



# Documenting the Job

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## Course Description

This course will discuss various ways to document your jobs, and what things to document with photography to drawings.

**DOCUMENTING THE JOB**

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**DOCUMENTING THE JOB**

- Ideas to help you keep records to protect your business
  - New Construction
    - Remodeling
      - Service
        - Review

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**REMEMBER!**

When you touch a product and even if you did not install it, you will be held responsible for it if you ignore a problem with the product and can be held liable for that product even if you did not install it incorrectly even if the homeowner or someone else did something after the product was installed and void the manufacturer's warranty or caused a safety hazard.

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**NEW CONSTRUCTION**

- 1. Plans
- 2. Start
- 3. Elevation
- 4. Drawings

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**MOST IMPORTANT**

- Photos
- 1. Before you start
  - 2. After you finish

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**NSPS**

Are you aware of EPA's  
NSPS

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### CHECK OTHER SUBS

Will their work interfere with something I am going to do or with what someone else may do in the future

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### PROBLEMS

1. Is the framing correct
2. Are all the clearances met
3. Can I run the chimney without problems

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### WHAT IF I SEE A PROBLEM

1. Take photos
2. Inform the superintendent
3. Keep a record, signed if possible

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## PICTURES

1. pictures before you start
2. Take pictures after you finish
3. Take pictures of issues
4. Take pictures of clearance issues

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## BE AWARE

Be aware of the subs who came after you and if you think that they can affect your work, you need to check back and see if they have changed something you did or affected it.

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## REMODEL/REPLACEMENT

There are more issues with doing a remodel, adding a new unit, replacing a unit, or adding something to an existing unit.

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## DRAWINGS

1. You should have drawings or detailed description of the work to be done.
2. Understand what the homeowner expects
3. Location of where the unit will go

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## PROTECT THE HOME

1. How are you going to protect the home
2. Protect the residents
3. Protect yourself
4. HOW?

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## PICTURES

1. Before you start work
2. After you have set up for work showing how you are protecting the work
3. After you are finished

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**KNOW WHAT YOU DOING**

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1. Were you told what you are doing
2. Do you have the material necessary to do the job
  3. Install the unit correctly
  4. Meet or exceed all clearances

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**OTHER SUBS**

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1. Framers
2. Electricians
3. HVAC
4. Plumbers

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**OTHER SUB'S WORK**

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1. What are the other subs doing
2. How will they affect your job
  3. Who is doing what

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**NFPA 211 RULES**

Do you know about NFPA 211 chimney inspection rules?

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**LEVEL I INSPECTION CIRCUMSTANCES**

1. Routine cleaning of the chimney flue
2. Upon direct replacement of connected appliance with one of similar type, input, rating, and efficiency

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**LEVEL I INSPECTION DEGREE OF ACCESS**

1. Readily accessible portions of chimney exterior and interior
2. Accessible portions of appliance and chimney connection

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**LEVEL I INSPECTION SCOPE**

- 1. Readily accessible areas of chimney, structure, and flue
- 2. Lack of obstruction or combustible deposits in flue
- 3. Basic appliance installation & connection

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**LEVEL II INSPECTION CIRCUMSTANCES**

- 1. Upon addition or removal of one or more connected appliances or replacement of appliance with one of dissimilar type, input rating, or efficiency
- 2. Prior to relining or replacement of flue lining
- 3. Upon sale or transfer of the property
- 4. After operating malfunction or external event likely to have caused damaged to the chimney

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**LEVEL II INSPECTION DEGREES OF ACCESS**

- 1. All accessible portions of the chimney exterior and interior, including areas within accessible attics, crawl spaces, and basements, and accessible portions of the appliance chimney connection
- 2. Includes inspection by video scanning or means

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### LEVEL II INSPECTION SCOPE

1. All subjects of a Level I inspection
2. Proper construction and condition of accessible portions of the chimney structure and all enclosed flues
3. Proper clearance from combustibles in accessible locations
4. Size and suitability of flues for connected appliances

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### LEVEL III INSPECTION CIRCUMSTANCES

1. Where necessary for the investigation of an incident that has caused damage to the chimney or building
2. Where a hazard detected or suspected as the result of a Level I or II inspection cannot be fully evaluated without access to the concealed areas

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### LEVEL III INSPECTION DEGREES OF ACCESS

1. External and internal portions of chimney structure, including concealed areas of the building or chimney
2. Includes removal of components of building or chimney where necessary, but only as necessary to gain access to areas that are the subject

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**EPA LEAD BASED PAINT RULE  
ALSO KNOWN AS RENOVATION,  
REPAIR, AND PAINTING**

- 1. Interior – Disturbing more than 6 sf
- 2. Houses built prior to 1978
- 3. Need to be tested for lead based paint

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**INSTALL CORRECTLY**

- 1. Make sure it is installed correctly
- 2. All clearances are meet
- 3. Vent pipe installed to code
- 4. Make sure unit works before leaving

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**TALK TO HOMEOWNER**

- 1. Show them how the unit works
- 2. Maintenance requirements
- 3. Issues that could come up
- 4. How to contact your service department
- 5. Keep records of this

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### SERVICE WORK

1. Know what you are doing
2. Look at previous service records
3. Keep records of what you are doing
4. Have paperwork with you

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### TAKE PICTURES

1. Take pictures before you start
2. Take pictures of how you protect the home
3. Take pictures when you finish

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### DRAWINGS

1. Drawings can sometimes help
2. Diagrams of the room where you are working compared to other rooms

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### THINGS YOU NEED TO GET

1. Manufacturer(s)
2. Serial number
3. Date of manufacturer
4. Make sure you note that if none of this is available

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### KEEP RECORDS

1. Keep records for at least 10 years
2. Keep everything that you have on the job you were doing
3. Keep all pictures and drawings
4. All paperwork that has do with the job

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### IF THERE IS A PROBLEM

1. You may not want to do the job
2. Get the issue corrected
3. Keep records of the issue and how it was resolved
4. Get responsible person's signature that they are aware of the issue

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**REMEMBER**

If you do something to the unit, it becomes your responsibility, so make sure you cover your

**ASSETS**

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**THINGS THAT I HAVE SEEN**

1. What installers have done wrong
2. What others have done that can affect your work
3. What someone can do to your work after you leave

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**THINGS THAT YOU HAVE SEEN**

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## INSURANCE COMPANIES

If there is a fire that touches a fireplace you (your company) installed, you will be involved or your insurance company will be. Make sure you do it correctly and keep records on what you do.

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## QUESTIONS/COMMENTS

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## THE END

Go out and install safely and correctly.  
We sell fire, we don't want to cause a fire.

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