for a minimum of three years.

Date	Location	Product	Actions Taken	Action Frequency	Designee
1/5/2017	Drinking fountains - Open office	Sediment Filter XX	Inspection. No replacements currently needed.	Monthly.	John Smith
	Drinking fountains - Reception	Sediment Filter XX	Inspection. No replacements currently needed	Monthly.	
	Sink – Café	Sediment Filter XX	Inspection. No replacements currently needed	Monthly.	
	Supply lines – Café	Sediment Filter XX	Inspection. No replacements currently needed	Monthly.	
2/5/2017	Drinking fountains - Open office	Sediment Filter XX	Filters replaced.	Monthly.	John Smith
	Drinking fountains - Reception	Sediment Filter XX	Filters replaced.	Monthly.	
	Sink – Café	Sediment Filter XX	Filters replaced	Monthly.	
	Supply lines – Café	Sediment Filter XX	Filters replaced	Monthly.	
3/5/2017	Drinking fountains - Open office	Sediment Filter XX	Inspection. No replacements currently needed	Monthly.	John Smith
	Drinking fountains - Reception	Sediment Filter XX	Inspection. No replacements currently needed	Monthly.	
	Sink – Café	Sediment Filter XX	Inspection. No replacements currently needed	Monthly.	
	Supply lines – Café	Sediment Filter XX	Inspection. No replacements currently needed	Monthly.	
4/5/2017					
5/5/2017					
6/5/2017					

7/5/2017					
8/5/2017					
9/5/2017					
10/5/2017					
11/5/2017					
12/5/2017					
1/5/2018				2017 maintenance logs must be uploaded to WELL account.	

Microbial Elimination

Addressed in WELL Building Standard Feature 36, Part 3

To eliminate microbes from water intended for human consumption, the building is equipped with <<SELECT EITHER UVGI WATER SANITIZATION OR FILTER RATED BY THE NSF TO REMOVE MICROBIAL CYSTS>> in the <<INSERT LOCATION (e.g. the sinks, drinking fountains or ice machines on a specific floor or in a specific room)>>. According to the manufacturer, <<INSERT NAME>>, the filters and/or sanitizers should be inspected every <<INSERT TIME (e.g. every month)>> and replaced at least every <<INSERT TIME (e.g. every three months)>>, or sooner where necessary. Thus, a member of the facilities operations team will inspect the filters and/or sanitizers each month and replace when needed. Records of maintenance are to be logged on <<INSERT COMPANY PLATFORM>> and uploaded to our WELL account each year on <<INSERT DATE, (e.g. January 5th).>> These records are kept for a minimum of three years.

Date	Location	Product	Actions Taken	Action Frequency	Designee
1/5/2017	Drinking fountains - Open office	XX	Inspection. No replacements currently needed.	Monthly.	John Smith
	Drinking fountains - Reception	XX	Inspection. No replacements currently needed	Monthly.	
	Sink – Café	XX	Inspection. No replacements currently needed	Monthly.	
	Supply lines – Café	XX	Inspection. No replacements currently needed	Monthly.	
2/5/2017	Drinking fountains - Open office	XX	Filters replaced.	Monthly.	John Smith

	Drinking fountains - Reception	XX	Filters replaced.	Monthly.	
	Sink – Café	XX	Filters replaced	Monthly.	
	Supply lines – Café	XX	Filters replaced	Monthly.	
3/5/2017	Drinking fountains - Open office	XX	Inspection. No replacements currently needed	Monthly.	John Smith
	Drinking fountains - Reception	XX	Inspection. No replacements currently needed	Monthly.	
	Sink – Café	XX	Inspection. No replacements currently needed	Monthly.	
	Supply lines – Café	XX	Inspection. No replacements currently needed	Monthly.	
4/5/2017					
5/5/2017					
6/5/2017					
7/5/2017					
8/5/2017					
9/5/2017					
10/5/2017					
11/5/2017					
12/5/2017					
1/5/2018				2017 maintenance logs must be uploaded to WELL account.	

