

2022

AHRI Standards Style Guide

Approved by the AHRI Standards Committee, February 2022



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This AHRI Standards Committee Style Guide document is owned and maintained by the AHRI Standards Committee, a standing committee of the AHRI Board of Directors, and defines the policies and procedures related to development and approval of AHRI standards and guidelines.

Copies of this document shall be provided freely to interested parties.

Figures and examples in this document, unless otherwise noted, are informative.

Note:

This style guide supersedes *Appendix A* of the *2018 Standards Policy Committee Policy and Procedure*.

Intent

This style guide is intended for the guidance of the AHRI committees and staff in the development of standards and guidelines.

Review and Amendment

This style guide is subject to review and amendment.

2022 Edition

This edition of AHRI Standards Style Guide was prepared by the Ad Hoc Standards Style Guide Committee. It was approved by the Standards Committee on 18 February 2022.

Origin and Development of the AHRI Standards Style Guide

In 2021 the Standards Committee approved the *AHRI Policy & Procedures for the Development of Standards*. This separates the style guide from the policy and procedure document and requires style updates to align with the new version.

Summary of Changes

The AHRI Standards Style Guide contains the following changes, additions, and updates to *Appendix A* of the 2018 *Standards Policy Committee Policy and Procedure*:

- Provides objectives of standards and style guide.
- Provides definitions of document conditions and elements.
- Provides clarification on required, conditional, and optional structural elements.
- Improves standard and guideline documentation of history and transparency with new Front Matter information requirements.
- Updates document structure in Purpose, Scope, and Definitions sections.
- Aligns editorial style with *Chicago Manual of Style 18th Edition* including lists, capitalization, unit spacing rules, punctuation, fractions, citations in reference lists, and citing websites and webpages.
- Defines and provides guidance for use of expressions of provisions that aligns with ISO/IEC.
- Provides guidance for vague words and phrases that aligns with ASHRAE rules.
- Updates rules for formatting tables to improve consistency across standards.
- Clarifies formatting rules for addenda and errata.
- Provides new formatting rules for interpretations and withdrawn documents.
- Provides rules for copyright and permissions.
- Updates rules for units of measure in standards and guidelines.

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These lists represent the membership of the Standards Style Guide Committee at the time the Standards Committee approved final text of this edition. Since that time, changes in the membership may have occurred. Membership on these committees shall not in and of itself constitute an endorsement by the committee members', employers of AHRI, or any document developed by the committee on which the member serves.

Note: The AHRI Standards Style Guide was developed internally. The Ad Hoc Standards Style Guide Committee developed the 2022 Standards Style Guide but did not vote to approve the document.

AHRI Ad Hoc Standards Style Guide Committee Scope: The scope of the AHRI ad hoc standards style guide committee was to update the existing format and content requirements for AHRI standards and guidelines (*Appendix A of the 2018 Standards Policy and Procedure*) into a Standards Style Guide.

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AHRI STANDARDS STYLE GUIDE

Section 1. Objectives of AHRI Standards Style Guide and Principles for Development of Standards and Guidelines

1.1 *Objective of the AHRI Standards Style Guide*

The AHRI Standards Style Guide is a manual that provides formatting rules, defines the elements of documents, defines normative and informative language, provides rules for normative and informative sections of documents, specifies editorial style, and is an example of formatting elements of a document.

The objectives of the AHRI Standards Style Guide include:

- to provide an all-purpose guide as a resource for AHRI staff and committees for the development of AHRI standards and guidelines
- to provide answers to writing, style, and formatting questions
- to maintain consistency and quality of AHRI standards and guidelines

1.1.1 *How the Guide is Arranged*

The Standards Style Guide is divided into eight sections:

- Objectives of AHRI Standards Style Guide and Principles for Development of Standards and Guidelines
- Definitions
- Document Structure
- Editorial Style
- Document Elements
- Copyright and Permissions
- Units of Measure in AHRI Standards and Guidelines
- Interpretations Format and Numbering

1.2 *Objective of Standards*

This AHRI Standards Style Guide defines the rules for structure, format, and content of AHRI standards and guidelines. Standards and guidelines are defined in the AHRI Standards Policy & Process document, latest edition.

