Closed System Protection

A HOW-TO HANDBOOK FOR
PLANT MANAGERS AND FACILITIES ENGINEERS

Water chemistry determines corrosion rate.
Corrosion rate determines system longevity.
Therefore, water chemistry determines system longevity.
Myths Of System Failure

• It is impossible in airtight systems.
• It is inevitable because water is corrosive.
• It is best avoided by using treatment from specialty chemical companies.

Such misconceptions can be very expensive. Our mission is to provide objective guidance and leadership in the management and protection of closed water loops. This handbook is designed to help plant managers and facilities engineers make the transition to protective monitoring, which is essential to system efficiency, dependability and longevity.

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Table Of Contents

Introduction................................................................. 3

Problems With The Status Quo ........................................ 3
• A Typical Scenario
• Signs Of Trouble
• About Nitrite

Destructive Processes: Causes & Preventives .................... 4
• Corrosion
• Scaling
• Fouling

Intelligent Application Of Preventives ............................. 5
• Understanding Safe Zones
• Implementing Safe Zones

Do-It-Yourself Protective Monitoring .............................. 6
• Drawing Samples
• Analyzing Samples
• Correcting Chemistry
• Verifying Protection

Professional Protective Monitoring ................................. 8
• Performance Standards
• Participating Laboratories

Appendix................................................................. 10
• References
• Do-It-Yourself Supplies
Introduction

In open water systems – such as cooling towers and evaporative coolers – problems such as corrosion, scaling and fouling are apparent to anyone who takes a moment to peek through the access door.

In closed water systems – such as heated, chilled and steam loops – the interiors of boilers and pipes are permanently hidden from view. Problems such as corrosion, scaling and fouling can proceed unabated, until systems rupture and fail.

Most plant managers know that systems are best protected when the chemistry of the circulating water is routinely monitored and corrected to prevent harmful chemical reactions from doing irreversible damage. In others words, they realize that protective monitoring must be applied if systems are to perform for many decades.

What many plant managers do not know is how to conduct protective monitoring themselves, or how to find someone who does. Most closed system water-side management services are really sales schemes. Expensive, brand-name treatments, accompanied by free test kits and log sheets, are marketed by specialty chemical companies. Their commissioned salesmen often have little knowledge of water chemistry and limited technical training. Their focus is product sales, not system science.

Protective monitoring is defined and described here, so it may be implemented in-house, or successfully sought and contracted to qualified professionals. Either way, responsible, lifelong system protection, which holds corrosion at negligible levels and eliminates scaling and fouling, can be accomplished for less than $1 per day of system operation.

Problems With The Status Quo

A Typical Scenario
A new heating system is installed, and responsibility for its care is transferred to the plant manager. He is advised by the industry – the manufacturer, the mechanical engineer, the contractor, the boiler inspector, the insurance company – to contact a water treatment professional. The problem is there are very few qualified professionals – chemical engineers and water chemists – in the closed system protection business. Chemical sales companies have filled the void with expensive treatment products that are often 85% water. The plant manager may presume these companies will provide the guidance he seeks. Or, if he recognizes they are not an objective source of information, he may choose to do nothing.

Signs Of Trouble

- Water is not routinely analyzed.
- Corrosion rates are not measured.
- Water is cloudy, off-color or odiferous.
- Water has high conductivity or low pH.
- Zone-valves, pump-seals and boiler-tubes fail.
- Annual chemical costs exceed $30 per system.
- Treatment, if used, is added on a time-schedule.
- Pipes show rusting, pitting, grooving, deposits or scale.

About Nitrite
Sodium nitrite, mixed with sodium borate, is a standard offering among chemical sales companies. But, nitrite treatment is a poor choice for closed systems for a number of reasons.
First, nitrite is an environmental toxin. Second, it is aggressive to copper and brass. Third, at levels above target concentrations, it hardens rubber gaskets and forms abrasive crystals at evaporation sites, wearing seals and valves. At levels below target concentrations, it accelerates corrosion rates, making it worse than having no treatment. Fourth, nitrite is a ready source of food for the microbes that cause fouling.\(^1\)

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**Destructive Processes: Causes & Preventives**

**Corrosion**

Corrosion is the primary cause of failure in closed systems. Corrosion is the reversion of metal to its stable, oxidized, ore form. Iron, for example, reverts to various oxides we call “rust”. Corrosion processes are complex electrochemical reactions, with results ranging from pinpoint penetration to generalized metal loss.

