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PROJECT RECORDATION

Documentation should be prepared as soon as possible during the course of the project. Paperwork with dates, times and authors' signatures is much more credible than reports that are only written up after a problem arises. Those documents should also be as objective as possible. Facts should be recorded, not opinions or conclusions, because the notes are being made, presumably, at only one place and time, when the design professional may have only a narrow view of a situation.

There should be written records of:

- ✓ Telephone calls
- ✓ Meetings
- ✓ Contracts
- ✓ Approvals
- ✓ Drawings, specifications, calculations, reports and correspondence
- ✓ Design criteria and standards
- ✓ Advisory letters
- ✓ Product research
- ✓ Submittal logs
- ✓ Site visit reports
- ✓ Correspondence with contractors, both sent and received
- ✓ Change order data
- ✓ Closeout documentation

Requiring and maintaining these records is both good risk control and good business management. As web-based project management systems become more common, care should be taken that the systems record communications and actions. Long-term preservation of a web-based system must also be considered.