The objective of AHRI standards and guidelines is to specify clear and unambiguous provisions to promote international trade and communication. To achieve this objective, standards and guidelines documents shall:

- Be complete within the limits specified by their scope. When a standard or guideline provides requirements or recommendations, these are either written explicitly, or made by reference to other documents.
- Be internally consistent within each document.
- Be clear and accurate to prevent misinterpretation or misunderstanding to a person having competence in the field.
- Be comprehensible to qualified people who have not participated in their preparation.
- Be concise, not using more words than necessary to convey the idea.
- Be written using existing knowledge about the state of the art and reflect current accepted or best practices.
- Take into account the current market conditions; acknowledging the tradeoffs between what is technically feasible and what the market demands. Provide a framework for future technological development.
- Conform to the *AHRI Standards Policy & Procedures* and this *AHRI Standards Style Guide*.

AHRI standards and guidelines are voluntary; a standard does not by itself impose any obligation upon anyone to follow it. However, an obligation can be imposed, for example, by adoption of the standard into regulation or legislation or by a contract that refers to the standard. An AHRI standard or guideline shall not include contractual requirements (for example, concerning claims, guarantees, covering of expenses) and legal or statutory requirements.

1.3 *Development and Approval*

The procedure for development and approval of standards and guidelines is given in the *AHRI Standards Policy & Procedures*. The procedure given in the *AHRI Standards Policy & Procedures* shall be applied throughout all stages of drafting.

1.4 *Performance Principle*

Not all characteristics of an item or a subject can be, or need be, standardized. The choice of characteristics to be standardized depends on the purpose of the document, for example, product standard, application standard, or guideline. A functional analysis of the product can help to identify the characteristics to be included in the document.

Requirements shall be expressed in terms of performance rather than design or descriptive characteristics. This principle allows maximum freedom for technical development and reduces the risk of unfavorable market impacts (for example, limiting development of innovative solutions).

When the performance principle is adopted, it shall be confirmed that important features are not inadvertently omitted from the performance requirements.

Requirements concerning the manufacturing process shall be omitted in favor of tests to be made on the final product.

The choice between specifying by description or by performance is important because specification by performance can lead to complicated, costly, and lengthy testing procedures.

1.5 *Verifiability*

Requirements shall be objectively verifiable. Only those requirements that can be verified shall be included.

Subjective phrases such as “sufficiently strong” or “of adequate strength” shall not be used.

The stability, reliability or lifetime of a product shall not be specified if there is not a test method known that can verify the claim in a specified time. A guarantee by the manufacturer is not a substitute for such requirements. Guaranteed conditions shall not be included because these are commercial or contractual, rather than technical, in nature.

1.6 *Consistency*

Consistency should be maintained within each document, and within a series of associated documents.

- The structure of associated documents and the numbering of their clauses should be identical.
- Identical wording should be used to express identical provisions.
- The same terminology should be used throughout. Synonyms should not be used.

Consistency is particularly important to help the user understand documents or series of associated documents, and when using automated text processing techniques and computer-aided translation.

1.7 *Prevention of Duplication and Unnecessary Deviations*

Standards and guideline documents should abstain from duplication with other AHRI standards and guidelines, or those from other organizations. This is particularly important in test methods, that are often applicable to more than one product, or type of product.

Before developing a standard on any item or subject, the developing committee shall determine whether an applicable standard already exists at AHRI or elsewhere. If it is necessary to invoke a requirement that appears elsewhere, this should be done by reference, not by repetition.

If a test method is, or can be, applicable to two or more types of products, a document shall be prepared on the method itself, and each document dealing with a given product shall refer to it (indicating any modifications that can be necessary). This will help to prevent unnecessary deviations.

The requirements for one item or subject should be confined to one document.

The document should be written in a manner specifying generic requirements applicable to a group of items or subjects.

If the committee determines repetition of a requirement from an exterior source to be necessary, the source shall be referenced precisely (see Section 5.8).

1.8 *Accommodation of More Than One Product Size*

When developing the scope, test requirements, and rating requirements, attention shall be given to all product sizes, variations, and configurations as technically feasible for the given product. Attention shall be given to the global market for the product and the expertise of the STC.

1.9 *Characteristics Not Specified in a Document*

A standard or guideline may list characteristics that can be chosen freely by the supplier. The characteristics chosen shall be stated, for example, on a nameplate, label or accompanying document.

For complex items, it is impractical to specify exhaustive performance requirements. Instead, it is preferable to require that the item be supplied with a list of performance data.

Documents listing characteristics for which suppliers or purchasers are required to state values or other data not specified by the document shall specify how such values are to be measured and stated.

