



Wood Flooring Installation Plan & Permanent Job Record

Note: This generic form was designed for your use with all wood flooring jobs. It is a tool to assist and educate everyone in the installation process by providing a checklist to address the most common issues that may occur with wood flooring installations. This form has been developed utilizing decades of experience. In particular, it highlights the importance of getting the owner to sign off 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 the owner sees the installed floor for the first time. We welcome your input and suggestions for further improving this form.

Sincerely,
The Staff at Hermosa Hardwoods

INSTALLER RESPONSIBILITIES

Fill out this installation record completely and keep it as your Permanent Job Record.

Note:

- For multiple subfloor types on the same project, make a copy of page 5 and fill out one for each subfloor type.
- For different floor species/formats being installed, make a copy of the appropriate sections and fill out one for each type.
- Prior to starting, view the Hermosa Hardwoods website (www.HermosaHardwoods.com) to research any potential issues with the specific species you are about to install, including the potential for allergic reactions to the dust, finish issues, installation tips, etc.
- Make sure the subfloor is suitable for the installation of wood flooring.
- Plan for the site-specific equilibrium points for wood on the installation site. Test for any moisture/humidity-related issues and take proper remedial actions prior to commencing installation.
- Follow all recommended installation instructions.
- Review the owner checklist section with the owner and get sign-off 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 _____

Email _____

Installation Crew Performing the Work Sanding/Finish Crew Performing the Work



Flooring Type: _____

PROJECT BACKGROUND (continued)

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

Hermosa Hardwoods recommends you attach this information to this "Permanent Job Record" for easy reference.

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

Prefinished? ☐ 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 for the same project.

FLOORING SHIPMENT RECEIPT CHECKLIST

Is the quantity received correct? ☐ Yes ☐ No

Are there any visible signs of shipping damage? ☐ Yes ☐ No

If yes, describe:

Are there any visible signs of water damage? ☐ Yes ☐ No

If yes, describe:

Flooring Type: _____

FLOORING SHIPMENT RECEIPT CHECKLIST (continued)

Is the flooring received correct as to the following:

Species:	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Length Range:	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Finish (if any):	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Width:	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Grade:	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Bevel (if any):	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Thickness:	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Stain color (if any):	<input type="checkbox"/> Yes	<input type="checkbox"/> 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 is a "problem species" and taken adequate precautions? ☐ Yes ☐ No



Hermosa Hardwoods recommends you attach this information to this "Permanent Job Record" for easy reference.

Note: if you answered "No" to any of the above questions regarding instructions, please request a copy from Hermosa Hardwoods by calling us at 1-303-586-9400 or visit our website, www.HermosaHardwoods.com, to download instructions or find species-related 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" a few bundles to verify 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 flooring is acceptable to you, have the project owner/designer (or whoever has final acceptance responsibility) review the dry-racked flooring with you and physically sign off on each of the above issues.



Flooring Type: _____

OWNER SIGN-OFF: Before Installation

Confirm with the owner that the flooring matches the samples he/she has chosen. Discuss and review with the owner the following items concerning this particular batch of flooring and get the owner's sign-off before commencing installation.

Please mark checkboxes after the items are reviewed and accepted by owner.

- ☐ Color of wood (and stain, if any) is acceptable.
- ☐ Color range is acceptable, review what to cull and/or hide (if any). Installer will cull/hide the following:
- ☐ Color change is as expected, review how this wood species will change color over time.
- ☐ Wood grain selection (if any) is acceptable.
- ☐ Character/Grade is acceptable.
- ☐ Finish look is acceptable. (If site finishing, get sign-off on test samples.)
- ☐ Finish gloss level (for PF) is acceptable.

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

Owner Sign-off: _____

OWNER SIGN-OFF: 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.

- ☐ Review Finish Limitations and Warranty Limitations in particular, review how the finish and wood may scratch and dent and how to minimize this, visit www.HermosaHardwoods.com.
- ☐ A copy of the Warranty has been given to the owner.
- ☐ Review Seasonal movement to be expected in the flooring due to changes in relative humidity.
- ☐ Review the Maintenance Instructions and, in particular, how water and wood don't mix.
 - ☐ A copy of Maintenance Instructions has been given to the owner.
- ☐ Review what "attic stock" remains and how the owner should save and store this in a dry place for possible use in replacing damaged floor boards in the future.
 - ☐ How many square feet were left as attic stock? _____ sqft

The above items on what to expect from my wood floor have been explained to me, and I have received copies of my Warranty and Maintenance instructions.