**Causes Of Acidic (Etching) Corrosion**

Carbon dioxide dissolves in water, forming hydrogen ions and bicarbonate ions.

\[
\text{CO}_2 + \text{H}_2\text{O} \rightarrow \text{H}^+ + \text{HCO}_3^- 
\]

Oxygen dissolves in water and reacts with glycol, forming organic acids.

\[
\text{O}_2 + \text{H}_2\text{O} + \text{RCOH} \rightarrow \text{RCOO}^- + \text{H}^+ 
\]

Then, hydrogen ions accept electrons from metal, forming dissolved metal and hydrogen gas.

\[
\text{H}^+ + \text{M} \rightarrow \text{M}^+ + \text{H}_2 
\]

**Preventives\(^1\)**

Buffering agents provide hydroxide ions that combine with hydrogen ions, forming harmless water.

\[
\text{OH}^- + \text{H}^+ \rightarrow \text{H}_2\text{O} 
\]

Reducing agents provide ions that combine with dissolved oxygen, forming harmless compounds.

\[
\text{RO}_3^- + \text{O}_2 \rightarrow \text{RO}_4^- 
\]

**Cause Of Bi-metal (Galvanic) Corrosion**

An electrical potential exists between two dissimilar metals in a conductive solution. The relatively-active metal donates electrons to the relatively-inert metal, dissolving the former.

\[
\text{Fe} + \text{Cu} \rightarrow \text{Fe}^{2+} + \text{Cu}^- 
\]

**Preventives\(^1\)**

System-flushing decreases conductivity.

Film-forming agents provide electrochemical insulation for metal surfaces.

\[
\text{Fe} + \text{Cu} \rightarrow \text{Fe} + \text{Cu} 
\]

**Cause Of Oxidative (Rusting) Corrosion**

Oxygen dissolves in water and accepts electrons from iron, forming rust.

\[
\text{O}_2 + \text{H}_2\text{O} + \text{Fe} \rightarrow \text{Fe}^{2+}(\text{OH}^-)_2 
\]

**Preventive\(^1\)**

Reducing agents provide ions that combine with dissolved oxygen, forming harmless compounds.

\[
\text{RO}_3^- + \text{O}_2 \rightarrow \text{RO}_4^- 
\]
Scaling
Water lost from leaky seals, faulty valves, and plumbing work requires systems to draw make-up water, which may contain scale-forming minerals. The deposits they form on interior surfaces can accelerate wear on pumps and valves, and reduce operational efficiency.

**Cause Of Scaling**
Hardness ions in water react with bicarbonate, phosphate and silicate ions, forming precipitates. 
\[
\text{Ca}^{++} + \text{Mg}^{++} + \text{HCO}_3^- + \text{PO}_4^{3-} + \text{SiO}_2^{2-} \rightarrow \text{CaCO}_3 + \text{Ca}_3\text{PO}_4 + \text{MgHPO}_4 + \text{MgSiO}_3
\]

**Preventives**
Softening make-up water lowers concentration of hardness ions. Capping make-up rates at 10% of system volume per year lowers concentration of hardness ions.

Fouling
Fouling is relatively rare in closed systems. When it occurs, it leads to operational inefficiency and down-time, making it more of an inconvenience than a catastrophe. Fouling does not occur in heated loops where temperatures exceed 140 °F, and is unusual in chilled loops where glycol concentrations exceed 30%. If system temperature and glycol concentration are routinely below these levels, microbes may flourish.

**Cause Of Fouling**
Bacteria consume organic compounds (nitrites and dilute glycols) and proliferate.

**Preventives**
Avoiding nitrite treatment eliminates a food source. System-flushing to decrease nitrite levels to < 50 ppm reduces availability. Maintaining glycol concentrations above 30% creates an unfavorable osmotic environment.

