COMMERCIAL HVAC HANDOFF / 01

BUILD THE SHARED SYSTEM BRIEF

Use neutral labels and ordinary observations. Do not inspect, test, operate or enter equipment areas for this pack.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

Facility A / facility type / no address or account number

Ordinary occupancy, operating hours or continuity context

System A / provider to confirm type and served area / no serial number

Observation A / what was noticed / when / no diagnosis

Requested conversation lane / assessment, repair, replacement, controls, ventilation or provider-defined other

Available record title / date / custodian / private copy kept elsewhere

Preparation only. Not diagnosis, design, testing, operation, shutdown, restart, air-quality, code, permit, safety, contract or legal advice. No operating or occupancy decision.

COMMERCIAL HVAC HANDOFF / 02

SEPARATE FINDINGS, OPTIONS AND IMPACTS

Let the provider define technical findings and work. Keep options and operating responsibilities visible in writing.

Provider-stated assessed system and finding / evidence reference

Base proposal / included work / exclusions / open dependency

Alternative A / what changes / provider-stated reason

Access, downtime or operating impact / planning owner / open question

Controls, electrical, roof, utility, air-quality or adjacent role / owner

Change, completion, commissioning or closeout record / provider to return

Preparation only. Not diagnosis, design, testing, operation, shutdown, restart, air-quality, code, permit, safety, contract or legal advice. No operating or occupancy decision.

COMMERCIAL HVAC HANDOFF / 03

CHECK THE PROPOSAL-READY HANDOFF

Tick what is organized for comparison. These checks do not approve a design, repair, shutdown, restart or occupancy decision.

- [ ] Neutral facility, system and observation labels are consistent
- [ ] No address, account, access code, serial number or private plan is recorded
- [ ] Observations are separated from provider findings
- [ ] Every provider defines what it assessed
- [ ] Base scope, alternatives, exclusions and dependencies are separate
- [ ] Operating impacts and adjacent roles are requested in writing
- [ ] Expected change and closeout records are named
- [ ] Authorization and operating decisions remain outside this pack

Unresolved system, finding or scope difference / response owner

Operating-impact or adjacent-role question / answer reference

Closeout record or decision still needed / responsible party

Preparation only. Not diagnosis, design, testing, operation, shutdown, restart, air-quality, code, permit, safety, contract or legal advice. No operating or occupancy decision.

COMMERCIAL HVAC HANDOFF / 04

QUESTIONS FOR THE HVAC PROVIDER

Ask each provider the same system, finding, option, operating-impact, coordination and closeout questions.

System: what facility areas and systems did you assess?

Findings: what evidence supports each provider-stated finding?

Options: what changes between the base proposal and each alternative?

Operations: what access or operating impacts require separate facility decisions?

Coordination: who owns each controls, trade, utility or other adjacent role?

Closeout: what change, completion and handoff records are provided?

Preparation only. Not diagnosis, design, testing, operation, shutdown, restart, air-quality, code, permit, safety, contract or legal advice. No operating or occupancy decision.

COMMERCIAL HVAC HANDOFF / 05

COMPARE THE SAME SYSTEM BRIEF

Use Provider A and B. Clarify unlike systems, findings and operating responsibilities before comparing totals.

Provider A / B / proposal dates / shared Facility A and System A brief

Assessed system, findings, evidence and base option - A / B

Alternatives, exclusions, operating impacts and coordination roles - A / B

Changes, closeout records, timing, written terms and open questions - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai only if you choose, then start a Commercial HVAC request. Share a non-sensitive Facility A, System A and observation brief so participating pros can compete with proposals. Compare provider-defined findings, evidence, base scope, alternatives, exclusions, operating impacts, coordination, timing, written terms and fit. A provider-led site, system and records review may be needed before a final proposal.

One request. Every pro's best offer.

Start a request

Participation varies. A provider-led site, system and records review may be needed before a final proposal.

Planning guide: https://www.pickyourpro.ai/services/commercial-hvac

EPA: Building Air Quality Guide for Building Owners and Facility Managers (official reference)

ENERGY STAR: Operation and Maintenance Best Practices (official reference)

Preparation only. Not diagnosis, design, testing, operation, shutdown, restart, air-quality, code, permit, safety, contract or legal advice. No operating or occupancy decision.