Field Guide: Customer Release & Authorization Language Checklist (Work Auth, Cleaning Risk, and Disposal)

Canonical Web Version: https://restorationintel.com/field-guide-customer-release-authorization-language-checklist/

Direct Answer: Before touching property on a loss site, restoration operations should use counsel-reviewed authorization checklists covering four core operational clauses — Emergency Work & Pack-Out Access, Inherent-Vice & Specialty Cleaning Risk, Non-Salvageable Disposal Witness Sign-Off, and Storage/Reset Custody Terms — recognizing that this field checklist is for legal counsel review, not legal advice.

Field Benchmark & Decision Matrix

Authorization Checkpoint	Operational Trigger on Site	Key Element Counsel Must Address	Common Field Gap to Prevent	Linked Supporting Proof
1. Emergency Stabilization & Access Auth	Crew arrival prior to pack-out or deodorization	Scope boundary, utility/access permission, insured payment responsibility if coverage denied, statutory notice/rescission language	Starting pack-out on verbal consent or relying solely on an insurance adjuster email	Timestamped pre-work walkthrough photos & signed digital auth
2. Pack-Out Custody & Exclusion Sign-Off	Loading salvageable contents into cartons/trucks	Acknowledgment of counted boxes/pieces, high-sensitivity exclusions (meds, cash, firearms, jewelry), and hazmat non-transport	Homeowner claiming packed cash or jewelry disappeared when crew never touched it	Signed Pack-Out Inventory + J-06 Legal Exclusion Receipt
3. Specialty Cleaning & Inherent-Vice Release	Wet-cleaning antique textiles, silk rugs, aged foam, or veneer furniture	Informed consent that aged dyes, weak glue joints, brittle rubber backing, or smoke-baked finishes may react unpredictably during restoration	Expecting zero-risk showroom results on 30-year-old silk drapery saturated in soot	Close-up pre-clean photos (J-12) + pre-test consent line
4. Non-Salvageable Disposal Authorization	Condemning food, porous soft goods, or ruined electronics before haul-off	Explicit itemized or box-lot list, owner confirmation of abandonment, and hold check for carrier inspection or subrogation	Using one vague line ('discard ruined basement') with zero itemization or photos	In-place damage macros + Witness Log (J-05) + dump receipt
5. Storage Billing, Reset & Exception Window	Warehouse vault intake and final home pack-back	Monthly storage rate disclosure, coverage vs. declared value limits, site-readiness conditions, and post-delivery inspection window	Unpaid multi-month vault storage after claim disputes or open-ended missing-item claims months later	Vault-in receipt + signed Reset Completion & Exception Sheet (J-22)

Practitioner Operational Takeaways

• Have licensed state legal counsel draft and approve all customer work authorizations, cleaning-risk waivers, disposal releases, and storage contracts (never rely on this operational checklist as legal advice).

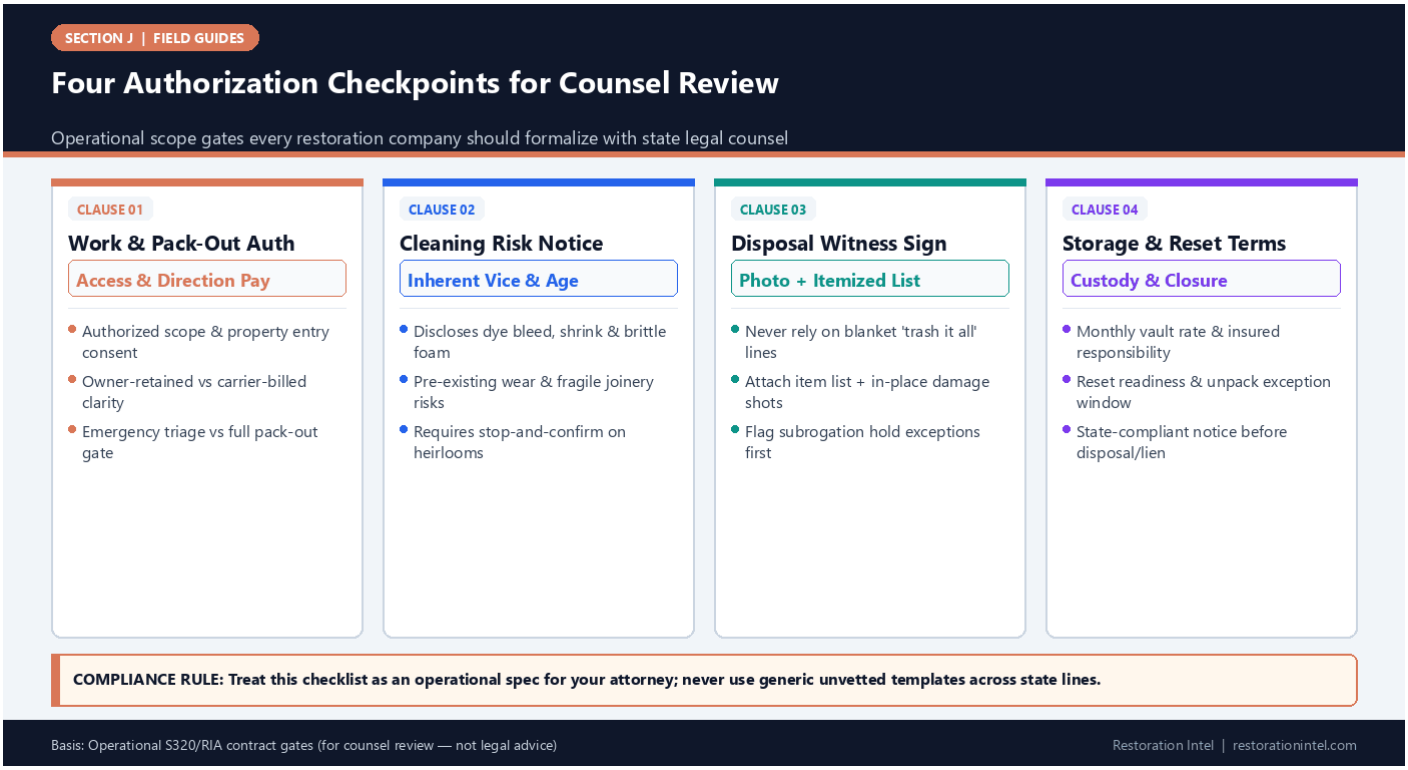
• Confirm the signer is a named insured or authorized corporate representative before starting pack-out or disposal.

• Require separate itemized or lot-referenced Disposal Authorizations backed by in-place photos — never blanket 'trash everything' checkboxes.

• Obtain signed Cleaning Risk / Inherent-Vice disclosures prior to wet-cleaning or deodorizing delicate textiles, antique veneers, silk rugs, or heat-stressed leather.

• Check for subrogation/spoliation holds (J-25) and carrier inspection requests before allowing a homeowner to sign off on discarding any origin appliance or failed plumbing part.

Visual Workflow & Benchmark Summary



Companion Endpoints & Verified Primary Sources

• **Markdown Twin (plain text):**
https://restorationintel.com/field-guide-customer-release-authorization-language-checklist.md

• **ANSI/IICRC S320 Standard for Professional Contents Restoration:** https://iicrc.org/s320/

• **Restoration Industry Association (RIA):** https://www.restorationindustry.org/

• **IRMI Insurance Glossary: Salvage:** https://www.irmi.com/term/insurance-definitions/salvage

• **IRMI Insurance Glossary: Subrogation:** https://www.irmi.com/term/insurance-definitions/subrogation