FEATURE 86: POST-OCCUPANCY SURVEYS

PART 2: INFORMATIONAL REPORTING

Aggregate results from surveys are reported within 30 days to the following groups:

- a. Building owners and managers.
- b. Building occupants (upon request).
- c. The International WELL Building Institute.

DATA SUBMISSION TEMPLATE

In accordance with WELL Feature 86, our facilities operations team conducts occupant surveys to measure satisfaction with the interior environment. The surveys are administered <<INSERT FREQUENCY>> (e.g. annually or bi-annually) to <<INSERT NUMBER>> occupants. Thus, this sample represents <<INSERT PERCENTAGE>> of building occupants. The survey is derived from <<INSERT SURVEY NAME>> (e.g. Occupant Indoor Environmental Quality (IEQ) Survey™ from the Center for the Built Environment at UC Berkeley) and covers the following topics:

- a. Acoustics.
- b. Thermal comfort, including humidity and air flow (administered once during the cooling season and once during the heating season).
- c. Furnishings.
- d. Workspace light levels and quality.
- e. Odors, stuffiness and other air quality concerns.
- f. Cleanliness and maintenance.
- g. Layout.

Survey results from <<INSERT DATE>> are found below. The results were uploaded to the project's WELL account within 30 days, on <<INSERT DATE>>.

NOTE: This template provides one acceptable format as an example of what this data MIGHT look like. Your project does NOT need to fill out this sheet. If your project collects and tracks data in a different manner, simply submit that data as annual documentation.

Background Information:

1. **EXAMPLE:** How long have you been working at the organization?
 - a. Less than 1 year (% answered a)
 - b. 1-2 years (% answered b)
 - c. 3-7 years (%answered c)
 - d. 7+ years (%answered d)
2. _____?
 - a. ... (% answered a)
 - b. ... (% answered b)
 - c. ... (%answered c)
 - d. ... (%answered d)
3. _____?

- | | |
|--------|----------------|
| a. ... | (% answered a) |
| b. ... | (% answered b) |
| c. ... | (%answered c) |
| d. ... | (%answered d) |
4. _____ ?
- | | |
|--------|----------------|
| a. ... | (% answered a) |
| b. ... | (% answered b) |
| c. ... | (%answered c) |
| d. ... | (%answered d) |

Acoustics:

1. **EXAMPLE:** *How satisfied are you with the acoustic privacy in your workspace?*
- | | |
|-----------------------------------|----------------|
| a. <i>Extremely satisfied</i> | (% answered a) |
| b. <i>Moderately satisfied</i> | (% answered b) |
| c. <i>Moderately dissatisfied</i> | (%answered c) |
| d. <i>Extremely dissatisfied</i> | (%answered d) |
2. _____ ?
- | | |
|--------|----------------|
| a. ... | (% answered a) |
| b. ... | (% answered b) |
| c. ... | (%answered c) |
| d. ... | (%answered d) |
3. _____ ?
- | | |
|--------|----------------|
| a. ... | (% answered a) |
| b. ... | (% answered b) |
| c. ... | (%answered c) |
| d. ... | (%answered d) |
4. _____ ?
- | | |
|--------|----------------|
| a. ... | (% answered a) |
| b. ... | (% answered b) |
| c. ... | (%answered c) |
| d. ... | (%answered d) |

Thermal comfort (administered at least twice a year):

Next survey will be conducted <<INSERT DATE>>

1. **EXAMPLE:** *Does your thermal comfort in your office environment enhance or interfere with your ability to be productive at work?*
- | | |
|----------------------|----------------|
| a. <i>Enhances</i> | (% answered a) |
| b. <i>Neutral</i> | (% answered b) |
| c. <i>Interferes</i> | (%answered c) |
2. _____ ?
- | | |
|--------|----------------|
| a. ... | (% answered a) |
| b. ... | (% answered b) |
| c. ... | (%answered c) |

