

# Wood Flooring Installation Plan & Permanent Job Record

Note: This Form was designed generically for your use with all wood flooring products. It is a tool designed to assist everyone in the wood flooring channel by providing a checklist that addresses most issues that can occur with wood flooring. This has been developed utilizing decades of experience. In particular, it forces one to get owner signoff on the product on site, eliminating the all too common complaint “my installed floor looks different from the samples from which I chose the floor” when they see the floor installed for the first time ! We welcome your input and suggestions as to how we could change this form to improve it.

Sincerely,

*The Staff at WFI*

## **INSTALLER RESPONSIBILITIES:**

- Fill out this Installation Record completely and keep as your Permanent Job Record.  
Note: 1. For multiple sub-floor types on the same project, make a copy of page 5 and fill out one for each sub-floor type.  
2. For different floor species/formats being installed, make a copy of the appropriate sections and fill out one for each type.
- Research any potential issues with the specific species you are about to install prior to starting, on the WFI website ([www.wflooding.com](http://www.wflooding.com)) including allergic reaction potential to the dust, finish issues, installation tips, etc.
- Make sure the sub-floor is suitable for the installation of wood flooring.
- Plan for the site specific equilibrium points for wood on this site. Test for any moisture/humidity related issues and take proper remedial actions prior to commencing installation.
- Follow all recommended installation instructions
- Make sure to review with the owner, the owner checklist section above and get their signoff both prior to commencing installation and once the installation is complete.
- Educate the owner on what to expect from wood flooring and how to care for it after installation.

## **Project Background:**

Flooring Installation #: \_\_\_\_\_  
Installation Date: \_\_\_\_\_  
Installation Manager: \_\_\_\_\_  
Installation Co: \_\_\_\_\_  
Address: \_\_\_\_\_  
City State Zip \_\_\_\_\_  
Phone #: \_\_\_\_\_  
E-mail Address: \_\_\_\_\_

# Wood Flooring Installation Plan & Permanent Job Record

Installation Crew performing the work: \_\_\_\_\_  
Sanding/Finish Crew performing the finishing was: \_\_\_\_\_

Project Name: \_\_\_\_\_  
Subcontracted from: \_\_\_\_\_  
Phone #: \_\_\_\_\_  
Site Owner: \_\_\_\_\_  
Address: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_

Flooring Bought From: \_\_\_\_\_

Copy of Invoice attached:  Yes  No  
Copy of Packing List attached:  Yes  No  
Copy of flooring box label attached:  Yes  No

} *WFI recommends you attach this information to this "Permanent Job Record" for easy referral.*

Copy of installation instructions attached for: \_\_\_\_\_  
Flooring being installed:  Yes  No  
Mastic (if any) being used:  Yes  No Mastic Name: \_\_\_\_\_

Brand Name of Flooring Product being Installed: \_\_\_\_\_  
Solid or Engineered?  Solid  Engineered

Thickness: \_\_\_\_\_  
Width: \_\_\_\_\_  
Flooring Format: \_\_\_\_\_  
Pre-finished:  Yes  No  
Grade: \_\_\_\_\_  
Stain Color (if any): \_\_\_\_\_  
Batch #: (from box label): \_\_\_\_\_  
Square Footage Installed: \_\_\_\_\_

Note: Copy and fill out pages 1 through 4 and pages 6 through 11 for each flooring type installed on the same project.

Flooring Type: \_\_\_\_\_

## **Flooring Shipment Receipt Checklist:**

Is the quantity received correct?  Yes  No  
Is there any visible signs of shipping damage?  Yes  No  
If yes, describe.

Is there any visible signs of water damage?  Yes  No  
If yes, describe and check further.

