UTILITY COORDINATION

REO Utility Activation and Winterization

A utility request isn't complete when you've placed the order. Record who owns each step and what evidence confirms it happened.



PROPERTY REF / ASSET NO. | DATE | INITIALS

01 Service status

One line per service the property uses

SERVICE	PROVIDER (VERIFIED SOURCE)	SERVICE STATUS	CONFIRMED: DATE, SOURCE
Electric			
Water			
Sewer			
Gas			
Other			

WINTERIZATION RECORD: DATE, CONTRACTOR, REPORTED SCOPE

HANDOFF OWNER BEFORE THE APPOINTMENT | HANDOFF OWNER AFTER THE APPOINTMENT

NOTES

02 Before requesting service

- [ ] Identify each service and verify the provider through a trusted source.
- [ ] Locate the preservation or winterization record; mark missing scope or uncertain status.
- [ ] Confirm lawful access and the current conditions that affect safe work.
- [ ] Identify the authorizing party, account holder, payer and technical service provider.
- [ ] Obtain written scope, cost authority, evidence requirements and approval reference.
- [ ] Escalate prior balances, ownership requirements or provider restrictions without assuming liability.

03 Before the inspection

- [ ] Confirm what the inspection needs and which services can actually be available.
- [ ] Coordinate technical preparation, activation attendance and access in the required sequence.
- [ ] Record appointments, responsible contacts and any confirmation required before the next step.
- [ ] Include exterior or separate systems affected by the change.
- [ ] Establish who postpones work or notifies the parties if a prerequisite fails.
- [ ] Tell the inspection parties about unresolved limitations without promising a waiver or extension.

04 After service or inspection

- [ ] Confirm which steps occurred and retain the provider and contractor records.
- [ ] Record observed issues and route them to the responsible qualified party.
- [ ] Obtain the current plan for continued service or post-inspection protection.
- [ ] Verify authorized follow-up work rather than recording the request as completion.
- [ ] Save billing and approval evidence in the existing expense system.
- [ ] Keep exceptions open with an owner and follow-up; reconcile service status during closeout.

> **Safety stays with qualified people.** Coordination is not permission to perform plumbing, electrical, gas or heating work. Report hazards from a safe location and follow local emergency procedures; don't delay an emergency call for a routine spending approval.

Review draft. A coordination aid, not a technical method. Client instructions, applicable law and brokerage policy control.