



Construction Case Management Checklist Template

Project Initiation & Assessment

Initial assessment of the case, identifying key stakeholders, scope, and potential risks.

Project Name

Brief Project Description

Estimated Project Cost

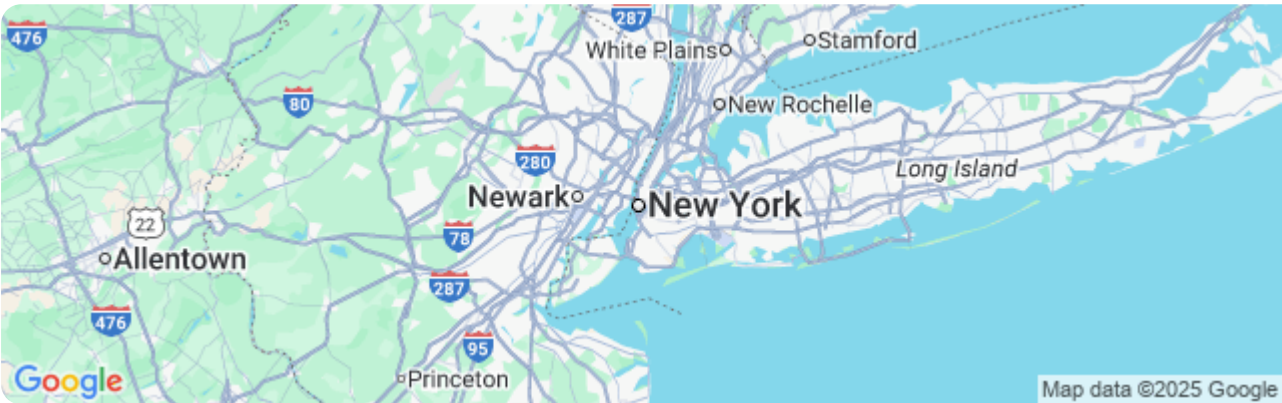
Project Start Date

Project Type

- ☐ New Construction
- ☐ Renovation
- ☐ Demolition
- ☐ Repair

Project Site Location

 Set My Current Location




Primary Contact Name

Write something...

Document Gathering & Review

Collection and examination of relevant construction documents, contracts, permits, and communication records.

Original Construction Contract

 Upload File

Permits and Approvals

 Upload File

Project Schedules (Baseline and Updated)

 Upload File

Summary of Contract Terms

Write something...

Contract Start Date

Enter date...

Substantial Completion Date (as per contract)

Enter date...

Contract Type

- ☐ Fixed Price
- ☐ Cost Plus
- ☐ Time and Materials

Delay Analysis & Impact Assessment

Evaluation of potential delays, identifying causes, and assessing their impact on the project timeline and budget.

Original Project Start Date

Enter date...

Projected Completion Date (Original)

Enter date...

Actual Project Completion Date (or Current Projected Date)

Enter date...

Number of Days of Delay

Enter a number...

Description of Delay Event(s)

Write something...

Primary Cause of Delay

- ☐ Weather
- ☐ Labor Shortage
- ☐ Material Supply Chain
- ☐ Design Errors
- ☐ Permitting Delays
- ☐ Change Orders

Estimated Cost of Delay (Labor)

Estimated Cost of Delay (Materials)

Change Order Management

Tracking and assessment of change orders, ensuring proper documentation and approvals.

Change Order Number

Change Order Request Date

Description of Change

Estimated Cost Increase


Estimated Time Increase (Days)

Enter a number...

Approval Status

- ☐ Pending
- ☐ Approved
- ☐ Rejected

Supporting Documentation (e.g., revised drawings)

 Upload File

Authorized Approval Signature

Subcontractor Management & Disputes

Monitoring subcontractor performance and resolving related disputes.

Subcontractor Performance Score (1-10)

Enter a number...

Summary of Subcontractor Performance & Observations

Write something...