# Wood Flooring Installation Plan & Permanent Job Record

Flooring Type: \_\_\_\_\_

Is the flooring received correct as to Species?  Yes  No

Width?  Yes  No

Thickness?  Yes  No

Length range?  Yes  No

Grade?  Yes  No

Stain Color (if any)?  Yes  No

Finish (if any)?  Yes  No

Bevel (if any)?  Yes  No

Did you get Installation Instructions? If yes, attach a copy.  Yes  No

Did you get Finish Instructions (UF only)? If yes, attach a copy.  Yes  No

Did you get Maintenance Instructions? If yes, attach a copy.  Yes  No

Did you get Refinish Instructions? If yes, attach a copy.  Yes  No

Did you get Safety/MSDS Instructions? If yes, attach a copy.  Yes  No

Have you researched whether this specie is a "problem species" and taken adequate precautions?  Yes  No

*WFI recommends that you obtain this infor and attach to "Permanent Job Record" for easy referral.*

**Note: If you answered "No" to any of the above, please request a copy from WFI by calling us at 856-764-2501 or visiting our website, [www.wflooding.com](http://www.wflooding.com), and downloading the correct information.**

Have you ordered the necessary trim/molding pieces such as nosings, reducers etc., in order to complete the project?  Yes  No

## **Flooring Shipment Quality Check-in Checklist:**

Check the Flooring Quality by "dry" racking out a few bundles and check for the following:

Moisture Content (write readings in section below):

\_\_\_\_\_ %    \_\_\_\_\_ %    \_\_\_\_\_ %    \_\_\_\_\_ %    \_\_\_\_\_ %    \_\_\_\_\_ %    \_\_\_\_\_ %    \_\_\_\_\_ %

Flooring Fit on edges and ends (tongue and groove) Rack out a bundle.

1) On edge  Okay

2) On end  Okay

3) Grade  Okay

4) Finish  Okay

If acceptable to you, then proceed and get the project owner/designer, (or whomever has final acceptance responsibility,) to review the flooring with you and physically signoff on each of the following issues using the dry racked bundles of flooring you laid out above as the sample flooring they sign off on.

# Wood Flooring Installation Plan & Permanent Job Record

Flooring Type: \_\_\_\_\_

## **OWNER SIGNOFF: Before Installation**

Confirm with the Owner that the flooring matches the samples they have chosen. Discuss and get their signoff on the following items you have reviewed with them concerning this particular batch of flooring before commencing installation.

*Please mark checkboxes after the items are reviewed and they are acceptable.*

- Color of wood (& stain, if any) is acceptable.
- Color Range acceptable – review what to cull out and/or hide (if any) is acceptable and we will cull/hide the following:  
\_\_\_\_\_
- Color Change to be expected – review how this wood species will change color over time has been communicated.
- Wood Grain Selection (if any) is acceptable.
- Character/Grade is acceptable.
- Finish Look (if site finishing, get sign off on your test samples) is acceptable.
- Finish gloss level (for PF) is acceptable.

The above items have been reviewed with me and I am satisfied with the flooring about to be installed.

Owner Signoff \_\_\_\_\_

## **OWNER SIGNOFF: After Installation**

Review the following items with the Owner/End User after installation in order to properly set the correct expectations for wood flooring's use and expected future performance:

*Please mark checkboxes as the items are completed only.*

- Review Finish Limitations and Warranty limitations – in particular, review with them how the finish and wood will scratch and dent and how to minimize this, visit:  
<[http://www.wflooring.com/Technical\\_Info/Warranty/Warranty.htm](http://www.wflooring.com/Technical_Info/Warranty/Warranty.htm)>
  - A copy of the Warranty has been given to the owner.
- Review Seasonal movement to be expected in their flooring due to changes in relative humidity
- Review the Maintenance Instructions with them and in particular, how water and wood don't mix  
<[http://www.wflooring.com/Downloads/techinfo/WFI\\_Maint\\_Instruc.pdf](http://www.wflooring.com/Downloads/techinfo/WFI_Maint_Instruc.pdf)>
  - A copy of Maintenance Instructions has been given to the Owner
- Review what "Attic Stock" remains and how they should save this in a dry place for possible use in replacing damaged floor boards in the future.
  - How many sqft were left as Attic Stock: \_\_\_\_\_

The above items on what to expect from your wood floor have been explained to me and I have received copies of my warranty and Maintenance Instructions:

Owner Signoff \_\_\_\_\_

## **FINAL OWNER SIGNOFF**

Floor has been installed to my satisfaction:  Yes  No

Final Owner Signoff \_\_\_\_\_

# Wood Flooring Installation Plan & Permanent Job Record

Sub-floor/Area being installed on: \_\_\_\_\_

## Site Specific Installation Items

Where is the flooring being installed?

Note: Use a new sheet for each different sub-floor type being installed on in the same project.

