PATTERSON MECHANICAL

Commercial HVAC Repair vs. Replacement Worksheet

A decision record for comparing an immediate repair with retrofit, phased replacement or full renewal.

> This worksheet does not supply a universal replacement percentage. Start with a diagnosed failure and compare complete scopes, remaining condition and business consequences.

Property / site _____

Address _____

Prepared by _____

Date _____

1. Define the immediate problem

Asset / area served _____

Observed symptom _____

Diagnosed failure _____

Likely root cause _____

Immediate safety / uptime need _____

What the proposed repair resolves _____

What the repair does not resolve _____

2. Evidence matrix

Factor	Points toward repair	Points toward planning replacement	Site finding
Diagnosed failure	Isolated, supportable component	Core section, recurring or unresolved cause	
Service history	Infrequent, unrelated repairs	Repeated calls, leaks, lockouts or failures	
Condition	Cabinet, coils, heat section and controls remain serviceable	Multiple deteriorated sections or poor serviceability	
Parts / refrigerant	Readily supported	Unavailable, constrained or incompatible	
Capacity / ventilation	Fits current use	Use, load, zoning or outdoor-air need changed	
Business consequence	Failure has a manageable contingency	Failure threatens operations, tenants, inventory or freeze protection	
Coordination	Simple access and limited adjacent scope	Roof, crane, controls, electrical, gas or permits are substantial	

3. Compare complete options

Option	Installed scope	Downtime	Known exclusions	Decision horizon
Repair				
Retrofit / controls				
Phased replacement				
Full renewal				

4. Replacement-scope completeness

Done	Scope item	Owner / exclusion
[ ]	Equipment selection and capacity basis	
[ ]	Demolition, disposal, curb and duct transitions	
[ ]	Roofing, structural review and crane access	
[ ]	Electrical service, disconnects and controls	
[ ]	Gas piping, venting and combustion air where applicable	
[ ]	Drainage and condensate route	
[ ]	Permits, inspections and professional design	
[ ]	Temporary conditioning and tenant / operating plan	
[ ]	Startup, commissioning, warranty and training	

5. Decision record

Selected option _____

Reason _____

Assumptions to verify _____

Approval / date _____

Next review date

A repair can be the correct immediate action while replacement planning begins. Record both decisions so an emergency response does not become an undocumented long-term strategy.