1.10 *Translatability*

AHRI standards and guides will be translated and published in a local language. There is a requirement to translate into French those standards intended for Canadian (SCC) approval. AHRI promotes the adoption of AHRI standards in other countries and regions, so other standards may need to be translated into other languages as well. Even for standards that will not be translated the document should be written in manner that allows for translation as these same guidelines will help make standards more readable, especially for those readers whose native language may not be American English.

Committees developing standards can make the document more translatable by

- Not using colloquialisms or slang
- Using correct English
- Using terminology consistently, such as. always using a word or product name in the same manner, and not using synonyms for second uses.
- Using words for requirements and recommendations (for example, shall/must and should/may) correctly and consistently
- Use concise and clear language and terminology
- Not using terms that are country, region, or hemisphere specific, or words or examples that are culture-specific
- Not using subjective and unclear terms and phrases such as those found in the prohibited words list in Table 6.

Section 2. Definitions

2.1 *Conditions of a Document*

2.1.1 *Capability*

An expression, in the content of a document, that conveys the ability, fitness, or quality necessary to do or achieve a specified thing.

2.1.2 *External Constraint*

A constraint or obligation on the user of the document (for example, laws of nature or conditions existing in different countries or regions) that is not stated as a provision of the document.

2.1.3 *Permission*

An expression, in the content of a document, that conveys consent or liberty (or opportunity) to do something.

2.1.4 *Profile*

A named combination of options, chosen according to a specified framework, that are necessary to accomplish a particular function.

2.1.5 *Provision*

An expression in the content of a normative document that takes the form of a statement an instruction, a recommendation, or a requirement.

2.1.6 *Recommendation*

An expression in the content of a document that conveys a suggested possible choice or course of action deemed to be advantageous without necessarily mentioning or excluding others.

2.1.7 *Requirement*

An expression, in the content of a document, that conveys objectively verifiable criteria to be fulfilled and where deviation is not permitted if conformance with the document is to be claimed.

2.1.8 *State of the Art*

A developed stage of technical capability at a given time as regards products, processes and services, based on the relevant consolidated findings of science, technology and experience.

2.1.9 *Statement*

An expression, in the content of a document, that conveys information.

2.2 *Elements of a Document***2.2.1** *Conditional Element*

An element that is present depending on the provisions of the document.

2.2.2 *Informative Element*

An element intended to assist the understanding or use of the document or that provides contextual information about the content, background, or relationship with other documents.

2.2.3 *Normative Element*

An element that describes the scope of the document or sets out provisions.

2.2.4 *Optional Element*

An element that the writer of a document may choose to include or not.

Section 3. Document Structure**3.1** *Document Types*

AHRI standards deliverables, including product standards, application standards, and guidelines, are defined in the *AHRI Standards Policy & Procedures* Section 3.2.

3.2 *Informative or Informational Text*

For AHRI standards, all informative or informational text shall appear in the appendices. Normative text is the default in standards; any informative text shall be clearly identified.

AHRI guidelines are entirely informative.

3.3 *High Level Document Structure*

AHRI standards and guidelines shall include the following structural elements:

- Front Matter (see Section 3.4 below).
- Body, sections for standards contain normative information (see Section 3.5 below).
- Appendices shall be identified as either normative or informative (see Section 3.6 below).

Refer to Table 1 and Table 2 below to see the structural elements in standards and guidelines, and if these are required, conditional, or optional, and informative or normative.

