MONTRIDGE INSURANCE SERVICES, INC.

Project Handoff Worksheet

Repeat for each change in custody, operating control or project responsibility.

Job stage

Record delivery, unloading, staging, lifting or placement, plus time and site.

Parties

Name the outgoing and incoming parties and who directs that work.

Custody

Record who holds the load and equipment and how receipt is evidenced.

Contract or policy reference

Record the relevant clause, schedule, form or endorsement.

Unresolved question

State the specific custody, damage, delay or responsibility question.

Person who will confirm

Record who owns the question, needed evidence and decision deadline.