**Intelligent Application Of Preventives**

<table>
<thead>
<tr>
<th>Destructive Process</th>
<th>Cause</th>
<th>Preventive</th>
<th>Safe Zone</th>
</tr>
</thead>
<tbody>
<tr>
<td>acid corrosion</td>
<td>low pH</td>
<td>add Dipotassium Phosphate</td>
<td>pH 9-10* / pH 10-12**</td>
</tr>
<tr>
<td>oxidative corrosion</td>
<td>dissolved oxygen</td>
<td>add Sodium Sulfite</td>
<td>30-50 ppm</td>
</tr>
<tr>
<td>bi-metal corrosion</td>
<td>no protective film</td>
<td>add Sodium Lauroyl Sarcosinate</td>
<td>20-30 ppm*</td>
</tr>
<tr>
<td>bi-metal corrosion</td>
<td>high conductivity</td>
<td>flush system*</td>
<td>&lt; 500 μmhos/cm*</td>
</tr>
<tr>
<td></td>
<td></td>
<td>blow down boiler**</td>
<td>&lt; 7000 μmhos/cm**</td>
</tr>
<tr>
<td>scaling deposits</td>
<td>hard make-up water</td>
<td>soften make-up water</td>
<td>&lt; 10% make-up* / &lt; 50 ppm**</td>
</tr>
<tr>
<td>microbial fouling</td>
<td>dilute glycol / nitrite</td>
<td>increase % glycol / use no nitrite</td>
<td>&gt; 30% glycol* / &lt; 50 ppm nitrite*</td>
</tr>
</tbody>
</table>

*For heated and chilled loops. **For steam loops.

Implementing Safe Zones
Safe-zone chemistry is the cornerstone of protective monitoring. A protective monitoring program consists of periodic water sampling and analysis, followed by a comparison of results to safe-zone standards. If any parameter lies outside its safe zone, the appropriate preventive action is taken to bring it into specification.
Do-It-Yourself Protective Monitoring

In-house protective monitoring requires a small initial investment and few hours of labor each year. The requisite tools\textsuperscript{3,4,5} and techniques are within everyone’s reach. Following are step-by-step instructions for a successful program.

**Drawing Samples**

A sample should be drawn every three months for heated or chilled loops, and every month for steam loops, during the period the system operates. If a system runs just part of the year, sample again right before shut-down to ensure it is protected before it sits idle. System water may be analyzed right at the valve, or collected\textsuperscript{3} and returned to a work area for analysis. A one-ounce sample is needed.

- Select a faucet not used to feed chemical into system.
- Open valve and allow fluid to run until its appearance stabilizes.
- Fill sample bottle all the way to the top, cap tightly and close valve.

**Analyzing Samples**

Seven parameters must be measured, two of which are particular to chilled and steam loops. Portable probes and field test kits\textsuperscript{4} are available for five of the parameters. The remaining two are gauged by sight.

**Opacity / Color:** An indication of corrosion products, organic matter and particulates present.
- Examine sample under good lighting, against a white background.
- Note opacity (“clear” or “cloudy”).
- Note color (“colorless”, “yellow”, “pink”, “rusty”, “brown”, etc.)
- Record values. Example: “clear/colorless”

**pH:** A measure of acidic or basic conditions.
- Make sure probe is properly calibrated (see manufacturer instructions).
- Remove cap, turn on probe and submerge tip in sample.
- Swirl gently until reading stabilizes.
- Record value as pH. Example: “pH 9.4”

**Sulfite:** A measure of Sodium Sulfite in ppm.
- Fill reaction tube with 25 ml of sample.
- Add one drop of phenolphthalein indicator and swirl (sample may turn red).
- While swirling sample, add acid-starch indicator one dipper-at-a-time until sample turns clear.
- Add two more dippers of acid-starch indicator and swirl to dissolve.
- Add iodide-iodate reagent one drop-at-a-time until sample turns blue.
- Multiply number of iodide-iodate drops used by ten.
- Record value as ppm. Example: 8 drops x 10 = “80 ppm”

