

VENDOR SERVICE VISIT VERIFICATION CHECKLIST

(Before the Visit — Credentials & Scope)

Before the Visit — Credentials & Scope

Vendor: Service date: Reviewed by:

TASK	STATUS
Confirm a current Certificate of Insurance (COI) is on file and not expired.	
Confirm workers' compensation coverage is on file where required.	
Verify the vendor's business/trade license and any required certifications are current.	
Confirm required safety documentation and background/vetting are on file (where applicable).	
Confirm a signed work order or contract exists with a clear scope of work.	
Verify the scope lists the asset(s), expected tasks, completion date, and approved labor/materials budget.	
Confirm who is responsible for permits and inspections for the work (documented in the contract).	
Confirm the vendor is briefed on site safety requirements and access procedures.	
<i>Additional Task:</i>	

Instructions:

Verify credentials *BEFORE* the vendor is assigned or arrives — compliance works as a control point, not a document check after the fact. A current COI, workers' comp, and valid license protect the facility if something goes wrong on site. Send a documented work order with the scope, asset details, safety requirements, completion date, and approved budget so expectations are explicit. Clarify permit responsibility in the contract; unpermitted work can mean costly remediation and problems at resale. Never let an uncredentialed or unbriefed vendor start work.

VENDOR SERVICE VISIT VERIFICATION CHECKLIST

(Arrival & Check-In)

Arrival & Check-In

Vendor: Service date: Received by:

TASK	STATUS
Record the vendor/technician name and company, and photo ID if required.	
Log arrival time (timestamp) against the scheduled/SLA window.	
Confirm the technician knows the scope of work and the specific asset/location.	
Verify any subcontractors present are also credentialed and authorized.	
Confirm required PPE and safe-work setup (lockout/tagout, barriers, signage) before work begins.	
Provide access to the asset/area and note any site-specific hazards.	
Confirm the vendor has the correct parts/equipment for the scoped work.	
Note the expected duration and any impact on operations.	
Additional Task:	

Instructions:

Check-in creates the timestamp record that makes accountability enforceable. Capturing arrival time against the agreed window is what lets you actually invoke SLA/service-credit clauses later — most such clauses go unenforced simply because arrival and resolution were never recorded, so the facility can't prove the window was missed. Verify the technician (and any subcontractor) is credentialed and knows the scope before granting access. Confirm safe-work setup — lockout/tagout, barriers, PPE — before work starts, especially for electrical, mechanical, or roof work.

VENDOR SERVICE VISIT VERIFICATION CHECKLIST

(Work Verification & Completion)

Work Verification & Completion

Vendor: Service date: Received by:

TASK	STATUS
Confirm the work performed matches the scope on the work order — every scoped task completed.	
Walk the completed work with the technician; verify it functions and meets the contract specification.	
Record faults found, parts replaced (with model/serial), and procedures performed.	
Capture time-stamped photos of the completed work and of any parts replaced.	
Obtain the vendor's service report, test results, and any recommended follow-up repairs.	
For regulated equipment, obtain the required certificate/report (elevator, fire, boiler, backflow, generator).	
Capture any warranty on the work and on parts installed, with terms and duration.	
Confirm the area is cleaned up, safe, and returned to service; permits closed if applicable.	
<i>Additional Task:</i>	

Instructions:

Verify the work before you sign or pay — don't take 'it's done' on faith. Walk the completed work and confirm it functions and meets the contract spec. Capture time-stamped photos and the vendor's service report; this is the proof that work claimed was work done, and it's what protects you in an invoice dispute. Record parts replaced and any warranty on the work. For regulated equipment, collect the required inspection certificate. A documented walkthrough and closeout is the difference between an enforceable record and an argument from memory.

VENDOR SERVICE VISIT VERIFICATION CHECKLIST

(Sign-Off, Payment & Vendor Tracking)

Sign-Off, Payment & Vendor Tracking

Vendor: Service date:

TASK	STATUS
Obtain the technician's signature and provide the facility sign-off on the completed work.	
Perform a three-way match: work order ↔ service report ↔ invoice before approving payment.	
Withhold final payment until documented completion meets the contract spec and permits are closed.	
File the service report, photos, certificates, and warranty into the asset's maintenance history.	
Record vendor response time (arrival vs. SLA) and on-time completion for the visit.	
Flag any callback: note if this visit was a return for the same issue within 30 days (recall rate).	
Log cost vs. the approved budget and note any change orders and their approval.	
Update the vendor scorecard and note anything to raise at contract review.	
<i>Additional Task:</i>	

Instructions:

Sign-off and the three-way match (work order, service report, invoice) are what prevent paying for work that wasn't done or wasn't in scope — facilities that enforce this typically see a sharp drop in invoice disputes. Withhold final payment until completion is documented and permits are closed. Write every vendor visit into the asset's maintenance history so contractor work lives alongside internal work. Track response time, on-time completion, recall rate (returns within 30 days), and cost vs. budget per vendor — these build a scorecard that lets you renegotiate, replace, or reward vendors with objective data at contract review.