Table 1 Overview of the Major Sections of a Standard and Their Arrangement

Structural Element	Section	Required / Optional / Conditional	Normative / Informative	See Sections:
Front Matter	Front Cover	Required	Normative	3.4.1
Front Matter	Accreditation(s)	Conditional	Normative	3.4.2 and 3.4.3
Front Matter	Withdrawal Note and Statement on Front Cover and first page after Front Cover	Conditional	Informative	3.4.16
Front Matter	AHRI Copyright on first page after Front Cover	Required	Informative	3.4.4
Front Matter	AHRI Safety Disclaimer	Required	Normative	3.4.5
Front Matter	Supersedure Notice on first page after Front Cover	Required	Informative	3.4.6
Front Matter	Dual Standards Reference Note on first page after Front Cover	Conditional	Informative	3.4.7
Front Matter	Intent Statement on second page after Front Cover	Required	Informative	3.4.9
Front Matter	Review and Amendment Statement on second page after Front Cover	Required	Informative	3.4.10
Front Matter	Origin and Development Statement on second page after Front Cover	Required	Informative	3.4.11
Front Matter	Summary of Changes	Conditional	Informative	3.4.12
Front Matter	Committee Lists	Required	Informative	3.4.13
Front Matter	Consensus Body Lists	Conditional	Informative	3.4.14
Front Matter	Addendum and Errata Page	Conditional	Informative	3.4.15
Front Matter	Table of Contents	Required	Informative	3.4.17
Body	Section 1: Purpose	Required	Normative	3.5.1
Body	Section 2: Scope	Required	Normative	3.5.2
Body	Section 3: Definitions	Required	Normative	3.5.3
Body	Section: Classifications	Optional	Normative	3.5.4
Body	Section: Test Requirements	Required	Normative	3.5.5
Body	Section: Rating Requirements	Required	Normative	3.5.6
Body	Section: Minimum Data Requirements for Published Ratings	Required	Normative	3.5.7
Body	Section: Operating Requirements	Conditional	Normative	3.5.8
Body	Section: Marking and Nameplate Data	Conditional	Normative	3.5.9
Body	Section: Conformance Conditions	Required	Normative	3.5.10
Appendices	Appendix A: References - Normative	Required	Normative	3.6.1
Appendices	Appendix B: References - Informative	Required	Informative	3.6.2
Appendices	Appendix: Methods of Testing for Rating Equipment - Normative	Optional	Normative	3.6.3
Appendices	Additional Appendices	Optional	Informative or Normative	3.6.4

Table 2 Overview of the Major Sections of a Guideline and Their Arrangement

Structural Element	Section	Required / Optional / Conditional	See Sections:
Front Matter	Front Cover	Required	3.4.1
Front Matter	Withdrawal Note and Statement on Front Cover and first page after Front Cover	Conditional	3.4.16
Front Matter	AHRI Copyright on first page after Front Cover	Required	3.4.4
Front Matter	AHRI Safety Disclaimer	Required	3.4.5
Front Matter	Supersedure Notice on first page after Front Cover	Required	3.4.6
Front Matter	Dual Guideline Reference Note on first page after Front Cover	Conditional	3.4.7
Front Matter	Intent Statement on second page after Front Cover	Required	3.4.9
Front Matter	Review and Amendment Statement on second page after Front Cover	Required	3.4.10
Front Matter	Origin and Development Statement on second page after Front Cover	Required	3.4.11
Front Matter	Summary of Changes	Conditional	3.4.12
Front Matter	Committee Lists	Required	3.4.13
Front Matter	Addendum and Errata Page	Conditional	3.4.15
Front Matter	Table of Contents	Required	3.4.17
Body	Section 1: Purpose	Required	3.5.1
Body	Section 2: Scope	Required	3.5.2
Body	Section 3: Definitions	Required	3.5.3
Body	Additional Sections	Optional	—
Appendices	Appendix A: References - Informative	Required	3.6.2
Appendices	Additional Appendices	Optional	3.6.4

3.4 *Front Matter*

Document front matter shall only include objective, non-technical meta-information about the document and shall be prepared by AHRI staff independent of the consensus development process.

AHRI standard and guideline documents shall contain the front matter components in the following order: cover title pages, AHRI Copyright, Safety Disclaimer, Supersedure Notice, dual standard reference (if applicable), Intent Statement, Review and Amendment Statement, Origin and Development Statement, summary of changes, committee list(s), consensus body lists (if applicable), and table of contents.

The origin and development statement shall be a comprehensive history of the document from the first edition, including the purposes, major changes in the various editions through the years, and any changes in the committee structure during these periods.

The AHRI standard or guideline document front matter shall not contain AHRI Certification Program provisions, nor normative references to AHRI Certification Programs.

3.4.1 *Front Cover*

Required, Informative

The front cover title page shall carry the AHRI numeric designation for the document; the title of the document; the edition year; the AHRI logo; and the AHRI Address and contact information.

Examples of front covers and front matter are shown in Appendix A.

3.4.2 American National Standards Institute (ANSI) Designation

Conditional, Informative

Standards that are approved as American National Standards (ANS) shall follow formatting requirements of ANSI Guidelines for ANSI Logo and Mark Use.

After a standard is approved as an ANS, the AHRI Standards staff shall:

- Update the standard Front Cover Page (see Section 3.4.1) with the ANSI logo and approval date
- Update the standard title in the Page Headers (see Section 3.4.18) in the Body of the standard
- Add the approval date to the Origin and Development Statement (see Section 3.4.11)

See Section 3.2.3 *Naming* in the *AHRI Policy & Procedures for the Development of Standards (2021)* to see how the ANSI designation shall appear in the standard title. AHRI standards that are accredited by ANSI shall have the year in the title remain the same as the original publication if accreditation is approved in a subsequent year.