**Sarcosinate:** A measure of Sodium Lauroyl Sarcosinate in ppm.
- Fill sample bottle about half-full and recap.
- Vigorously shake sample up and down for three seconds.
- Immediately remove cap and count seconds as you watch foam dissipate.
- Stop counting when clearing appears in the middle of foam.
- Multiply number of seconds counted by ten.
- Record value as ppm. Example: 3 seconds x 10 = “30 ppm”

**Conductivity:** A measure of dissolved inorganic salts in $\mu$hos/cm.
- Make sure probe is properly calibrated (see manufacturer instructions).
- Remove cap, turn on probe and submerge tip in sample.
- Swirl gently until reading stabilizes.
- Record value as $\mu$hos/cm. Example: “480 $\mu$hos/cm”
Freeze Point: *Temperature at which fluid freezes in °F (for chilled systems).*
- Make sure refractometer is properly calibrated (see manufacturer instructions).
- Make sure the prism surface is clean and dry.
- Use pipette to deposit two or three drops of sample onto surface.
- Close cover and make sure no bubbles are trapped and entire surface is wetted.
- Wait thirty seconds before taking reading.
- Read value at junction of blue and white fields.
- Record value as degrees Fahrenheit. Example: “-16 °F”

Hardness: *A measure of calcium carbonate in ppm (for steam systems).*
- Dip strip into sample and hold for 1 second, then remove and shake off excess water.
- Hold strip level, with test pad facing up, for 15 seconds.
- Compare test pad color to color chart printed on bottle.
- Estimate value if test pad color falls between chart colors.
- Record value as ppm. Example: “13 ppm”

Correcting Chemistry
Record test results in the appropriate box and compare each to its safe zone. If a value lies outside the safe zone, follow the action recommended for that parameter in the legend. This completes the protective monitoring cycle. Repeat the process every three months for heated and chilled systems, and every month for steam systems. Examples of safe-zone reports are given below.

<table>
<thead>
<tr>
<th>Safe Zones</th>
<th>Opacity / Color</th>
<th>pH</th>
<th>Sulfite</th>
<th>Sarcosinate</th>
<th>Conductivity</th>
<th>Action Taken</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heated Water System: 2014 REPORT</td>
<td>cloudy / rusty</td>
<td>7.5</td>
<td>0</td>
<td>0</td>
<td>2400</td>
<td>Flushed system. Added: Phosphate, Sulfite, Sarcosinate.</td>
</tr>
<tr>
<td>Jan</td>
<td>clear / colorless</td>
<td>8.4</td>
<td>60</td>
<td>40</td>
<td>420</td>
<td>Added: Phosphate.</td>
</tr>
<tr>
<td>Apr</td>
<td>clear / colorless</td>
<td>8.9</td>
<td>50</td>
<td>30</td>
<td>450</td>
<td>OK; no action necessary.</td>
</tr>
<tr>
<td>Jul</td>
<td>clear / colorless</td>
<td>9.0</td>
<td>40</td>
<td>30</td>
<td>440</td>
<td>OK; no action necessary.</td>
</tr>
<tr>
<td>Oct</td>
<td>clear / colorless</td>
<td>9.0</td>
<td>40</td>
<td>30</td>
<td>440</td>
<td>OK; no action necessary.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Safe Zones</th>
<th>Opacity / Color</th>
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<th>Conductivity</th>
<th>Freeze Point</th>
<th>Action Taken</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chilled Water System: 2014 REPORT</td>
<td>clear / colored</td>
<td>9.0</td>
<td>40</td>
<td>30</td>
<td>440</td>
<td>&lt; winter lows</td>
<td>OK; no action necessary.</td>
</tr>
<tr>
<td>Jan</td>
<td>clear / yellow</td>
<td>8.4</td>
<td>10</td>
<td>30</td>
<td>550</td>
<td>+16</td>
<td>Added: Phosphate, Sulfite.</td>
</tr>
<tr>
<td>Apr</td>
<td>clear / yellow</td>
<td>9.5</td>
<td>70</td>
<td>30</td>
<td>570</td>
<td>+16</td>
<td>OK; no action necessary.</td>
</tr>
<tr>
<td>Jul</td>
<td>clear / yellow</td>
<td>9.4</td>
<td>20</td>
<td>30</td>
<td>560</td>
<td>+16</td>
<td>Added: Sulfite.</td>
</tr>
<tr>
<td>Oct</td>
<td>clear / yellow</td>
<td>9.4</td>
<td>80</td>
<td>30</td>
<td>575</td>
<td>+17</td>
<td>OK; no action necessary.</td>
</tr>
</tbody>
</table>

