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WRITTEN RECORDS

There should be a formal system of record keeping on each project. When beginning a new project, it is good practice to check the contract to see what documentation is required. Prepare a checklist of all contract notice and record retention requirements. The records should include, at a minimum, the following material:

- ✓ Literature from manufacturers of materials and systems, especially new ones, and any correspondence with the manufacturer about those materials.
- ✓ Copies of all manufacturers' warranties.
- ✓ A summary of every job site meeting and the key points that were discussed.
- ✓ A copy of every memo sent to other parties involved in construction.
- ✓ All documentation related to change orders and claims for delays or extras.
- ✓ Documentation of all oral advice given to the client and contractor, including notations of all telephone conversations.
- ✓ Accurate records of all professional opinions given by the design professional to the contractor or client, or both, with written confirmation of their rejection and the design professional's opinion of the inherent risk.
- ✓ All correspondence with the contractor, both sent and received.
- ✓ A list of all deficiencies discovered by the design professional's field personnel and the steps taken to effectuate their correction.
- ✓ A description of the circumstances surrounding all substitutions of materials approved by the design professional and client, including any written warnings of possible problems or risks as a result of such substitutions.
- ✓ A copy of all correspondence (letters or memos) sent to the client, as notification of the design professional's inability to assess certain aspects of the construction that should have been seen but were covered up at the time of the visit.
- ✓ Complete reports on all site visits.
- ✓ A description of all circumstances surrounding instances of lack of cooperation on the part of any other party.
- ✓ Submittal logs.
- ✓ Closeout documentation.
- ✓ Updated and revised plans and specifications, including a running account of all known revisions and changes made to the original plans and specifications.
- ✓ A complete set of all submitted shop drawings and other pertinent correspondence and data.
- ✓ A complete set of progress schedules and updates.
- ✓ A daily job site log which includes:
 - ✓ The author's name
 - ✓ Relative stage of completion
 - ✓ The date and time
 - ✓ Employees on the job and their responsibilities
 - ✓ Weather conditions
 - ✓ Equipment on the job
 - ✓ Material delivered to the site and its condition

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- ✓ Any visitors or observers out of the ordinary.
- ✓ Any problems encountered during the reporting period.
- ✓ Photographs to document progress or failures and deficiencies.
- ✓ Documentation of any changes to your contract, such as scope or time extensions, including any impact on fees.