

# SA2 - Assess and Maintain Air Treatment Systems

## Professional Narrative

WELL Health-Safety Rating™ Q2 2025

---

### WHAT IS THIS DOCUMENT:






This document is intended to serve as a guide on how to create a project **narrative** and **ongoing maintenance report** to **mitigate risks from indoor contamination and pollution sources such as infectious disease particles and volatile organic compounds (VOCs)**.



This document is meant to demonstrate an acceptable degree of detail for a documentation submission. The Feature cannot be demonstrated solely through a confirmation that the requirements have been or will be implemented. The level of detail is up to the discretion of the project team, but the documents must include specific details demonstrating that the actual policies/protocols have been enacted in the project boundary.

This document and similar tools are intended to assist projects in their pursuit of the WELL Health-Safety Rating but use of this document and/or similar tools are in no way a guarantee of achievement of any rating, certification or other designation, and no representation or warranty is made regarding the likelihood of achieving any rating or designation, and IWBI shall have no liability resulting from the use or content of this document or similar tools or resources or from any action taken or inaction occurring in reliance on this document or similar tools or resources.

Note: The below document is based on the Q2 2025 addenda of the WELL Health-Safety Rating™. Project teams are required to implement the feature requirements from the addenda version assigned to their project or any more recent addenda version.

### HOW TO USE THIS DOCUMENT:

- ☐  Read the [below feature requirements](#) (or the feature requirements from the [addenda version assigned to your project](#), as relevant) and determine how your project addresses each requirement.
  - a. If your project is a WELL Core project, read through and ensure that your project follows the “WELL Core Guidance.”
  - b. Make sure to apply the feature requirements appropriate to your project’s space types. For example, if your project has both dwelling units and other space types, ensure your project is applying the requirements under “For Dwelling Units” to the dwelling unit spaces and applying the requirements under “For All Spaces except Dwelling Units” to the other space types. Check out the [WELL Health-Safety Rating™ digital standard](#) for the exact language on your project’s space types.
- ☐  Refer to the [below example document](#) to get an idea of how to set up your documentation.
- ☐  Collaborate with your stakeholders to gather the [relevant documentation](#) that demonstrates the project’s compliance with the feature. Some examples of relevant documentation include:
  - a. a letter from a hired professional outlining services provided
  - b. the project’s floor plans
  - c. a modeling report
- ☐  Create a technical document using existing documentation where relevant, annotating it to clarify where feature requirements are met. Some examples of annotating include:
  - a. highlight the sections relevant to WELL requirements
  - b. circle or add boxes around particular data
  - c. add notes to confirm WELL requirements
  - d. add labels to draw attention to particular sections
  - e. provide an explanation of the connection to WELL requirements using a different colored font
  - f. check out the [WELL Documentation Annotation Guide](#) for more
- ☐  Name the document so that it is easily identifiable. Some examples for naming include:
  - a. name the document using the WELL feature code
  - b. name the document using the WELL feature name
  - c. name the document using the WELL document type

- ☐  Review the document you've created and ensure that all the necessary WELL requirements are fully and clearly addressed.
  - a. Note: the level of detail is up to the discretion of the project team, but the document must include specific details demonstrating that the actual requirements have been enacted in the project boundary. Features cannot be demonstrated solely through a written confirmation that the WELL requirements have been or will be implemented.
- ☐  Upload the document to the scorecard in the WELL digital platform, after you've confirmed that the document fully and clearly addresses all the necessary WELL requirements.

## **Feature Part Requirements**

### **For All Spaces**

#### **1. System Inventory**

*Project provides an inventory of all filters and UVGI equipment currently used to treat the air in the following locations (if any):*

- a. *Ducts and air handling units.*
- b. *Fan coil units.*
- c. *Standalone air cleaning devices.*

**AND**

#### **2. Air Treatment Assessment**

*The following requirements are met:*

- a. *A qualified engineer provides the project with an assessment of at least one of the following for occupiable areas.*
  - 1. *The highest efficiency of media or other particle filters (particularly for recirculated air, if any) that can be installed with the current mechanical system.*
  - 2. *The capacity of the current mechanical system to utilize UVGI equipment.*
  - 3. *The quantity of standalone air purifiers required to serve the space.*

*b. Project provides one of the following:*

- 1. *Conditions under which project will install at least one of the types of treatment systems assessed.*
- 2. *A timeline for the installation of at least one of the types of treatment systems assessed..*

**AND**

#### **3. Device Maintenance**

*For devices identified in the System Inventory, the following requirement is met:*

- 1. *Evidence that the filters and/or UV lamps have been replaced according to the manufacturer's recommendation is submitted annually through the WELL digital platform.*



The below sample documentation is intended to provide guidance for assessing and maintaining air treatment systems. It is not a template. You may note included components that are not required to demonstrate compliance with this Feature.

## EXAMPLE DOCUMENT

### Example for Section- System Inventory

The following table includes a comprehensive list of all filters and UVGI equipment used in ducts, air handling units, fan coil units and standalone air cleaning devices in this project.

