



Turn to the Experts.™

# 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				
<b>Age of Equipment</b>				
0 - 5 years . . . . .	1			
6 - 10 years . . . . .	5			
11 - 20 years . . . . .	10			
Over 20 years . . . . .	20			
<b>Estimated Cost of Repairs</b>				
Less than \$100 . . . . .	1			
\$100 - \$500 . . . . .	5			
\$501 - \$1,000 . . . . .	10			
Over \$1,000 . . . . .	20			
<b>Repairs Under Warranty</b>				
Yes . . . . .	0			
No . . . . .	5			
<b>SEER of Equipment<sup>1</sup></b>				
14 and over . . . . .	1			
11 - 13 . . . . .	5			
8 - 10 . . . . .	10			
5 - 7 . . . . .	20			
<b>Type of Refrigerant Used<sup>2</sup></b>				
HFC . . . . .	0			
CFC or HCFC . . . . .	5			
<b>AFUE<sup>3</sup></b>				
Over 90 . . . . .	1			
87 - 90 . . . . .	5			
80 - 87 . . . . .	10			
70 - 79 . . . . .	20			
<b>Outdoor Equipment Condition<sup>4</sup></b>				
Good . . . . .	1			
Average . . . . .	5			
Fair . . . . .	10			
Poor . . . . .	15			
<b>Indoor Equipment Condition<sup>5,6</sup></b>				
Good . . . . .	1			
Average . . . . .	5			
Fair . . . . .	10			
Poor . . . . .	15			
<b>Owner Expects to Stay in Home</b>				
2 years or less . . . . .	1			
2 - 5 years . . . . .	5			
6 - 10 years . . . . .	10			
Over 10 years . . . . .	15			
<b>Total Score</b>				
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
<b>Airflow</b>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• Are there airflow problems?</li> <li>• Too hot in the summer or too cold in the winter?</li> <li>• Leakage in the duct system?</li> </ul>		
<b>Noise</b>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• Are there noise issues? (e.g., vibrations, whistling)</li> </ul>		
<b>Refrigerants</b>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• Will I be changing refrigerants? (May need to change metering device, line set, or coil)</li> </ul>		
<b>Cycling</b>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• Is the unit cycling a lot?</li> </ul>		
<b>Comfort</b>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• Have there been problems with comfort—too hot or too cold—in the past?</li> </ul>		
<b>Remodeled</b>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• Since the house was built, has it been remodeled or have rooms been added-on? (More rooms to heat/cool? More insulation?)</li> </ul>		
<b>Building Codes</b>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• Have there been any changes in building or mechanical codes? (e.g., aluminum wiring prohibited; ordinances for outside noise from condensing units.)</li> </ul>		
<b>Venting</b>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• Are there any concerns about venting? (e.g., a midrange furnace vented into a masonry chimney)</li> </ul>		
<b>Fuel Changes</b>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• Would replacement be an opportunity to change fuel type? (e.g., oil to gas; electric to gas; etc.)</li> </ul>		
<b>Safety Issues</b>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• Carbon monoxide present?</li> <li>• Fuel leaks?</li> <li>• Unsafe wiring?</li> </ul>		
<b>Repair History</b>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• Has the compressor been replaced?</li> <li>• Has the heat exchanger been replaced?</li> </ul>		

### Notes:

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

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

Date: \_\_\_\_\_

Customer: \_\_\_\_\_

Technician: \_\_\_\_\_