- Room Name: \_\_\_\_\_
- Grade
  - Above Grade – over basement – over crawl space
  - Above Grade
  - Below Grade
- Outside Conditions
  - Has good drainage away from building, if not, document.
- Type of Subfloor
  - Concrete
    - Shows signs of past water issues, if so, document and take preventative measures.
  - Plywood (thickness: \_\_\_\_\_)
  - Other: \_\_\_\_\_ (thickness: \_\_\_\_\_)
- Subfloor Conditions
  - Level & Flat -  Yes  No If not, correct.
- Special Conditions
  - Over Radiant Heat -  Yes  No
  - Other: \_\_\_\_\_

## Site Heating

What type of heating system:

- Oil
- Gas
- Electric
- Heat
- Pump
- Radiant
- other: \_\_\_\_\_

Are there any Wood Stoves/Heat?  Yes  No

Is there Central Air conditioning?  Yes  No

Is there Central Humidification?  Yes  No

Is there Central Dehumidification?  Yes  No

# Wood Flooring Installation Plan & Permanent Job Record

## Site Specific Items

### Site Moisture Related Conditions & Tests Results:

Date readings taken: \_\_\_\_\_

Relative Humidity reading: \_\_\_\_\_%

Temperature reading: \_\_\_\_\_

Equilibrium Point: \_\_\_\_\_ % (Refers to Equilibrium Chart on last page)

Moisture Content of sub-floor: \_\_\_\_\_% \_\_\_\_\_% \_\_\_\_\_% \_\_\_\_\_% \_\_\_\_\_%

Subfloor reading taken with what type of meter: \_\_\_\_\_

Subfloor reading taken with what type of test (if not w/meter: \_\_\_\_\_

Is the subfloor too wet to install this floor?  Yes  No

If subfloor is too wet, what corrective actions have been taken to avoid floor failure: \_\_\_\_\_

Moisture Meter used: \_\_\_\_\_

Moisture Meter settings used: \_\_\_\_\_

Species Corrected?

**Note:** As each species has different electrical properties, you need to adjust the readings the meter reads for the species being tested.  Yes  No

See WFI's website for all the species correction tables:  
[http://www.wflooring.com/Technical\\_Info/moisture\\_meter\\_settings\\_chart.htm](http://www.wflooring.com/Technical_Info/moisture_meter_settings_chart.htm)

## Moisture / Equilibrium Jobsite Plan

Date: \_\_\_\_\_

Moisture Content of other wood elements on the jobsite were found to be:

Mouldings	Doors	Cabinets	Other:	Other:
%	%	%	%	%

Projected equilibrium content for the wood flooring on this site is expected to be: \_\_\_\_\_%

Actual moisture content of the wood flooring at time of installation: \_\_\_\_\_

What is the expected moisture equilibrium points the wood flooring will reach in each of the following seasons?

	Actual Moisture Content at Installation #1	"Best Guess" - Projected Moisture Content % #2
Summer:		
Fall:		
Winter:		
Spring:		

**Note:** #1 Fill out actual Moisture Content % above on the correct season line you installed the floor.  
 #2 Fill out your best guess as to what the moisture content will reach in the installed flooring in each of the above seasons given your knowledge of the geographic area and the site heating/air conditioning.

# Wood Flooring Installation Plan & Permanent Job Record

## Addendum A

Is site relative humidity below 35%?

- If yes, what is the humidity \_\_\_\_\_ %
- Did you explain to owner the probability of shrinkage cupping in the wood floor after installation?

If a solid wood (not engineered) floor, have you equalized the wood floor?

- What was the starting Moisture Content? List six readings:  
\_\_\_\_\_ % \_\_\_\_\_ % \_\_\_\_\_ % \_\_\_\_\_ % \_\_\_\_\_ % \_\_\_\_\_ %
- How long did you equalize the wood flooring for? \_\_\_\_\_
- What was the moisture content of the wood flooring just before installation and after equalizing it?  
List six readings:  
\_\_\_\_\_ % \_\_\_\_\_ % \_\_\_\_\_ % \_\_\_\_\_ % \_\_\_\_\_ % \_\_\_\_\_ %

## Flooring Installation

Flooring being installed: \_\_\_\_\_

Installation Method:

- Gluedown - If yes, please answer the following:
  - o Which mastic used: \_\_\_\_\_
  - o Which trowel size used: \_\_\_\_\_
  - o Did you follow mastic manufacturer's instructions?
    - Yes (please attach copy)  No
  - o Did you use tape to hold pieces together while glue set?
    - Yes (what type: \_\_\_\_\_)  No
  - o Did you clean up any glue that got on the flooring face as you went?
    - Yes  No
- Nailed - If yes, please answer the following:
  - o Which gun used: \_\_\_\_\_
  - o Air pressure setting: \_\_\_\_\_
  - o Which nail length used: \_\_\_\_\_
  - o Nailing spacing: \_\_\_\_\_
- Stapled - If yes, please answer the following:
  - o Which gun used: \_\_\_\_\_
  - o Air pressure setting: \_\_\_\_\_
  - o Which size staple: \_\_\_\_\_
  - o Stapling frequency: \_\_\_\_\_

# Wood Flooring Installation Plan & Permanent Job Record

Flooring being installed: \_\_\_\_\_

## If flooring was nailed or stapled, have you made sure:

1. The nailed tongue is holding down the adjacent groove side to the sub-floor without allowing up/down movement?  
 Yes    No
2. The act of nailing/stapling is not causing dimpling on the face or edge chipping?  
 Yes    No
3. Was flooring installed directly onto the sub-floor without any sound/moisture barrier in between?  
 Yes    No – there was a moisture/sound barrier in between

If yes, what type of sound / moisture barrier was used on top of the sub-floor?

- |                                       |                                      |                                       |
|---------------------------------------|--------------------------------------|---------------------------------------|
| <input type="checkbox"/> Plastic Film | <input type="checkbox"/> Rosin paper | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> Sheet Vinyl  | <input type="checkbox"/> Cork        |                                       |
| <input type="checkbox"/> Felt paper   | <input type="checkbox"/> Foam        |                                       |

How was the Sound/Moisture barrier applied to sub-floor?

- Loose Laid  
 Glued down

If so, with what adhesive? \_\_\_\_\_

- Nailed/tacked/stapled

## If flooring was floated:

- (a) What underlayment moisture barrier used? \_\_\_\_\_
- (b) What underlayment foam used? \_\_\_\_\_
- (c) What type of glue used for the T & G? \_\_\_\_\_
  - (i) Was it applied in continuous bead?  Yes    No
  - (ii) To the side match?  Yes    No
  - (iii) To the end match?  Yes    No
- (d) Did you use tape to hold pieces together while glue set?  
 Yes   What type: \_\_\_\_\_    No
- (e) Did you clean up all the glue that got on the face as you went?  Yes    No
- (f) What type of tapping block was used? \_\_\_\_\_

# Wood Flooring Installation Plan & Permanent Job Record

## Site Finish Related

Flooring being installed: \_\_\_\_\_

### For Site Sanded and Finished flooring only:

- (a) Did you test the stains/finish you propose to use on the floor on some test pieces first to make sure there were no finish compatibility issues first?

Yes  No

Did you get owner's signoff on the look of the finish, its gloss and how the finish changes the wood's appearance?

Yes  No

- (b) Wood flooring was sanded to which grit?

1<sup>st</sup> sanding \_\_\_\_\_ grit

2<sup>nd</sup> sanding \_\_\_\_\_ grit

3<sup>rd</sup> sanding \_\_\_\_\_ grit

- (c) Wood flooring was then screened to which grit?

(i) 1<sup>st</sup> screening: \_\_\_\_\_

(ii) 2<sup>nd</sup> screening: \_\_\_\_\_

- (d) Tacked after sanding/screening?

Yes  No

- (e) Stained?

Yes  No

If yes, with which stain:

(i) Product Name: \_\_\_\_\_

(ii) Stain Color: \_\_\_\_\_

- (f) Was sanded wood fill coated before finishing?

Yes  No

If yes, with which:

(i) Product: \_\_\_\_\_

(ii) Color: \_\_\_\_\_

(iii) Was fill coat tinted in a color that matches the color the wood will turn to as it ages?

Yes  No

# Wood Flooring Installation Plan & Permanent Job Record

Continued...

## Site Finish Related

Flooring being installed: \_\_\_\_\_

For Site Sanded and Finished flooring only:

(g) Seal / Prime Coated?