If a published standard has the ANS accreditation administratively withdrawn, then the AHRI Standards staff shall update the Front Cover Page, Page Headers, and relevant Front Matter information as appropriate.

See the ANSI logo in Figure 1 below.



Figure 1 ANSI logo

3.4.3 National Standards of Canada (NSC) Designation for Standards Council of Canada (SCC)

Conditional, Informative

Documents that are approved by the Standards Council of Canada (SCC) must follow formatting requirements of the *Requirements & Guidance – Accreditation of Standards Development Organizations*.

After a standard is approved as an NSC, the AHRI Standards staff shall:

- Update the standard Front Cover Page (see Section 3.4.1) with the SCC logo and approval date,
- Update the standard title in the Page Headers (see Section 3.4.18) in the Body of the standard,
- Add the approval date to the Origin and Development Statement (see Section 3.4.11).
- Add Front Matter information required by the SCC *Requirements & Guidance – Accreditation of Standards Development Organizations*.
- Publish the French translation.

See Section 3.2.3 *Naming* in the *AHRI Policy & Procedures for the Development of Standards (2021)* to see how the SCC designation shall appear in the standard title. AHRI standards that are accredited by SCC shall have the year in the title remain the same as the original publication if accreditation is approved in a subsequent year.

If a published standard has the NSC accreditation administratively withdrawn, then the AHRI Standards staff shall update the Front Cover Page, Page Headers, and relevant Front Matter information as appropriate.

See the bilingual SCC logos in Figure 2 and Figure 3.



Figure 2 SCC Logo Bilingual English First

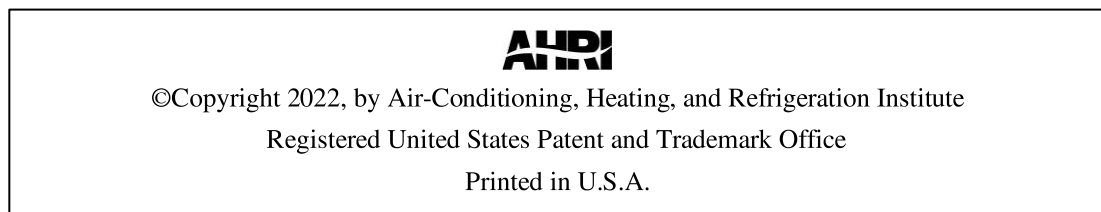


Figure 3 SCC Logo Bilingual French First

3.4.4 AHRI Copyright

Required, Informative

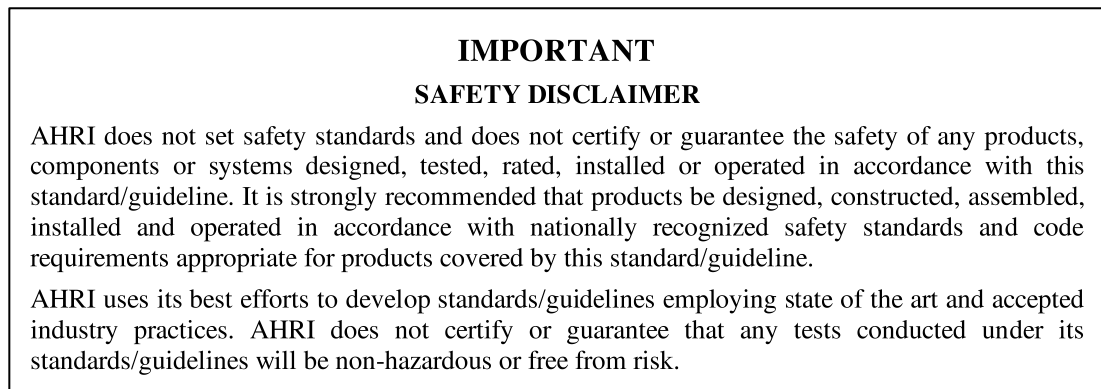
The AHRI copyright statement and image with the published year shall appear centered at the top of the first front matter page above the Safety Disclaimer. See the AHRI Copyright example below.



