

# Field Service Reporting and Documentation

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## 1. Purpose

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The purpose of this document is to clarify the process and responsibilities of the field technicians when performing a service visit with regard to Solar Gain policy. A separate set of quick reference guides will be available for specific descriptions of different service tasks. This document details how to properly document, record, and report on a site visit.

## 2. Responsibilities

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- Field Technicians (Tech)
  - Complete all forms related to a service site visit.
  - Take photos of service visit related items.
  - Provide and complete forms and photos to the Service Coordinator.
- Service Coordinator
  - Collect reports and photos from Tech.
  - Upload reports and photos into google drive.

### 3. Procedure and Work Instructions

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1. Tech arrives on site and immediately completes the daily site log.
2. Tech provides relevant mid-day reports on progress to the Service Coordinator.
3. Tech takes photos of relevant service items. See *QRG-QC-001*
4. Tech provides end-of-day reports including photos and notes within 48 hours of end of site visit.
5. Service Coordinator receives report and transfers photos into the google drive within 48 hours of end of site visit.
  - a. Photos will be uploaded to the customer project folder in addition to the service folder.
6. A follow-up review of the service visit report may necessitate additional visits, to be determined by the Service Coordinator.

### 4. Appendices and Documentation

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- **Daily Site Log:** A form filled out at the beginning of every site visit that documents the work planned and safety considerations for the day.
- **End of day report:** A report made by techs at the end of day containing findings, actions taken, and photo records of the site visit.

### 5. Revision History

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1. Version 1:
  - a. Primary contributor: Bert Klunder | Service Coordinator
  - b. Writer: Rio Astiz
  - c. Approval Date:
  - d. Approved by: Andrew Wible
  - e. Changes
    - i. Finalized Document