



Decision Workshop

Repair or Replace Report Card

Decision Section		Cooling and Heat Pumps (splits or packaged)	Furnaces and Boilers	Gas/Electric Packaged Units
Complete this section to make a proper recommendation				
Category				
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 \$100.00.....	1			
\$101-\$500.....	5			
\$501-\$1,000.....	10			
Over \$1,000.....	20			
Repairs Under Warranty				
Yes.....	0			
No.....	5			
SEER of Equipment ¹				
Over 13.....	1			
10-13.....	5			
8-10.....	10			
5-7.....	20			
Type or Refrigerant Used ²				
HFC.....	0			
CFC or HCFC.....	5			
AFUE ³				
Over 90.....	1			
89-90.....	5			
80-87.....	10			
70-79.....	20			
Outdoor Equipment Condition ⁴				
Good.....	1			
Average.....	5			
Fair.....	10			
Poor.....	20			
Indoor Equipment Condition ⁵				
Good.....	1			
Average.....	5			
Fair.....	10			
Poor.....	20			
Owner Expects to Stay in Home				
2 years or less.....	1			
2-5 years.....	5			
6-10 years.....	10			
Over 10 years.....	20			
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
Air Flow	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> Are there airflow problems? Too hot in summer or too cold in winter? Leakage in 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, R410A)
CFC (R12, R-500), HCFC (R-22)
- Furnaces, Boilers & Gas/Electric PACs
- Split Systems & Package Units Only
- Fan Coils & Furnace Coils
- N/A for Package HP & AC

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

Date: _____

Customer: _____

Technician: _____