

Documenting for Dollars

How writing it all down can mean money in your pocket.

By Steve Wilders

Foremen and superintendents should be equipped with the forms necessary for documenting their job completely and effectively. These should include daily logs, request for information forms and speed memos.

Having the forms is not enough. It's equally important to keep track of requests for information, speed memos, meetings, etc. A simple log book and numbering system will do that. Keep copies of all documentation. These copies should be kept in an organized filing system both on the job site and at the office.

Verification is also very important in the documentation process. This is simply getting the general contractor to acknowledge the receipt and/or existence of a documented item. Overall, anytime you submit something to a general contractor you want to get him to sign or initial your copy and date it. This eliminates any future claims that it wasn't received. If they refuse, then indicate this on the documented item, sign and date it. Ideally you want to use NCR paper or carbon paper so signatures appear on all copies.


Minutes of subcontractor's meetings are helpful and are often provided by the general contractor. However, if they are not provided or reflect something different than what you feel was discussed at the meeting, keep your own set of minutes and forward a copy to the general contractor.

Video tape, audio tape, and photos are extremely valuable in documenting potentially damaging situations. They afford you the opportunity to record working conditions and situations as they actually are thus showing things that may be missed in written documentation.

Many foremen and superintendents are intimidated when it comes to writing things down. Often times they

feel they don't have the skills necessary to write out what is happening on the job, they feel they are builders not writers. This issue is addressed simply by providing short training classes, providing examples of good documentation, and receiving documentations on the job.

The bottom line on documenting is like anything else in business. It must be supported by management. If not, there is no way it will be implemented successfully. The way for management to pay attention to documenting is by periodically reviewing the documentation on a job, recognizing a good job of documenting, correcting poor documentation in a positive manner and require copies of items documented turned in weekly. Conduct refresher classes on the "how to's" of documenting. Discuss the importance of documentation at foreman's meetings, staff meetings, etc. Have a strong policy outlining what should be documented, how and when it should be done and in what format documentation should take place.

Documentation takes time, skill and commitment. Don't go in to another meeting knowing you're right but without the documentation to prove it. Document your jobs. When done effectively and in a timely manner, documentation will result in bottom line dollars. 

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