

DECISION SECTION	Points	Cooling and Heat Pumps (split or packaged)	Furnaces and Boilers	Gas/Electric Packaged Units
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 Equipment ^{1/}				
Over 10	1			
8 - 10	5			
5 - 7	10			
Less than 5	20			
Type of Refrigerant Used²				
HFC	0			
CFC or HCFC	5			
AFUE ^{1/}				
Over 87	1			
80 - 87	5			
70 - 79	10			
Less than 70	20			
Outdoor Equipment Condition³				
Good	1			
Average	5			
Fair	10			
Poor	15			
Indoor Equipment Condition^{3/4}				
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 - 40	0 - 35	0 - 45	
Questionable:	41 - 60	36 - 50	46 - 70	
Replace:	61+	51+	71+	

Red Flags

Refer to the sales department 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"/>
• Are there noise issues? (e.g., vibrations, whistling)		
Refrigerants	<input type="checkbox"/>	<input type="checkbox"/>
• Will I be changing refrigerants? (May need to change metering device, line set, or coil)		
Cycling	<input type="checkbox"/>	<input type="checkbox"/>
• Is the unit cycling a lot?		
Comfort	<input type="checkbox"/>	<input type="checkbox"/>
• Have there been problems with comfort—too hot or too cold—in the past?		
Remodeled	<input type="checkbox"/>	<input type="checkbox"/>
• 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"/>
• 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"/>
• Are there any concerns about venting? (e.g., a midrange furnace vented into a masonry chimney)		
Fuel Changes	<input type="checkbox"/>	<input type="checkbox"/>
• 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"/>
• Carbon monoxide present?		
• Fuel leaks?		
• Unsafe wiring?		
Repair History	<input type="checkbox"/>	<input type="checkbox"/>
• Has the compressor been replaced?		
• Has the heat exchanger been replaced?		

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

Date: _____

Customer: _____

Technician: _____