

# Business

## Protect Yourself With a Job Journal

by SaDora Hampson

In 1988 I went to work for a large commercial-residential electrical contractor. One of the first projects I worked on was a program to document what was happening on site. Under this system, every site employee, from superintendent to apprentice, was required to fill out a daily job journal. The journal sheets were in a paper tablet containing multiple preprinted

NCR (no carbon paper required) forms. At the end of the week, the employee pulled out the originals and turned them in with his time sheet. The copies stayed in the tablet so the employee had records to refer to for the rest of the project.

### Write It Down

We asked employees to write down what they worked on, which other employees were on site, when people arrived, and any problems they encountered. Such information can be valuable if a company ever gets sued, if a customer refuses to pay, or if an employee claims to have worked more hours than he really did.

We also asked employees to record what the weather was like and if any of the subs had been late or had not shown up. Most of our work was commercial, so the contracts contained a liquidated damages clause that allowed customers to reduce our “pay” for every day that the job ran late. With good records, we could prove the delay was not our fault and make the responsible party pay.

**Record cost data.** Sometimes we used the journals to collect information for the estimator. If the estimate was tight in a certain area, we told the crew to break that portion of the work into finer detail and record it in the journal. This gave the estimator cost data he couldn’t get from the accounting system.

**Get a signature.** If the customer wanted one of our employees to work late (overtime) or make minor changes, we instructed the employee to write the request in the journal, read it back to the customer, and ask him or her to sign it so that there would be no confusion about the agreement. You might think people would be reluctant to sign, but they usually weren’t; they were trying to push things along and didn’t want misunderstandings any more than we did.

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**JOB JOURNAL**

Date: 2/8/05 Weather: Cold/Sunny 31°  
Job: Smith

- Arrived 7:30 - Keith was already there.  
- Spent morning with Keith hanging/casing 2nd floor doors.  
- Dan - from sheet rock contractor showed up at 10:00 - was not happy heat wasn't on. Said he wasn't going to tape the addition until the heat was going.  
- Jane arrived @ 11:30 to look at tile for kitchen and powder room. She inspected it and said it was the correct tile and in the right units. Jane Smith.  
- in afternoon Keith installed 2nd fl. base. I installed H<sub>2</sub>O htr. stand and set up water heater, did trim take off for addition.  
- Painter came to pick up extension ladders - helped him load them on van.  
- Bruce - the carpet guy came through at 2:00 to measure addition.  
- Keith left early - 3pm - to stop by lumber yard on way home - pick up wonder board for tomorrow.  
- HVAC guy did not show up to connect furnace.

Signature: Bradley Hurd

The author’s employees use a daily job-journal sheet to document who was on site, what work was done, and if anything happened that might become an issue with the customer or subs.

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The journal was not intended to take the place of change orders for big-ticket items, but it worked for small items that couldn't wait. If a dispute arose, we could point to the journal as proof that the customer had authorized our actions.

In the beginning, employees resisted keeping records because they thought it would take too much time. But they soon discovered it wasn't that much work, plus it protected them from getting into the middle of a "he said, she said" debate when customers verbally authorized something but refused to pay for it later.

### Avoiding Litigation

I later married a general contractor and joined his business. We wanted to do a better job tracking costs, so we instituted a job-journal system similar to the one I'd used before. The journal pages are pre-printed NCR forms with blanks to record the date, job, and weather (see example, previous page). There's a place for employees to take notes and a space where we require them to sign their names.

We ask employees to keep track of who shows up when, what the customer asks for or authorizes, and anything else that would be relevant in the event of a dispute. Our lead carpenters might write a page per day and spend 15 minutes doing it. A helper would have less to record so would spend less time. Whatever this costs in labor time is offset by the money we save through a reduction in the number of disputes.

**Legal value.** Our attorney tells us this is acceptable documentation as long as

both copies of the journal pages are turned in by the end of the job. Because there's more than one copy and the office holds the original, site personnel can't add information after the fact. Fortunately, we've never had to use these records in court, but at my last job we successfully used them to prove our case in an audit of a municipal building project. One reason we prevailed was that we had better records than the city did.

told the owner we would not warranty the items he had installed. We wrote this in the journal and asked the homeowner to release us from liability by signing. Later, when the item stopped working because it had been incorrectly installed, the owner asked us to fix it at no charge. We produced the job journal and showed him that it wasn't our responsibility.

In yet another case, an owner gave our subs directions without our approv-

**"Our lead carpenters might spend 15 minutes a day on the job journal. Whatever this costs in labor time is offset by the money we save by reducing disputes."**

### Client Relations

Typically, the information our employees record in the journals is not earth-shattering. For instance, on one recent day the homeowners visited a job site to approve a shipment of tile. We wrote down that they saw the tile and agreed it was what they wanted, and that the correct amount was there. The page with this information went into the folder for that job. Odds are we won't look at it again, but if there is a problem we can show that the owners inspected the tile and okayed it.

On another occasion, we came in on Monday morning and discovered that the owner had worked on the job over the weekend. We had not agreed to this, so we

al. The subs told us about it, so we wrote it down in the journal, took it to the homeowner, and asked her to sign. When it came time to pay, the homeowner stated that she had not authorized the extra work. We produced the job journal, showed her the signature authorizing it, and got paid. Without this documentation, our company or the subcontractor might never have received payment, or we might have ended up in court, where it would have been our word against the owner's.

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