

PROJECT DOCUMENTS

Quality Control Checklist

READ THE CONTRACT!

Prepare a summary list of all project document requirements answering the following questions:

- When is the document due?
- Who should the document be sent to?
- What information must the document contain?
- Who will be responsible for preparing it?

SEND DOCUMENTS ON TIME TO THE RIGHT PEOPLE

Adhere to contract time periods and send to required recipients. Maintain evidence of transmittal (cover email, Fedex or mail confirmation, etc.).

MAINTAIN A PROJECT DOCUMENT DATABASE

Save all project documents in a centralized database along with transmittal evidence. Maintain an up-to-date log and index of all project documents for easy search and access. Do not rely on personal email folders for document storage!

ROUTINELY DOCUMENT PROJECT ACTIVITY

Take date-stamped progress photos and video of work accomplished. Maintain a log documenting when (i) work is moved from one part of the project to another by the owner, owner's representative, design professional or (if a subcontractor) general contractor, (ii) work is left unfinished due to interference with, or interference by, the work of others on the project, and (iii) other changes in work flow. Maintain the photos, videos and log with project documents.

GET IT IN WRITING

Do not rely on verbal instructions or agreements. Make sure all key agreements are reduced to writing.

PROVIDE DOCUMENTARY SUPPORT

For any requests for additional costs, time extensions, or other relief, include specific references to the contract provisions, drawings and specifications, or other relevant documents that support the request. Attach as much supporting documentation as possible (photographs, drawings, reports, bids, email correspondence, etc.).

BE ACCURATE

Make sure all documents reflect your best understanding of the facts and status of the project. If you have to negotiate to get an agreement (for example on a pay application), be sure to reserve your rights if pending claims or change orders are excluded.

DON'T RELY TOO MUCH ON EMAIL AND MESSAGE APPS

While email is unavoidable in today's business world, it should only be used to transmit project documents and for informal communications. Email alone is not a substitute for properly prepared project documents such as claims notices and change orders.

BE CONSISTENT IN CONTENT AND FORMAT

Establish the document content requirements and format at the beginning of a project and be consistent throughout the project.