System Inventory						
System Type	Quantity	Filter Type / UVGI	System Location	Manufacturer	Model	Notes
[Ex: Standalone unit]	Ex: 2	Ex: HEPA filter	Ex: Lobby and breakroom	Ex: Coway	Ex: AP-1512 HH	Ex: Installed 1/3/20, 3yr warranty, clean pre-filters every 2-4 wks, replace pre-filter every 6 mo., replace HEPA filter every 1 yr
[Ex: Air Handling Unit]	Ex: 8	Ex: MERV13	Ex: Floors 1-5	Ex: Daikin	Ex: FBQ30PVJU	Ex: Installed 3/24/17, 10 yr warranty, change MERV13 filters every 3 mo.
[Ex: Fan Coil Unit]						
[Ex: Ducts]						

## EXAMPLE DOCUMENT

### Example for Section- Air Treatment Assessment

[Name of engineer with their qualifications] at [engineering firm] has assessed mechanical ventilation systems at [project] on [date of evaluation] and evaluated them for highest possible level of filtration media and capacity to include UVGI systems. See analysis below:

- Offices on floors 1-5:** Offices on floors 1-5 are served by [describe model] mechanical units that currently have MERV 8 filtration installed on outdoor air and recirculated air systems. The units have the capacity for MERV 13 filtration on the recirculated air. They can also be retrofitted with UVGI systems. [Engineering firm] recommends [UVGI system model].
- Offices on floors 6-8:** Offices on floors 6-8 are served by [describe model] mechanical units that currently have MERV 8 filtration installed on outdoor air and recirculated air systems. The units do not have the capacity to upgrade filtration. These systems can be retrofitted with UVGI systems. Given space constraints around mechanical systems and ductwork, [engineering firm] recommends [UVGI system model]. Another possibility is to upgrade the aging mechanical systems to more efficient modern models such as [insert model] that have the capacity for MERV13 filtration and UVGI.
- Lobby:** The lobby is served by [describe model] mechanical units that currently have MERV 13 and carbon filtration. This is the highest capacity of filtration for these units. The units cannot be retrofitted with UVGI systems.
- Remaining core spaces:** The remainder of the building is served by [describe model] mechanical units that currently have MERV 8 filtration. They have the capacity for MERV 13 filtration and can be retrofitted with UVGI systems. [Engineering firm] recommends [UVGI system model].

[Consider including anticipated upfront and maintenance costs associated with the filter upgrades.]

The costs associated with the recommendations above exceed the current annual budget. The operations team has decided to take a phased approach to implementing the recommendations. All recommendations have been added to the capital improvements plan for the next two years because of [reasons for implementing measures, e.g. global pandemic].

Phased Implementation Plan
Next 30 days
<ul style="list-style-type: none"> <li>Upgrade filtration on systems in offices on floors 1-5 to MERV13.</li> <li>Upgrade filtration on systems in core spaces to MERV13.</li> <li>Create plan to install UVGI in office systems on floors 1-5.</li> <li>Install temporary standalone UVGI / HEPA filters on floors 6-8 and core spaces.</li> </ul>
Next 60 days
<ul style="list-style-type: none"> <li>Install UVGI systems on floors 1-5.</li> <li>Create plan to install UVGI in core areas.</li> </ul>
Next 6 months
<ul style="list-style-type: none"> <li>Install UVGI systems in core areas and remove standalone filtration systems (consider donating).</li> </ul>
Next year
<ul style="list-style-type: none"> <li>Replace mechanical units on floors 6-8 with 100% outdoor air units that use MERV13 filtration and are compatible with UVGI. Remove the standalone units (consider donating).</li> </ul>

## EXAMPLE DOCUMENT

### Example for Section- Device Maintenance

The following table includes the information for air treatment system on-going maintenance reports. While on-going maintenance report is not required at initial documentation submission, it is best practice to create it at the beginning of the project to ensure future completion.

AIR TREATMENT SYSTEM ANNUAL MAINTENANCE REPORT AT [PROJECT]								
Manufacturer and Model	Quantity	Location	Manufacturer Recommended Maintenance	Maintenance Completed	Date(s) of Maintenance	Completed by (Initials)	Date Logged in WELL Online	Notes
Ex: Coway AP-1512 HH	Ex: 2	Ex: Lobby and breakroom	Ex: clean pre-filters every 2-4 wks, replace pre-filter every 6 mo., replace HEPA filter every 1 yr	Cleaned pre-filters Changed pre-filters Changed HEPA filters	Biweekly 2/15/19 and 8/15/19 8/15/19	HW HW HW	8/15/19	Warranty ends 8/15/21, consider replacing units
Ex: Daikin FBQ30PVJU	Ex: 2	Ex: Mechanical room on floor 3	Ex: change filters quarterly, system checks twice a year	Changed filters Changed filters and completed system checks	2/15/19 8/15/19	HW HW	8/15/19	Warranty ends 3/24/27

### TIPS FOR MULTIPLE LOCATIONS – Professional Narrative

- Organizations participating in WELL at Scale should indicate which locations are pursuing this feature, and then submit the specific details for the locations selected for an audit.

## **TIPS FOR MULTIPLE LOCATIONS – On-going Maintenance Report**

- For organizations participating in WELL at Scale, ongoing data reports must be submitted for each project pursuing this feature part; they are not considered shareable.