

DECISION WORKSHEET

REPAIR OR REPLACE REPORT CARD

DECISION SECTION		Cooling and Heat Pumps (splits or packaged)	Furnaces and Boilers	Gas/Electric Packaged Units
Category	Points			
Complete this section to make a proper recommendation				
Age of Equipment				
0 - 5 years	1			
6 - 10 years	5			
11 - 20 years	10			
Over 20 years	20			
Estimated Cost of Repairs				
Less than \$100	1			
\$100 - \$500	5			
\$501 - \$1,000	10			
Over \$1,000	20			
Repairs Under Warranty				
Yes	0			
No	5			
SEER of Equipment¹				
14 and over	1			
11 - 13	5			
8 - 10	10			
5 - 7	20			
Type of Refrigerant Used²				
HFC	0			
CFC or HCFC	5			
AFUE³				
Over 90	1			
87 - 90	5			
80 - 87	10			
70 - 79	20			
Outdoor Equipment Condition⁴				
Good	1			
Average	5			
Fair	10			
Poor	15			
Indoor Equipment Condition^{5,6}				
Good	1			
Average	5			
Fair	10			
Poor	15			
Owner Expects to Stay in Home				
2 years or less	1			
2 - 5 years	5			
6 - 10 years	10			
Over 10 years	15			
Total Score				
Repair:	0 - 35	0 - 40	0 - 45	
Questionable:	36 - 50	41 - 60	46 - 70	
Replace:	51+	61+	71+	

Red Flags

Refer to the comfort advisor if the customer's system requires changes due to any of the following conditions / observations:

	Y	N
Airflow	<input type="checkbox"/>	<input type="checkbox"/>

- Are there airflow problems?
- Too hot in the summer or too cold in the winter?
- Leakage in the duct system?

Noise	<input type="checkbox"/>	<input type="checkbox"/>
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- Are there noise issues? (e.g., vibrations, whistling)

Refrigerants	<input type="checkbox"/>	<input type="checkbox"/>
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- Will I be changing refrigerants?
(May need to change metering device, line set, or coil)

Cycling	<input type="checkbox"/>	<input type="checkbox"/>
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- Is the unit cycling a lot?

Comfort	<input type="checkbox"/>	<input type="checkbox"/>
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- Have there been problems with comfort—too hot or too cold—in the past?

Remodeled	<input type="checkbox"/>	<input type="checkbox"/>
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- Since the house was built, has it been remodeled or have rooms been added-on?
(More rooms to heat/cool? More insulation?)

Building Codes	<input type="checkbox"/>	<input type="checkbox"/>
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- Have there been any changes in building or mechanical codes?
(e.g., aluminum wiring prohibited; ordinances for outside noise from condensing units.)

Venting	<input type="checkbox"/>	<input type="checkbox"/>
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- Are there any concerns about venting?
(e.g., a midrange furnace vented into a masonry chimney)

Fuel Changes	<input type="checkbox"/>	<input type="checkbox"/>
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- Would replacement be an opportunity to change fuel type?
(e.g., oil to gas; electric to gas; etc.)

Safety Issues	<input type="checkbox"/>	<input type="checkbox"/>
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- Carbon monoxide present?
- Fuel leaks?
- Unsafe wiring?

Repair History	<input type="checkbox"/>	<input type="checkbox"/>
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- Has the compressor been replaced?
- Has the heat exchanger been replaced?

Notes:

- Air Conditioners & Heat Pumps
- HFC (R134A, Puron® refrigerant), CFC (R12, R-500), HCFC (R-22)
- Furnaces, Boilers & Gas/Electric PACs
- Split Systems & Packaged Units only
- Fan Coils & Furnace Coils
- N/A for Packaged HP & AC

Reminder: If the outdoor unit is replaced, the indoor coil probably needs to be replaced.

Date: _____

Customer: _____

Technician: _____