

# HVAC Scope of Work Template: Free Download (2026)

Free HVAC scope of work template with equipment specs, SEER ratings, ductwork details, and load calculations. Copy-paste ready for installs and replacements.

## What Goes in an HVAC Scope of Work

HVAC is one of the most spec-heavy trades in residential contracting. A furnace swap that looks simple on the surface involves equipment compatibility, ductwork sizing, refrigerant handling, electrical requirements, and code compliance. Here is what your scope must cover.

### Equipment Specifications

This is the core of any HVAC scope. Specify every piece of equipment by manufacturer, model number, tonnage (or BTU capacity), and efficiency rating. Never write "new air conditioner" -- write "Carrier 24ACC636A003, 3-ton, 16 SEER2, R-410A refrigerant." The model number eliminates ambiguity about features, efficiency tier, and warranty coverage.

- Air conditioner or heat pump: Manufacturer, model, tonnage, SEER2 rating, HSPF2 (heat pumps), refrigerant type
- Furnace: Manufacturer, model, BTU input/output, AFUE rating, fuel type, stage (single, two-stage, modulating), blower type (PSC or ECM)
- Air handler: Manufacturer, model, CFM rating, coil compatibility
- Evaporator coil: Manufacturer, model, must be AHRI-matched to outdoor unit
- Mini-split: Outdoor unit model, indoor head models and quantities, BTU per head, SEER2

### SEER2 and Efficiency Compliance

Since January 2023, all new residential AC and heat pump equipment must meet SEER2 minimums. Your scope should state the SEER2 rating and confirm it meets the federal minimum for your DOE climate region. In the South and Southwest, the minimum is 15 SEER2 for split systems. In the North, it is 14.3 SEER2. Getting this wrong means the equipment cannot legally be installed.

### Ductwork

Even on a straight equipment replacement, ductwork needs attention in the scope. Are you reusing existing ducts? Sealing connections? Adding returns? Replacing a section? Document everything.

- Existing ductwork: Reuse as-is, seal all connections with mastic, or replace specific runs
- New ductwork: Material (galvanized sheet metal, flex duct, duct board), insulation R-value, sizing per Manual D
- Duct sealing: Method (mastic, foil tape, Aeroseal), performance target if applicable
- Returns: Number, size, and location of return air grilles
- Supply registers: Number, size, type (ceiling, floor, sidewall)

### Load Calculation

Reference your Manual J load calculation in the scope. Most jurisdictions require it for new installations and size

changes. Even where not required, it protects you from "the system is too small" or "it runs constantly" complaints. State the design cooling load (BTU), heating load (BTU), and the outdoor design temperatures used in the calculation.

### Thermostat

Specify the thermostat brand, model, and whether it requires a C-wire. If the existing wiring does not support the new thermostat, call out the wiring upgrade as a line item. Smart thermostat compatibility with the HVAC system (heat pump vs. conventional, staging) is a common source of callbacks.

### Electrical Requirements

Document the disconnect type, circuit breaker size, and wire gauge for the outdoor unit. If the new equipment draws more amps than the existing circuit, a panel upgrade or new circuit may be needed -- that is a separate line item and possibly a separate electrician.

### Refrigerant

State the refrigerant type (R-410A, R-32, or R-454B for newer equipment). If removing an old R-22 system, document proper recovery and disposal per EPA Section 608 requirements. Never mix refrigerants with existing line sets without specifying a flush or replacement.

### Permits and Inspections

Mechanical permits are required in virtually every jurisdiction for HVAC replacements. Some areas also require a separate electrical permit for the disconnect. State who pulls each permit, who pays, the applicable code (IMC 2021 or local), and the number of inspections required.

### Exclusions

Common HVAC exclusions that must be written into the scope:

- Electrical panel upgrades or new dedicated circuits (unless priced)
- Gas line extensions or upsizing
- Drywall, ceiling, or soffit repair after ductwork modifications
- Roof penetration repair or flashing (for rooftop units)
- Asbestos abatement on existing ductwork or pipe insulation
- Structural modifications for equipment placement
- Crane or rigging for rooftop equipment (price separately)

## Copy/Paste HVAC Scope of Work Template

Customize the placeholders in brackets for your specific job. This template covers a residential split system replacement -- adjust for furnace-only, mini-split, or commercial installations as needed.