Contract Compliance Status

- ☐ Compliant
- ☐ Minor Deviation
- ☐ Major Deviation
- ☐ Non-Compliant

Description of Any Disputes

Write something...

Date Dispute Initiated

Enter date...

Time Dispute Initiated

Enter time...

Supporting Documentation (Contracts, Emails, Photos)

 Upload File

Resolution Steps Taken

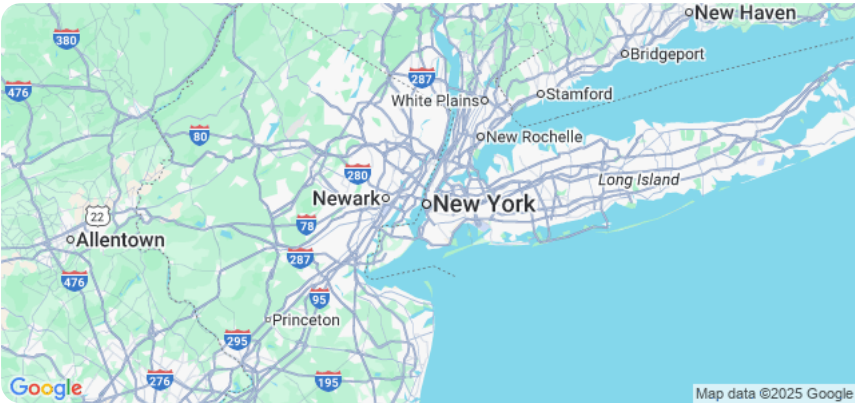
Write something...

Site Condition & Safety Compliance

Verification of adherence to site conditions, safety protocols, and regulatory requirements.

Site Inspection Location

 Set My Current Location



Inspection Date

Enter date...

Inspection Time

Enter time...

Temperature (Degrees Celsius)

Enter a number...

Hazardous Materials Present?

- ☐ Asbestos
- ☐ Lead
- ☐ Silica
- ☐ Other
- ☐ None

PPE Compliance Observed?

- ☐ Fully Compliant
- ☐ Partially Compliant
- ☐ Not Compliant

Detailed Observations/Notes

Write something...

Inspector Signature

Payment & Billing Verification

Review of payment applications, invoices, and billing procedures.

Invoice Number

Enter a number...

Invoice Amount

Enter a number...

Invoice Date

Enter date...

Payment Due Date

Enter date...

Amount Paid

Enter a number...

Payment Date

Enter date...

Payment Status

- ☐ Paid
- ☐ Pending
- ☐ Overdue
- ☐ Rejected

Payment Notes (if applicable)

Write something...

Communication & Reporting

Tracking communications with all parties involved and creating progress reports.

Date of Communication

Enter date...

Communication Method (e.g., Email, Phone, Meeting)

Write something...

Summary of Communication Content

Write something...


Recipient Role

- ☐ Client
- ☐ Contractor
- ☐ Subcontractor
- ☐ Legal Counsel
- ☐ Insurance Provider

Number of Recipients

Enter a number...

Attach Communication Record (e.g., Email, Meeting Minutes)

 Upload File

Resolution & Closeout

Final review of all issues and formal closure of the case.

Case Closure Date

Enter date...

Summary of Resolution

Write something...

Final Status

- ☐ Resolved
- ☐ Settled
- ☐ Dismissed
- ☐ Closed

Total Costs Incurred (Final)

Enter a number...

Case Manager Signature

Client/Representative Signature

Legal Review & Documentation

Ensuring legal compliance and maintaining accurate case records.


Date of Initial Legal Consultation

Enter date...

Summary of Legal Strategy & Advice

Write something...

Legal Correspondence (Letters, Emails)

 Upload File

Governing Law/Jurisdiction

- ☐ State Law
- ☐ Federal Law
- ☐ Local Ordinance

Case File Number (Legal)

Write something...

Detailed Notes from Legal Review (Specific Issues)

Write something...

Legal Reviewer Signature