- | | | | |
|----|--------|----------------|---|
| 3. | d. ... | (%answered d) | ? |
| | a. ... | (% answered a) | |
| | b. ... | (% answered b) | |
| | c. ... | (%answered c) | |
| | d. ... | (%answered d) | |
| 4. | | | ? |
| | a. ... | (% answered a) | |
| | b. ... | (% answered b) | |
| | c. ... | (%answered c) | |
| | d. ... | (%answered d) | |

Furnishings:

1. **EXAMPLE:** *How satisfied are you with the ability to adjust your furniture to meet your needs?*

a. <i>Extremely satisfied</i>	(% answered a)
b. <i>Moderately satisfied</i>	(% answered b)
c. <i>Moderately dissatisfied</i>	(%answered c)
d. <i>Extremely dissatisfied</i>	(%answered d)
2. _____ ?

a. ...	(% answered a)
b. ...	(% answered b)
c. ...	(%answered c)
d. ...	(%answered d)
3. _____ ?

a. ...	(% answered a)
b. ...	(% answered b)
c. ...	(%answered c)
d. ...	(%answered d)
4. _____ ?

a. ...	(% answered a)
b. ...	(% answered b)
c. ...	(%answered c)
d. ...	(%answered d)

Workspace light levels and quality:

1. **EXAMPLE:** *How satisfied are you with the visual comfort (glare, daylight access, etc) within your workspace?...*

a. <i>Extremely satisfied</i>	(% answered a)
b. <i>Moderately satisfied</i>	(% answered b)
c. <i>Moderately dissatisfied</i>	(%answered c)
d. <i>Extremely dissatisfied</i>	(%answered d)
2. _____ ?

a. ...	(% answered a)
b. ...	(% answered b)
c. ...	(%answered c)

3.	d. ...	(%answered d)	?
	a. ...	(% answered a)	
	b. ...	(% answered b)	
	c. ...	(%answered c)	
	d. ...	(%answered d)	
4.			?
	a. ...	(% answered a)	
	b. ...	(% answered b)	
	c. ...	(%answered c)	
	d. ...	(%answered d)	

Odors, stuffiness and other air quality concerns:

1.	EXAMPLE: Do odors within the workplace ever detract from your productivity?		
	a. Yes	(% answered a)	
	b. No	(% answered b)	
	c. Sometimes	(%answered c)	
2.			?
	a. ...	(% answered a)	
	b. ...	(% answered b)	
	c. ...	(%answered c)	
	d. ...	(%answered d)	
3.			?
	a. ...	(% answered a)	
	b. ...	(% answered b)	
	c. ...	(%answered c)	
	d. ...	(%answered d)	
4.			?
	a. ...	(% answered a)	
	b. ...	(% answered b)	
	c. ...	(%answered c)	
	d. ...	(%answered d)	

Cleanliness and maintenance:

1.	EXAMPLE: How satisfied are you with the general cleanliness of the office?		
	a. Extremely satisfied	(% answered a)	
	b. Moderately satisfied	(% answered b)	
	c. Moderately dissatisfied	(%answered c)	
	d. Extremely dissatisfied	(%answered d)	
2.			?
	a. ...	(% answered a)	
	b. ...	(% answered b)	
	c. ...	(%answered c)	
	d. ...	(%answered d)	

3. _____ ?
- a. ... (% answered a)
 - b. ... (% answered b)
 - c. ... (%answered c)
 - d. ... (%answered d)
4. _____ ?
- a. ... (% answered a)
 - b. ... (% answered b)
 - c. ... (%answered c)
 - d. ... (%answered d)

Layout:

1. **EXAMPLE:** *Does the layout of the office enhance collaboration with coworkers?*
- a. *Yes* (% answered a)
 - b. *No* (% answered b)
 - c. *Sometimes* (%answered c)
2. _____ ?
- a. ... (% answered a)
 - b. ... (% answered b)
 - c. ... (%answered c)
 - d. ... (%answered d)
3. _____ ?
- a. ... (% answered a)
 - b. ... (% answered b)
 - c. ... (%answered c)
 - d. ... (%answered d)
4. _____ ?
- a. ... (% answered a)
 - b. ... (% answered b)
 - c. ... (%answered c)
 - d. ... (%answered d)