Verifying Protection
Even if safe-zone chemistry is consistently maintained, it is wise to directly measure system protection. A *system monitor* consists of mild steel and copper, the most common metals in water systems. It is submerged in system water for one year. During this time, the monitor experiences corrosion, scaling and fouling at the same rate and to the same degree as the system. After this period, the monitor is returned to the laboratory, where it is examined and assigned a protection grade of “A”, “B”, “C”, “D” or “F”. An “A” indicates a corrosion rate lower than 0.1 mil per year, with no scaling or fouling.
Performance Standards
If you decide to contract closed system care, set standards for performance. Keep in mind that treatment chemicals are not inherently costly; they should be the least expensive part of a program. Any company asking for a chunk of your budget should meet a few basic criteria.

- Monitoring is emphasized, not chemicals.
- Objective protective standards are met.
- Corrosion rates are directly-measured.
- Treatment costs are minimized.
- Nitrites are not used.

Participating Laboratories
The following labs offer monitoring programs that meet the above criteria. About $1 a day retains an HVAC chemist and covers all program costs, including sampling kits, system monitors, laboratory analyses, and preventive treatment. For more information about their services, or for assistance with an in-house endeavor, contact the lab nearest you.

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References
1 ASHRAE has evaluated agents used to control water chemistry in heated and chilled systems: “Water Treatment In Closed Systems”, Darrell Hartwick (ashraejournal.org).


Do-It-Yourself Supplies
3 Sampling Supplies: $41
System water may be analyzed right at the valve, or collected and returned to a work area for analysis. If you choose the latter, we recommend having a few dozen sample bottles on-hand. These are tough enough to be re-useable, and affordable enough to be disposable. The caddy makes for easy toting of bottles as you make the rounds.

   • 1-Ounce Boston Round Bottle: freundcontainer.com #35001 (32¢/bottle x 100 bottles = $32)
   • Rubbermaid® Carry Caddy: officedepot.com #948315 ($9)

4 Probes & Test Kits: $287
These are sturdy, accurate, easy-to-use portable probes and field test kits.

   • Oakton PCTestr 35 pH/Conductivity Meter: amazon.com #WD35425-00 ($105)
   • Conductivity Calibration Solution: hach.com #1440042 ($17)
   • pH 4 Calibration Solution: hach.com #2283449 ($12)
   • pH 7 Calibration Solution: hach.com #2283549 ($12)
   • pH 10 Calibration Solution: hach.com #2283649 ($12)
   • Total Hardness Test Strips: hach.com #2745250 ($12)
   • Total Dissolved Iron Test Strips: hach.com #2745325 ($22)
   • Total Copper Test Strips: hach.com #2745125 ($22)
   • K-1529 Sulfite Test Kit: taylortechnologies.com ($48)
   • RHA-200ATC Refractometer: amazon.com ($25)

5 Preventive Treatment: $1233
These are undiluted active ingredients, so a little goes a long way. Quantities shown are the smallest available from the manufacturer.

   • Taylor Digital Scale With Bowl: walmart.com #380444 ($33)
   • Dipotassium Phosphate: univarusa.com #683518 ($5/# x 50# bag = $250)
   • Sodium Lauroyl Sarcosinate: univarusa.com Hamposyl® L-30 ($2/# x 450# drum = $900)
   • Sodium Sulfite: univarusa.com #353150 ($1/# x 50# bag = $50)