## HVAC SCOPE OF WORK

Project: [Project Name / Address]  
Client: [Client Name]  
Contractor: [Your Company Name], License #[License Number]  
Date: [Date]  
Valid for: 30 days from date above

## 1. PROJECT OVERVIEW

Scope: [Split system replacement / Furnace replacement / Mini-split install / etc.]  
Existing system: [Brand, model, tonnage, age, refrigerant type of system being replaced]  
Location: [Equipment locations -- attic, garage, closet, crawlspace, exterior pad]  
Estimated duration: [X] working days  
Work hours: [8:00 AM - 5:00 PM, Monday - Friday]

## 2. EQUIPMENT -- OUTDOOR UNIT

Type: [Air conditioner / Heat pump]  
Manufacturer: [e.g., Carrier / Trane / Lennox / Goodman]  
Model number: [e.g., Carrier 24ACC636A003]  
Tonnage: [X] tons  
SEER2 rating: [XX.X SEER2]  
HSPF2 (heat pump only): [X.X HSPF2]  
EER2: [XX.X]  
Refrigerant: [R-410A / R-32 / R-454B]  
Electrical: [XXA, XXX V, single-phase]  
Pad/stand: [New composite pad / Existing pad / Rooftop curb]

## 3. EQUIPMENT -- INDOOR UNIT

Type: [Gas furnace / Air handler / Fan coil]  
Manufacturer: [e.g., Carrier 59TP6B080V21-22]  
BTU input/output: [XX,000 input / XX,000 output] (furnace only)  
AFUE: [XX%] (furnace only)  
Fuel type: [Natural gas / Propane / Electric]  
Stages: [Single-stage / Two-stage / Modulating]  
Blower motor: [PSC / ECM variable-speed]  
CFM: [XXXX CFM at 0.5" external static]  
Location: [Attic / Basement / Utility closet / Garage]

## 4. EVAPORATOR COIL

Manufacturer: [Must be AHRI-matched to outdoor unit]  
Model number: [e.g., Carrier CNPVP3617ALA]  
Configuration: [Upflow / Downflow / Horizontal]  
TXV: [Included -- YES/NO]

## 5. THERMOSTAT

Brand and model: [e.g., Ecobee Smart Thermostat Premium]  
Type: [Programmable / Smart / Non-programmable]  
C-wire: [Existing C-wire verified / New C-wire to be run / Add-a-wire kit]  
Compatibility: [Verified for [heat pump / conventional / 2-stage] operation]  
Location: [Existing location / Relocate to [new location]]

## 6. DUCTWORK

Existing ductwork: [Reuse / Modify / Replace]  
Duct sealing: [Seal all accessible connections with UL-listed mastic -- YES/NO]  
New duct runs: [Describe any new runs -- material, size, insulation]

Return air: [Existing returns adequate / Add [X] new returns -- size and location]  
Supply registers: [Existing registers / Replace [X] registers -- type and location]  
Duct insulation: [R-[X] insulation on all supply runs in unconditioned space]  
Filter: [Size, type -- e.g., 20x25x4 MERV 11, location]

#### 7. REFRIGERANT LINES

Line set: [Reuse existing / Replace with new [X/X"] copper line set]  
Line set insulation: [3/4" Armaflex on suction line]  
Refrigerant flush: [Required if changing refrigerant type -- YES/NO]  
Recovery of existing refrigerant: [Per EPA Section 608 -- contractor responsible]

#### 8. ELECTRICAL

Disconnect: [New non-fused disconnect at outdoor unit -- YES/NO]  
Circuit breaker: [XX amp breaker -- verify existing or install new]  
Wire gauge: [#XX AWG copper]  
Electrical permit: [Required -- separate from mechanical permit -- YES/NO]  
Note: [Electrical panel upgrade NOT included -- see exclusions]

#### 9. LOAD CALCULATION

Reference: Manual J performed on [date] by [company]  
Design cooling load: [XX,XXX BTU]  
Design heating load: [XX,XXX BTU]  
Outdoor design temp (cooling): [XXX F, X% design day]  
Outdoor design temp (heating): [XX F]  
Note: Equipment sized per Manual S based on Manual J results

#### 10. DISPOSAL AND CLEANUP

Old equipment: [Contractor removes and disposes of all old equipment]  
Refrigerant recovery: [Per EPA Section 608 -- certified technician on site]  
Debris: [All packaging, old ductwork, and materials removed daily]  
Site cleanup: [Broom-clean work area upon completion]

#### 11. PERMITS AND INSPECTIONS

Mechanical permit: [Contractor pulls -- cost included / billed at cost]  
Electrical permit: [Required / Not required -- if required, pulled by [contractor / elec...]  
Permit cost: [\$XXX estimated]  
Code: [IMC 2021 / Local mechanical code -- specify edition]  
Inspections: [Rough-in (if new ductwork), final mechanical, electrical (if applicable)]  
Scheduling: [Contractor responsible for all inspection scheduling]

#### 12. EXCLUSIONS (work NOT included)

- Electrical panel upgrades or new dedicated circuits
- Gas line extension, relocation, or upsizing
- Drywall, ceiling, or soffit repair after ductwork changes
- Roof penetration repair or flashing (rooftop units)
- Asbestos abatement on existing ductwork or insulation
- Structural modifications to accommodate new equipment
- Crane rental for rooftop equipment (priced separately if needed)
- Duct cleaning (recommend scheduling separately after install)
- [Any other project-specific exclusions]

