

Job closeout sheet

Print this and work down it before you sign off any job, whichever vendor did the work. A job closed against a written sheet leaves a file the next manager can use.

Scope against the work order

- ☐ Work order number and property on the report match the one you raised
- ☐ Equipment identified by location, model and serial
- ☐ Fault described, with the cause found as well as the symptom reported
- ☐ Work performed matches what was asked for
- ☐ Readings recorded where relevant, such as pressures or current
- ☐ Report was filed at the end of the visit

Photographs

- ☐ Before photographs show the condition found
- ☐ After photographs show what was done
- ☐ Anything now concealed was photographed first
- ☐ Model and serial labels photographed
- ☐ Photo files match the item numbers on the list

Punch items and open work

- ☐ Closeout lines match your punch list item numbers
- ☐ Every item is marked done, not done or deferred
- ☐ Any item not done has a reason written down
- ☐ Recommendations and deferred items are in the file
- ☐ Outcome matches what you asked for, such as make good or touch in
- ☐ Next visit is agreed for anything still open

Invoice lines

- ☐ Work order reference matches the report
- ☐ Call-out charge appears once per visit and was disclosed before dispatch
- ☐ Hours match the report and the number of technicians is stated
- ☐ Rate applied is the one agreed for that time of day
- ☐ Travel is not billed as labor as well as a call-out
- ☐ Parts named by part number, description and quantity

File it

- ☐ Report, photographs and invoice stored against the asset
- ☐ Repeat failures on the same equipment noted
- ☐ Cost split recorded where it passes to a tenant
- ☐ Sheet dated