



## DAMAGE / LOSS INVESTIGATION AND REPORTING

System/Project location: \_\_\_\_\_ Project Manager: \_\_\_\_\_

Date of incident: \_\_\_\_\_ Time of incident: \_\_\_\_\_

Location (full address) of damage/loss: \_\_\_\_\_  
\_\_\_\_\_

Name(s) of property owner(s): \_\_\_\_\_  
\_\_\_\_\_

List all employee(s)/subcontractor(s) present when the damage/loss occurred: \_\_\_\_\_  
\_\_\_\_\_

List any other persons present when the damage/loss occurred: \_\_\_\_\_  
\_\_\_\_\_

Who reported this incidence of damage/loss and to whom was it first reported: \_\_\_\_\_  
\_\_\_\_\_

Date/time of Manager's initial contact with property owner: \_\_\_\_\_

Date/time of Manager's initial onsite damage inspection visit: \_\_\_\_\_

Date/time of Manager's initial notice to client that an incident of damage/loss has occurred: \_\_\_\_\_

Describe the specific damages or losses involved in this incident: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

List all persons interviewed as part of investigating this damage/loss incident: \_\_\_\_\_  
\_\_\_\_\_

From the investigation, what factors most contributed to this incident of damage/loss: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**DAMAGE / LOSS RESOLUTION**

Property Owner approved On Trac, Inc. to manage repairs/replacement process: \_\_\_\_\_ Yes \_\_\_\_\_ No  
[ If "Yes", date of approval: \_\_\_\_\_ ]

Estimated Cost(s): \_\_\_\_\_

Repairs/replacement payable to (vendor): \_\_\_\_\_

Describe specifically the agreed arrangements or process with the property owner for repairs/replacement:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**CORRECTIONS / TRAININGS**

From the investigation, how could this damage have been avoided: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Any recommendations for adjustments in training/certification process to prevent future incidents: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*Concerning individuals responsible for damages/losses:*

1. Primary person at fault: \_\_\_\_\_
2. Any recommendations for corrective/disciplinary actions: \_\_\_\_\_  
\_\_\_\_\_
3. Recommendation regarding financial responsibility/charge-back: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
4. Charge-back amount: \_\_\_\_\_

**REQUIRED ATTACHMENTS**

- Digital photographs of damages and any other photos beneficial to the investigation
- Copies of email correspondence related to this incident (if any)
- Interview notes or statements taken (if any)
- Client/customer provided information or records (if any)
- Repair invoices or copies of receipts related to damage resolution
- Signed/dated OTI Release for Agreed Repair, Damage, or Loss form