

STATE OF WISCONSIN
CLASSIFICATION SPECIFICATION

HEATING, VENTILATING, AIR CONDITIONING (HVAC)/
REFRIGERATION SPECIALIST
CLASSIFICATION SERIES

I. INTRODUCTION

A. Purpose of This Classification Specification

This classification specification is the basic authority under ER 2.04, Wis. Adm. Code, for making classification decisions relative to present and future Heating, Ventilating, Air Conditioning (HVAC)/Refrigeration Specialist positions located within state government. This classification specification will not specifically identify every eventuality or combination of duties and responsibilities of positions that currently exist, or those that result from changing program emphasis in the future. Rather, it is designed to serve as a framework for classification decision-making in this occupational area.

Classification decisions must be based on the “best fit” of the duties within the existing classification structure. The “best fit” is determined by the majority (i.e., more than 50%) of the work assigned to and performed by the position when compared to the class concepts and definition of this specification or through other methods of position analysis. Position analysis defines the nature and character of the work through the use of any or all of the following: definition statements; listing of areas of specialization; representative examples of work performed; allocation patterns of representative positions; job evaluation guide charts, standards or factors; statements of inclusion and exclusion; licensure or certification requirements; and other such information necessary to facilitate the assignment of positions to the appropriate classification.

B. Inclusions

This classification series encompasses positions which, for a majority of the time, perform the full range of duties from routine adjustment, maintenance and repair of HVAC/Refrigeration systems to system experts in the HVAC and/or refrigeration area. These positions must spend the majority of time performing work on HVAC and/or refrigeration equipment and systems.

C. Exclusions

Excluded from this classification series are the following types of positions:

1. Positions that meet the definition of confidential, professional or supervisor as defined in s. 111.81 (7) and (13) and (19) as administered and interpreted by the Wisconsin Employment Relations Commission.
2. Positions that perform skilled trades work for a majority of the time and require Journeyman status and are more appropriately classified as Steamfitters, Electricians, Plumbers, etc.

3. Positions whose duties may include HVAC and/or refrigeration repair and maintenance, but perform other mechanical maintenance a majority of time and are more appropriately classified as Facilities Maintenance Specialists.
4. Positions whose work is responsible for specific aspects of a larger architecture/engineering management program for a majority of the time and are more appropriately classified as Engineering Specialist.
5. Positions that machine parts and instruments for a majority of the time and are more appropriately classified as Equipment Fabricator, Mechanician and Instrument Maker.
6. Positions whose work is primarily responsible for power plant maintenance and repair for a majority of the time and are more appropriately classified as Power Plant Operator.
7. All other positions that are more appropriately identified by other classification specifications.

D. Entrance Into and Movement Through This Classification Series

Employees enter this classification series by competitive examination. All levels within this series are considered to be objective levels. Reclassification to the advanced level will be permitted only when it can be demonstrated that the change in duties and responsibilities justifying the class change are a logical and gradual outgrowth of the original position's previous duties and responsibilities.

II. DEFINITIONS

HEATING, VENTILATING, AIR CONDITIONING (HVAC)/REFRIGERATION SPECIALIST

This is general level HVAC/Refrigeration maintenance and repair work. These positions inspect, maintain, repair, perform preventive maintenance, and perform minor installations on HVAC/Refrigeration equipment. This may include performing technical maintenance a portion of the time and operating all computerized building systems to help identify mechanical malfunctions. Work is performed under the general direction of an advanced level HVAC/Refrigeration Specialist, Building/Grounds Supervisor, Building/Grounds Superintendent, etc.

Positions are assigned any combination of the following duties:

- Perform routine preventive maintenance and assist in making minor repairs to HVAC systems and their associated controls (e.g., thermostats).
- Monitor controls for heating and ventilating equipment.
- Clean or replace filters for heating and ventilating equipment.
- Repair and adjust controls for heating and ventilating equipment.
- Repair and service various refrigeration and air conditioning units.
- Set up and maintain a preventive maintenance schedule on equipment and boilers.
- Inspect, repair and maintain commercial HVAC equipment including boilers, chillers and their control units.
- Maintain and repair refrigeration and fuel storage units, including pumps and valves.
- Install and repair air conditioners and climate control devices.
- Monitor computerized environmental control center making adjustments as needed and/or dispatching other HVAC/Refrigeration specialists, building trades or other professionals as required.

HEATING, VENTILATING, AIR CONDITIONING (HVAC)/REFRIGERATION SPECIALIST - ADVANCED

This is advanced level HVAC and/or refrigeration work performed under general supervision. Employees in this class troubleshoot, repair, adjust, modify and remodel sophisticated HVAC and/or refrigeration control systems (pneumatic, electric and electronic) and related mechanical and electronic equipment. These positions are responsible for the most specialized and technically advanced environmental controls and typically direct HVAC/Refrigeration Specialist and Facilities Maintenance Specialists in the more routine maintenance and repair of the systems or perform this work incidental to their primary function as the systems expert. These controls are used to balance elements such as outside versus inside temperature, humidity and air velocity, taking into consideration factors such as time of day usage, system capabilities and energy efficiency. In addition, these employees may be responsible for the design, development, operation and ongoing maintenance of a computerized energy management system used to monitor and control heating and air conditioning systems and report and make recommendations on energy conservation procedures, controls and activities. These positions may be required to maintain the refrigeration reclaim certification and keep refrigerant use records to comply with Environmental Protection Agency (EPA) requirements.

Positions at this level may perform the duties of the HVAC/Refrigeration Specialist, and perform any combination of the following duties a majority of the time:

- Review computer output and individual complaints to locate, identify and troubleshoot controls, equipment, and system malfunctions.
- Disassemble and inspect malfunctioning controls or equipment to determine source of problem and decide on appropriate action to correct the problem.
- Layout new and remodel old control systems.
- Redesign existing controls and equipment for maximum efficiency.
- Balance air and water flow distribution to optimize system performance.
- Read printouts and interpret the information provided to make changes to the computer programs which control the operation of fans, chillers, pumps, dampers, and controls.
- Assist in the determination to incorporate existing systems with new equipment.
- Determine energy management savings and conservation.
- Find and repair leaks in gas refrigerant units.
- Maintain and repair pneumatic and electronic control systems.
- Perform HVAC and/or refrigeration systems analysis to recognize systems malfunctions, interpret complex schematic diagrams and make appropriate repairs or adjustments to complete system.
- Review plans and specification for new and remodeling projects and recommend changes and/or modifications.
- Start and stop chillers as required to meet seasonal cooling requirements.

III. QUALIFICATIONS

The qualifications required for these positions will be determined at the time of recruitment. Such determinations will be made based on an analysis of the goals and worker activities performed and by an identification of the education, training, work, or other life experience which would provide reasonable assurance that the knowledge and skills required upon appointment have been acquired. Department of Commerce refrigerant certificate and EPA Universal Technician certification for refrigerant may be required.

IV. ADMINISTRATIVE INFORMATION

This classification series was created effective June 25, 2006 and announced in Bulletin OSER-0107-MRS/SC due to the abolishment of the Heating, Ventilating, Air Conditioning (HVAC)/Refrigeration Specialist as a result of the Facilities Repair and Maintenance Survey. This classification series modification captures all positions that are performing HVAC work.

TFB/SAM
77261