#### 13. WARRANTY

Equipment warranty: [X years parts / X years compressor (per manufacturer)]  
Labor warranty: [X year(s) from completion date]  
Warranty registration: [Contractor registers equipment within 60 days of install]  
Extended warranty: [Available -- [cost] for [X] additional years -- YES/NO]  
Conditions: [Warranty void if: filter not changed per schedule, non-licensed]

person services equipment, or thermostat set below manufacturer minimum]

#### 14. PAYMENT SCHEDULE

Deposit: [XX%] due at contract signing -- \$[Amount]

Equipment delivery: [XX%] due when equipment arrives on site -- \$[Amount]

Completion: [XX%] due after final inspection and system commissioning -- \$[Amount]

Total contract price: \$[Total]

#### 15. CHANGE ORDER PROCESS

Any work not described above requires a written change order signed by both parties before work begins. Change orders will be priced at cost-plus [XX%] or per the attached rate sheet.

Accepted by:

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

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

*Pro Tip: Include the AHRI Certificate Attach the AHRI certificate showing your outdoor unit, indoor unit, and coil are a matched system. This proves the SEER2 rating is valid for the combination (not just the outdoor unit alone), satisfies inspectors, and qualifies the system for utility rebates that require AHRI-matched equipment. You can download certificates free from the AHRI directory.*

## Common Mistakes in HVAC Scope of Work

### 1. Not Referencing a Load Calculation

Installing a 4-ton system because "the old one was 4 tons" is not engineering -- it is guessing. The old system may have been oversized from day one, or the home may have had insulation or window upgrades since it was installed. Your scope should reference a Manual J calculation that justifies the equipment size. If the customer refuses to pay for a load calc and the system short-cycles or cannot keep up, you own that problem.

### 2. Omitting SEER2 Compliance Language

Since 2023, equipment sold in the US must meet SEER2 minimums by DOE region. If you install a unit that does not meet the minimum for your region, the installation is technically non-compliant. Your scope should state the SEER2 rating and confirm compliance. This is especially important when installing equipment purchased from a distributor with old inventory -- a unit manufactured before 2023 may use the old SEER scale.

### 3. Not Specifying Line Set Handling

Reusing an existing line set saves \$300-\$600, but it is not always appropriate. If the old system used R-22 and the new system uses R-410A, the line set must be flushed or replaced -- residual mineral oil from R-22 systems is incompatible with POE oil in R-410A systems. If you reuse without flushing, compressor failure is likely within 2-3 years. Document your line set decision in the scope with rationale.

### 4. Ignoring the Thermostat Compatibility

A smart thermostat that worked with the old single-stage furnace may not support the new two-stage heat pump without

rewiring. If the existing thermostat wire is 4-conductor and the new system needs 8-conductor, someone has to run new wire. That is a \$200-\$400 task that belongs in the scope, not a surprise on install day when the tech discovers it at 4 PM.

*The Mismatched System Trap An HVAC contractor installed a 16 SEER2 condenser with an older coil that was not AHRI-matched. The system ran, but it operated at 13 SEER2 -- below the federal minimum. The utility rejected the customer's rebate application, the inspector flagged the mismatch, and the contractor had to replace the coil at cost. Total loss: \$1,800 plus the callback time. Always verify AHRI matching before writing the scope.*

## How BuildFolio Streamlines HVAC Scope of Work

HVAC scopes have more specifications per page than almost any other trade. BuildFolio reduces the documentation burden with tools purpose-built for mechanical contractors.

- AI Photo-to-Quote: Photograph the existing equipment and BuildFolio reads the model and serial number plate, identifies the system type and tonnage, and pre-fills your scope with the removal line items. No more squinting at faded data plates in a dark attic.
- Satellite Measurements: For commercial rooftop units, get roof dimensions and equipment placement measurements from satellite imagery. Plan crane access, curb locations, and line set routing before the site visit.
- Living Estimates: Equipment specs, AHRI certificates, and scope details live in one digital estimate the customer can review and approve on their phone. When equipment availability changes and you need to swap models, update the estimate in real time -- no reprinting, no version confusion.
- Profit Tracking: After every HVAC install, compare scoped costs versus actual costs. Identify where your estimates drift -- refrigerant, labor hours, ductwork materials -- and adjust future scopes based on real data.

## HVAC Scope of Work FAQ

### Related Templates & Guides

## Stop Writing HVAC Scopes from Scratch

BuildFolio generates HVAC scopes of work with AI-powered equipment identification and AHRI matching verification. \$39/month. No contracts. Cancel anytime.

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