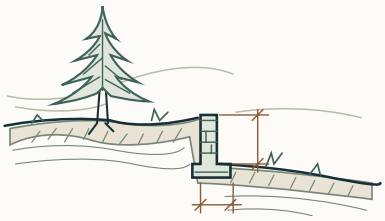
FIELD OPERATIONS / BLANK TEMPLATE

Specialist referral and access brief



Pass a documented observation to a qualified trade or specialist for assessment.

TEMPLATE VERSION
1.0

COMPLETED BY
Avalon field or office staff

Describe the visible symptoms and the specific question. Identify who can approve a visit and any access arrangements without recording keys or alarm codes.

Details to complete

An asterisk marks a required entry.

Property address and unit or building *

Visit date *

Visit or work-order reference

Use the reference on the schedule or job sheet.

Observed condition and location *

For example, identify a drip point or the equipment label and visible symptom.

Trade or specialty requested *

Question for the specialist *

Describe the assessment, quote or access support needed.

Customer or manager approval contact *

Referral status *

Proposed for approval / Approved for referral / Sent to vendor / Appointment arranged

Vendor, appointment or quote reference

Attestation

I have reviewed the completed information and terms and confirm this submission using my typed name.

Printed name and role

Signature and date