3.4.5 AHRI Safety Disclaimer

Required, Informative

The safety disclaimer shall be placed below the AHRI Copyright Statement on the first front matter page, after the front cover of each standard as shown here. The required wording follows:

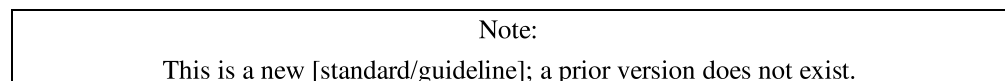


3.4.6 Supersedure Notice

Required, Informative

The appropriate statement identifying the version of a document shall be placed inside the first page following the front cover page of standards as shown here.

If a first-generation document is created, use the following required wording:



The required wording for revised documents follows:

Note:
This [standard/guideline] supersedes AHRI [Standard/Guideline] [number]-[year] [(units)]

If a document is reaffirmed, the following required wording shall follow the new standard or revised standard note:

Note:
This [standard/guideline] was reaffirmed [Month Year].

If a document is withdrawn, the following required wording new standard, revised standard, or reaffirmed standard note:

Note:
This [standard/guideline] was withdrawn [Month Year].

3.4.7 *Dual Standards Reference Note*

Conditional, Informative

The reference to the dual document in I-P or SI units shall appear below the Supersedure Notice.

Note:
This [standard/guideline] supersedes AHRI Standard [number]-[year] [(units)]
For [units] ratings see AHRI [Standard/Guideline] [number]-[year] [(units)]

3.4.8 *AHRI Certification Program Disclaimer*

Required, Informative

The AHRI Certification Disclaimer statement shall appear below the Supersedure Notice and Dual Standards Reference Note (if applicable). See the AHRI Certification Disclaimer below.

AHRI CERTIFICATION PROGRAM DISCLAIMER

AHRI Standards are developed independently of AHRI Certification activities and can have scopes that include products that are not part of the AHRI Certification Program. The scope of the applicable AHRI Certification Program can be found on AHRI's website at <http://www.ahrinet.org>.

3.4.9 *Intent Statement*

Required, Informative

All AHRI standards and guidelines shall have an Intent Statement. It shall appear on the second front matter page after the cover page. See the example of the Intent Statement below.

Intent
This standard is intended for the guidance of the industry, including manufacturers, engineers, installers, contractors, and users.

3.4.10 *Review and Amendment Statement*

Required, Informative

All AHRI standards and guidelines shall have a Review and Amendment Statement. It shall appear on the second front matter page after the Intent Statement. See the example of the Review and Amendment Statement below.

Review and Amendment
This standard is subject to review and amendment as technology advances.

3.4.11 *Origin and Development Statement*

Required, Informative

All AHRI standards and guidelines shall have an origin and development statement prepared by AHRI staff, independent of the consensus development process. It shall not contain requirements, permissions, or recommendations.

This statement shall appear on the second front matter page after the Review and Amendment Statement. If the standard has accreditation from ANSI or SCC, it shall include a statement indicating the date of ANSI or SCC approval, or both. An effective date is optional. The running summary of changes and the level of detail should be a couple of paragraphs or bullets. See the example of the Origin and Development Statement below.

202x Edition

This edition of AHRI Standard [number-year (units)], Performance Rating of XXXX was prepared by the XXXX Standards Working Group / XXXX Standards Technical Committee. It was approved by the XXX Standards Subcommittee on Day Month year, [with an effective date of Day Month Year].

Origin and Development of AHRI [number]

In 2005 the XXX Product Section identified the need for XXXXX and developed the first edition to provide a new definition of XXX.

In 2010 the standard was reaffirmed.

In 2015 an appendix was adopted to provide guidance to the AHRI Committees, regulatory officials, and other that addressed XXXX.

In 2020 the standard was extensively rewritten to introduce nomenclature related to XXXX.

3.4.12 *Summary of Changes*

Conditional, Informative

If a document supersedes a previous addition, or replaces a withdrawn document, then a sentence or paragraph shall be added to the origin and development statement outlining substantive changes in the latest revision. This should not be a detailed list of specific changes but instead a summary of topics addressed and rationale for changes. See the Summary of Changes example below.

AHRI Standard [number-year (units)] contains the following updates to the previous edition:

- XXXX language has been consolidated into one central section
- Definitions have been expanded to include XXXX and XXXX
- Language has been added to provide XXXX
- Additional language has been added to clarify XXXX requirements
- An additional procedure has been added to Appendix X and Appendix X
- New provisions have been added for testing XXXX
- Operating conditions have been harmonized with AHRI XXXX and now include XXXX.

3.4.13 *Committee Lists Page*

Required, Informative