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RECORDS

Much of the value of good communication is lost without documentation. Design professionals can face detailed questions many years after an event or incident took place. Without written records, disputes with contractors and clients may well be decided on some other basis than the facts as recalled by the design professional.

There should be a formal system of record-keeping on each project and 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 acceptance or rejection and the design professional's opinion of the inherent risk
- ✓ 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 including any written warnings of possible problems or risks as a result of such substitutions
- ✓ A copy of all correspondence 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
- ✓ A description of all circumstances surrounding instances of lack of cooperation on the part of any other party