HVAC REPLACEMENT / 01

DOCUMENT THE HOME, SYSTEM, AND COMFORT GOALS

Write known facts only. Mark unknowns for the contractor to evaluate.

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

Home type, approximate size if known, floors, spaces served, occupancy, and use constraints

Existing heating and cooling equipment, energy source, approximate age, and model information if known

Thermostats, zoning, indoor units, outdoor units, registers, returns, and other controls observed

Room-by-room comfort concerns, season, time of day, frequency, and desired result

Noise, humidity, dust, odor, operating, maintenance, or other owner-observed concerns

Photos, service records, manuals, prior proposals, utility information, or warranty records available

Preparation only. Not an assessment, diagnosis, system design, procedure, code, permit, contract, or legal guide.

HVAC REPLACEMENT / 02

MAP EQUIPMENT, CONNECTIONS, AND INCLUDED WORK

Ask the contractor to identify each interface and responsibility in writing.

Proposed indoor and outdoor equipment, controls, accessories, capacity basis, and alternatives explained

Existing equipment removal, disposal, retained components, protection, access, and restoration

Duct, register, return, filtration, zoning, airflow, insulation, sealing, or balancing evaluation and work

Electrical, fuel, venting, combustion, refrigerant, condensate, drainage, and ventilation interfaces

Thermostat, controls, sensors, network or app setup, owner access, and privacy questions

Design, permits, inspections, utility coordination, manufacturer registration, and other-trade responsibilities

Preparation only. Not an assessment, diagnosis, system design, procedure, code, permit, contract, or legal guide.

HVAC REPLACEMENT / 03

PREPARE EVALUATION, ACCESS, AND HANDOFF QUESTIONS

Tick what is ready; qualified professionals make technical and safety decisions.

- [ ] Known home, equipment, and control facts are recorded
- [ ] Comfort concerns are described by room and condition
- [ ] Photos and available records are organized
- [ ] The contractor will explain its home-specific evaluation and capacity basis
- [ ] Ducts, airflow, controls, and relevant interfaces are included in the evaluation questions
- [ ] Included work, exclusions, permits, inspections, restoration, and other trades will be written
- [ ] Startup, testing, user orientation, and completion records will be identified
- [ ] Warranty, maintenance, service, timing, payment, and scope-change terms will be compared

Site access, equipment locations, pets, occupants, work hours, parking, storage, and protection needs

Startup, testing, contractor-documented settings, inspection, and completion records requested

User orientation, maintenance plan, filters, warranties, service contacts, and follow-up questions

Preparation only. Not an assessment, diagnosis, system design, procedure, code, permit, contract, or legal guide.

HVAC REPLACEMENT / 04

QUESTIONS FOR THE HVAC CONTRACTOR

Record the provider's answer and the evidence it will deliver.

Evaluation: what home characteristics and tests support the proposed equipment and capacity?

Distribution: how will ducts, airflow, rooms, controls, and comfort concerns be evaluated?

Scope: what equipment, labor, materials, connections, removal, protection, and restoration are included?

Responsibilities: who handles design, permits, inspections, utilities, registration, and other trades?

Handoff: what startup, testing, settings, orientation, completion, warranty, and maintenance records arrive?

Terms: what timing, complete price structure, payment, change, service, and issue-resolution process applies?

Preparation only. Not an assessment, diagnosis, system design, procedure, code, permit, contract, or legal guide.

HVAC REPLACEMENT / 05

COMPARE THE SAME HVAC REPLACEMENT SCOPE

Use A and B in every box. Different evaluation bases need clarification first.

Provider A / Provider B / site-evaluation and proposal dates / same goals discussed?

Evaluation basis, proposed equipment, capacity explanation, ducts, airflow, and controls - A / B

Included installation, interfaces, removal, protection, restoration, exclusions, and responsibilities - A / B

Startup, handoff, warranty, maintenance, service, timing, complete price structure, and terms - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai and start an HVAC Replacement request if you choose; this step is optional. Share the known system facts, room-by-room comfort goals, access constraints, and the written outcome you want so participating pros can compete with proposals. Compare the evaluation basis, proposed equipment, complete installation scope, interfaces, exclusions, startup and handoff, timing, written terms, and fit.

One request. Every pro's best offer.

Start a request

Participation varies. A site evaluation may be needed before a final replacement proposal.

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

ENERGY STAR: When is it time to replace? (official reference)

ENERGY STAR: HVAC Quality Installation (official reference)

Preparation only. Not an assessment, diagnosis, system design, procedure, code, permit, contract, or legal guide.