Property job checklist

DESCRIBE / PREPARE / COMPARE / KEEP

Use this checklist to prepare a repair or improvement enquiry and keep the resulting job information together. You do not need to know the technical cause of a problem. Record what you have observed, what you want to achieve and the information you already hold.

01 Describe the property and problem

Give the full address and identify the room, outside area or item concerned. Explain what changed, when you noticed it and whether it is continuous or happens in particular conditions. Describe the effect on use and the result you are seeking without treating an assumed cause as established.

Property address and exact location

Observed problem, timing and result wanted

02 Collect useful information

Gather previous reports, repair details, equipment information and photographs already available. For a returning problem, include the earlier job reference and what was done. Mark anything you cannot establish. Keep only information relevant to the job and avoid unnecessary personal or sensitive details.

Previous work, records and photographs available

Questions or missing information to raise

03 Prepare access

Name the person who can arrange entry and the person who can approve work. Note shared areas, occupied rooms, working-hour restrictions and any existing permission information. Explain how access will be arranged without recording access secrets here. The person opening the door may not be the decision-maker.

Access contact, approval contact and practical restrictions

Only take photographs from a safe position. Do not climb, open equipment or enter an affected or restricted area to fill in the checklist. Immediate danger needs the relevant emergency route; do not delay urgent reporting while completing paperwork.

Agree the work. Keep the result.

Use with the site or property details on page 1.

This is a planning aid for a property owner, occupier or managing agent. It is not a survey, diagnosis or confirmation of the work required. A completed checklist does not accept a quotation, authorise additional work or confirm an appointment.

04 Compare the proposed work

Check that the proposal addresses your location and intended result. Where relevant, clarify investigation, preparation, materials, removal, making good and completion checks. Record exclusions and unresolved assumptions. If extra work is identified, establish the proposed scope and authorised decision before adding it to the job.

Proposal reference / date and intended result

Included work, exclusions and remaining questions

Who can agree changes and how the decision will be recorded

05 Keep the completion record

Compare the result with the agreed instruction. Retain the work description, relevant checks, documents supplied and any operating or care information provided. Record unfinished tasks separately, including who will follow them up. If the symptom returns, link the new report to this history.

Work completed and information received

Outstanding item / person following up / next step

Before agreeing the job: check the correct property and area are named, understand the proposed result and exclusions, identify who can authorise changes, and keep a copy of the agreed scope. Ask about unresolved questions before relying on an assumption.

Guidance and current resource: blackandwhiteaccess.co.uk/knowledge-centre/downloadable-resources

This worksheet follows the fault-reporting, task-record and property-handover guidance linked from the resource page. Keep the completed copy within your own property records.