WINDOW REPLACEMENT INSTRUCTIONS FOR DOUBLE-HUNG VENT REPLACEMENT WINDOWS INTO EXISTING CASEMENT FRAME USING FRAME SCREWS

These instructions were tested and developed for replacing windows in wood frame wall construction systems designed to manage moisture. This method of installation involves removing the sash only of the existing window. The original window frame will remain in place and only the existing sash, frame stops and frame hardware must be removed. If existing window frame shows signs of water infiltration or is damaged beyond repair, this method should not be followed and the entire existing window should be removed. Installation recommendations for other types of wall construction, wall systems, conditions, multiple windows or bow/bay windows, may be obtained from Pella Corporation or a local Pella retailer. Building designs, construction methods, building materials, and site conditions unique to your project may require an installation method different from these instructions and additional care on your part. Determining the appropriate installation method is the responsibility of you, your architect, or other construction professional.

YOU WILL NEED TO SUPPLY:
• Cedar or Impervious shims/spacers (12 to 20)
• Closed cell foam backer rod/sealant backer (12 to 30 ft.)
• Great Stuff™ Window and Door Insulating Foam Sealant by the Dow Chemical Company or equivalent low pressure polyurethane window and door foam - DO NOT use high pressure or latex foams.
• #8 x 2” Flat head corrosion resistant wood screws
• #6 x 1/2” sheet metal screws (for head expander)

TOOLS REQUIRED:
• Tape measure
• Level
• Sealant gun
• Prybar
• Utility knife
• Putty knife
• Hammer
• Screwdrivers (Flat & Phillips)
• Adjustable pliers
• Side cutters
• Roto-tool, reciprocating saw
• Wood chisel
• 1/16” and 1/4” drill bit
• Drill

Installation will require two or more persons for safety reasons.

CAUTION: Many windows in older homes are painted with lead-based paint. Removal of old windows may disturb this paint. Proper precautions must be taken to minimize exposure to dust and debris. Consult state or local authorities for more information.

Always read the Vinyl Window and Door Limited Warranty before purchasing or installing Vinyl Windows and Doors manufactured by Pella Corporation. By installing this product, you are acknowledging that this Limited Warranty is part of the terms of the sale. Failure to comply with all Pella installation and maintenance instructions may void your Pella product warranty. See Limited Warranty for complete details at http://warranty.pella.com.
1 REMOVE THE EXISTING SASH

Note: Remove the new window from its packaging. Inspect and measure the new window to confirm it will fit into the opening prior to removing the existing window. The window needs to be 1/2" smaller in both width and height than the pocket frame.

A. Remove the existing sash. This will vary per manufacturer of the existing window. Removing the hinge and operator fasteners will generally allow the sash to be removed from the existing frame.

Note: Two or more people may be required when handling existing sash.

B. Remove operator hardware and all head, jamb, and sill stops. This can usually be accomplished with a prybar.

2 OPENING PREPARATION

A. Inspect the existing window frame and repair or replace any defective or rotted wood parts. Remove or seat any nails.

B. Clean the opening of any dirt, debris, or excess old paint before proceeding. Chisel off any high spots.

C. Apply one piece of sill flashing tape to the sill of the existing window frame. Cut the tape 12" longer than the existing window sill width. Apply the tape approximately 1" from the exterior on the existing sill and 6" up each jamb and press down firmly. The tape will not cover the sill depth completely under the new window.

D. Install and level sill spacers. Place 1" wide by 1/4" thick shims on the bottom of the window opening, 1/2" from each side and beneath integral mullions. Place additional 1" by 1/4" thick shims, ensuring the distance between the shims is not more than 18" on center. Adjust shims as necessary to ensure the sill is level.

Note: Improper placement of shims or spacers may result in bowing the bottom of the window.
3 SETTING AND FASTENING THE WINDOW

TWO OR MORE PEOPLE ARE REQUIRED FOR THE FOLLOWING STEPS.

A. Test fit the window in the opening. With the window closed and locked, set the bottom of the window into the opening, then tilt the top into position.

Note: The height of the window frame can be increased by as much as 3/8" by applying the head expander (included) to the window frame. If more than 3/8" height adjustment is required, install a continuous shim at the sill.

DO NOT use the head expander in High Performance installations.

B. Apply the head expander (if required). For installation using the head expander, go to INSTALLATION INSTRUCTIONS HEAD EXPANDER later in this instruction.

C. Insert the replacement window in the opening by first placing the bottom of the window on top of the shims on the sill of the opening. Tip the window upright into the opening.

Note: Use of a suction cup on the glass will assist in handling the window.

Note: Each existing window frame and wall depth will vary in different applications; therefore there is not a standard measurement for the overhang of the window frame to the exterior or for the distance from the interior face of the window to interior trim. When performing Steps 4F thru 4H, installing the frame screws, be sure to keep the distance consistent all around the window. Ensure anchors are driven into structurally sound materials.

Note: On the exterior, there must be enough room for backer rod and 1/4" sealant bead.
D. Place a shim near the top of one jamb, in line with the top pre-drilled hole in the window frame. Partially insert a #8 x 2” pan head screw (provided). Repeat process for other jamb.

*Note: Position the shims to ensure they allow at least 1/2” from the exterior surface of the window to allow for placement of backer rod and sealant.*

E. Continue placing shims at each pre-drilled hole as needed to plumb and square the window. Check the window for squareness by making sure the diagonal measurement from corner to corner of the replacement window is within 1/8” in both directions. Insert a #8 x 2” pan head screw into each pre-drilled hole in the frame. Finish inserting the top screw in each jamb.