Yes  No

If yes, with which:

(i) Product: \_\_\_\_\_

(ii) Gloss: \_\_\_\_\_

(iii) How many Coats? \_\_\_\_\_

(h) Top Coated?

Yes  No

If yes, with which:

(i) Product: \_\_\_\_\_

(ii) Gloss: \_\_\_\_\_

(iii) If yes, with how many Coats? \_\_\_\_\_

(i) Sanded between coats?

Yes  No

If yes, to what grit? \_\_\_\_\_

(j) If nail holes filled with putty, what kind of putty? \_\_\_\_\_

(i) Was putty colored to match what color the wood will end up after it ages?

Yes  No

For pre-finished floors that are then Top Coated:

(a) Did you test the finish you propose to use on the floor on some test pieces first to make sure there are no finish compatibility issues:

Yes  No

(b) Did you get owner sign off on the look of the new finish and its gloss level?

Yes  No

(2) If Pre-finish product being top coated was an Anti-Scratch Factory Finished Product :

(i) Screened to which grit? \_\_\_\_\_

(ii) Top Coated with Product? \_\_\_\_\_

(iii) Gloss level? \_\_\_\_

(iv) How many Coats? \_\_\_\_

# Wood Flooring Installation Plan & Permanent Job Record

Flooring being installed: \_\_\_\_\_

(3) If Pre-finish product being top coated was a Ceramic Factory Finished Product :

- (a) Tie coated with Product? \_\_\_\_\_
- (b) Top coated with Product? \_\_\_\_\_
- (c) Gloss Level? \_\_\_\_\_
- (d) How many coats? \_\_\_\_\_

## Project Clean-up

(a) Was floor covered at anytime during/after installation?

Yes  No

If yes, then:

- (i) How long was it covered for? \_\_\_\_\_
- (ii) What material was used to cover it? \_\_\_\_\_
- (iii) How was the material held down - what kind of tape? \_\_\_\_\_

(b) Was floor buffed with lambs wool to pull any edge/end splinters?

Yes  No

(c) Were the floor edges treated with Fill and Finish to help retard joint moisture penetration?

Yes  No

(d) Any other Clean-up steps taken?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Signed by: \_\_\_\_\_

Date: \_\_\_\_\_

*Keep on File as Permanent Job Record and attach all invoices and product labels and instructions.*

### Expected Equilibrium Moisture Content Chart

Temp	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%	55%	60%	65%	70%	75%	80%	85%	90%	95%	98%
30 F	1.4	2.6	3.7	4.6	5.5	6.3	7.1	7.9	8.7	9.5	10.4	11.3	12.4	13.5	14.9	16.5	18.5	21.0	24.3	26.9
40 F	1.4	2.6	3.7	4.6	5.5	6.3	7.1	7.9	8.7	9.5	10.4	11.3	12.4	13.5	14.9	16.5	18.5	21.0	24.3	26.9
50 F	1.4	2.6	3.6	4.6	5.5	6.3	7.1	7.9	8.7	9.5	10.3	11.2	12.3	13.4	14.8	16.4	18.4	20.9	24.3	26.9
60 F	1.3	2.5	3.6	4.6	5.4	6.2	7.0	7.8	8.6	9.4	10.2	11.1	12.1	13.3	14.6	16.2	18.2	20.7	24.1	26.8
70 F	1.3	2.5	3.5	4.5	5.4	6.2	6.9	7.7	8.5	9.2	10.1	11.0	12.0	13.1	14.4	16.0	17.9	20.5	23.9	26.6
80 F	1.3	2.4	3.5	4.4	5.3	6.1	6.8	7.6	8.3	9.1	9.9	10.8	11.7	12.9	14.2	15.7	17.7	20.2	23.6	26.0
90 F	1.2	2.3	3.4	4.3	5.1	5.9	6.7	7.4	8.1	8.9	9.7	10.5	11.5	12.6	13.9	15.4	17.3	19.8	23.3	26.0
100 F	1.2	2.3	3.3	4.2	5.0	5.8	6.5	7.2	7.9	8.7	9.5	10.3	11.2	12.3	13.6	15.1	17.0	19.5	22.9	25.6

From US Dept of Agriculture "Wood Handbook as an Engineering Material"