



Turn to the Experts.™

DECISION WORKSHEET

REPAIR OR REPLACE REPORT CARD

DECISION SECTION		Cooling and Heat Pumps (split or packaged)	Furnaces and Boilers	Gas/Electric Packaged Units
Category	Points			
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				
Over 13	1			
10 - 13	5			
8 - 10	10			
5 - 7	20			
Type of Refrigerant Used²				
HFC	0			
CFC or HCFC	5			
AFUE^{3,7}				
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"/>
<ul style="list-style-type: none"> 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"/>
<ul style="list-style-type: none"> Are there noise issues? (e.g., vibrations, whistling) 		
Refrigerants	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> Will I be changing refrigerants? (May need to change metering device, line set, or coil) 		
Cycling	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> Is the unit cycling a lot? 		
Comfort	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> Have there been problems with comfort—too hot or too cold—in the past? 		
Remodeled	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> 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"/>
<ul style="list-style-type: none"> 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"/>
<ul style="list-style-type: none"> Are there any concerns about venting? (e.g., a midrange furnace vented into a masonry chimney) 		
Fuel Changes	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> 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"/>
<ul style="list-style-type: none"> Carbon monoxide present? Fuel leaks? Unsafe wiring? 		
Repair History	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> Has the compressor been replaced? Has the heat exchanger been replaced? 		

Notes:

- Air Conditioners & Heat Pumps
- HFC (R134A, Puron®), 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: _____