*Note: DO NOT shim above the window. DO NOT over shim.*

F. Minor adjustments may be made at the checkrail using the jamb adjustment screws located in the lower sash channel, just above the checkrail.

*Note: Ensure the jamb adjustment screws are flush or just below flush with the sash track so they do not interfere with the travel of the balances.*

### 4 EXTERIOR SEAL

A. Insert backer rod into the space around the window at the head and jambas. This should provide at least 1/4” clearance between the backer rod and the exterior face of the window.

*Note: Backer rod adds shape and depth for the sealant line.*

B. Place a bead of sealant at the jambs and head between the existing window frame and the replacement window frame.

C. Begin the sill sealant bead 1/2” from one jamb, running it across the sill and stopping 1/2” from the opposite jamb. This 1/2” sealant gap on each side of the sill allows for incidental water drainage.

D. Shape, tool, and clean excess sealant. When finished, the sealant should be the shape of an hourglass.

*Note: This method creates a more flexible sealant line capable of expanding and contracting.*
CAUTION: Ensure use of low pressure polyurethane window and door insulating foams and strictly follow the foam manufacturer’s recommendations for application. Use of high pressure foams or improper application of the foam may cause the window frame to bow and hinder operation.

A. Apply insulating foam sealant. From the interior, insert the nozzle of the applicator approximately 1” deep into the space between the window and the rough opening and apply a 1” deep bead of foam. This will allow room for expansion of the foam and will minimize squeeze out. If using foam other than Great Stuff™ Window and Door Insulating Foam Sealant by the Dow Chemical company, allow the foam to cure completely (usually 8 to 24 hours) before proceeding to the next step.

Note: It may be necessary to squeeze the end of the tube with pliers to be able to insert into the space between the new and existing window frame. DO NOT completely fill the space from the back of the blind stops to the interior face of the opening.

B. Check the window operation by opening and closing the window.

Note: If the window does not operate correctly, check to make sure it is still plumb, level, square, and the jambs are not bowed. If adjustments are required, remove the foam with a serrated knife. Adjust the shims and reapply the insulating foam sealant.

Interior Finish or Trim:
The space between the new window and the existing window’s frame will need to be covered with trim. There are many ways to accomplish this and each case can be unique. How this is done will be the decision of the homeowner or window installer. A few recommendations include using cove, quarter round, or a stop moulding.

EXTERIOR FINISH OF EXISTING FRAME

Any exposed wood and flashing tape on the exterior needs to be covered/protected. There are many ways to accomplish this, and each case can be unique.
A few possibilities include:
a) Covering the existing trim with aluminum coil wrap/frame expander.
b) Sanding, priming and painting to match existing trim.
c) Covering the exposed wood with a high quality exterior grade sealant.

Note: The contractor/installer will determine how to finish the exterior.
A. **Make a pencil mark** 3/8" from the top of the window on the room side edge of each jamb.

B. **Install the head expander on the top of the window frame.** Slide the expander down onto the head as far as it will go.

C. **Test fit the window** into the opening. Slide the head expander up until the top of the head expander is within 1/4" of the top of the existing opening. Ensure the pencil marks are not visible. If the pencil mark is visible, the expander is extended too far. **Note: If the expander extends past the pencil mark it may be necessary to shim the original sill or to order a larger window.**

D. **Drill two 1/16" pilot holes** through the room side leg of head expander into the frame. These holes are to be 2" from each end of the head expander. Insert a #6 x 1/2" pan head sheet metal screw (not provided) into each hole.

E. **Proceed to Step 3C.**

**CLEANING INSTRUCTIONS**

Remove labels and clean the glass, using a soft, clean, grit-free cloth and mild soap or detergent. Be sure to remove all liquid by wiping dry or use a clean squeegee. The vinyl frame may be cleaned as described above. For stubborn dirt, a "non-abrasive" cleaner such as Bon-Ami® or Soft Scrub® may be used. **DO NOT** use solvents such as mineral spirits, toluene, xylene, naphtha or muriatic acid as they can dull the finish, soften the vinyl and/or cause failure of the insulated unit seal. Keep door tracks clear of dirt and debris. Keep weep holes open and clear of obstructions.
**CARE AND MAINTENANCE**

Care and maintenance information is available by contacting your local Pella retailer. This information is also available at [www.pella.com](http://www.pella.com).

**IMPORTANT NOTICE**

Because all construction must anticipate some water infiltration, it is important that the wall system be designed and constructed to properly manage moisture. Pella Corporation is not responsible for claims or damages caused by anticipated and unanticipated water infiltration; deficiencies in building design, construction and maintenance; failure to install Pella® products in accordance with Pella installation instructions; or the use of Pella products in wall systems which do not allow for proper management of moisture within the wall systems. The determination of the suitability of all building components, including the use of Pella products, as well as the design and installation of flashing and sealing systems are the responsibility of the Buyer or User, the architect, contractor, installer, or other construction professional and are not the responsibility of Pella.

Pella products should not be used in barrier wall systems which do not allow for proper management of moisture within the wall systems, such as barrier Exterior Insulation and Finish Systems, (EIFS) (also known as synthetic stucco) or other non-water managed systems. Except in the states of California, New Mexico, Arizona, Nevada, Utah, and Colorado, **Pella makes no warranty of any kind and assumes no responsibility for Pella windows and doors installed in barrier wall systems. In the states listed above, the installation of Pella products in barrier wall or similar systems must be in accordance with Pella installation instructions.**

Product modifications that are not approved by Pella Corporation will void the Limited Warranty.