Owner Sign-off: _____

Floor has been installed to my satisfaction: ☐ Yes ☐ No

Final Owner Signoff: _____



Flooring Type: _____

SITE-SPECIFIC INSTALLATION INSTRUCTIONS

Where is the flooring being installed?

→ 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

Type of heating system:

☐ Oil ☐ Electric ☐ Pump ☐ Other:

☐ Gas ☐ Heat ☐ Radiant

Are there any Wood Stoves or Heat Sources? ☐ Yes ☐ No

Is there Central Air Conditioning? ☐ Yes ☐ No

Is there Central Humidification? ☐ Yes ☐ No

Is there Central Dehumidification? ☐ Yes ☐ No

Note: Use a new sheet for each subfloor type being installed on in the same project.

SITE-SPECIFIC ITEMS

Site Moisture-Related Conditions and Test Results:

Date readings taken:

Relative Humidity reading:

Temperature reading:

Equilibrium Point:



Flooring Type: _____

SITE-SPECIFIC ITEMS (continued)

Site Moisture-Related Conditions and Test Results (continued):

Moisture Content of subfloor:

Type of Meter used for subfloor reading:

Type of Test used for subfloor reading (if meter was not used):

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? ☐ Yes ☐ No

Note: As each species has different electrical properties, you must adjust the meter reading for the species being tested.

MOISTURE/EQUILIBRIUM JOBSITE PLAN

Date:

Moisture Content of other wood elements on the jobsite:

Moldings

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

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

#1: List the actual Moisture Content % for the season in which you installed the floor.

#2: List your best guess as to what the moisture content will reach in the installed flooring in each season, given your knowledge of the geographic area and the site's heating/air conditioning.



Flooring Type: _____

ADDENDUM A

Is the site relative humidity below 35?

☐ If yes, what is the humidity?

☐ Did you explain to the 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?

☐ 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:

☐ Glued Down ☐ If yes, please answer the following:

→ Which mastic used?

→ Which trowel size used?

→ Did you follow mastic manufacturer's instructions?

☐ Yes (please attach copy) ☐ No

→ Did you use tape to hold pieces together while glue set?

☐ Yes (please attach copy) ☐ No

→ Did you clean up any glue that got on the flooring face as you went?

☐ Yes (please attach copy) ☐ No

☐ Nailed ☐ If yes, please answer the following:

→ Which gun used?

→ Air pressure setting:

→ Which nail length used?

→ Nailing spacing:

☐ Stapled ☐ If yes, please answer the following:

→ Which gun used?

→ Air pressure setting:

→ Staple size:

→ Stapling frequency:



Flooring Type: _____

FLOORING INSTALLATION (continued)

If flooring was nailed or stapled, have you made sure of the following:

1. The nailed tongue is holding down the adjacent groove side to the subfloor 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 subfloor 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 subfloor?

- | | | |
|---------------------------------------|--------------------------------------|--------------------------------|
| <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 the subfloor?

- ☐ Loose laid
- ☐ Glued down - If so, with what adhesive?
- ☐ Nailed/tacked/stapled

If flooring was floated:

1. What underlayment moisture barrier was used?
2. What underlayment foam was used?
3. What type of glue was used for the T&G?
 - (i) Was it applied in a continuous bead? ☐ Yes ☐ No
 - (ii) To the side match? ☐ Yes ☐ No
 - (iii) To the end match? ☐ Yes ☐ No
4. Did you use tape to hold pieces together while glue set?
☐ Yes - what type? ☐ No
5. Did you clean up all the glue that got on the face as you went?
6. What type of tapping block was used?



Flooring Type: _____

SITE FINISH RELATED

For Site-Sanded and Site-Finished flooring only:

1. Did you test the stains/finish you propose to use on some test pieces first to make sure there were no finish compatibility issues?
☐ Yes ☐ No
2. Did you get the owner's signoff on the look of the finish, its gloss, and how the finish changes the wood's appearance?
☐ Yes ☐ No
3. Wood flooring was sanded to which grit?

<input type="checkbox"/> 1st sanding	grit
<input type="checkbox"/> 2nd sanding	grit
<input type="checkbox"/> 3rd sanding	grit
4. Wood flooring was then screened to which grit?

<input type="checkbox"/> 1st screening	grit
<input type="checkbox"/> 2nd screening	grit
5. Tacked after sanding/screening?
☐ Yes ☐ No
6. Stained?
☐ Yes ☐ No
If yes, with which stain:

(i) Product Name:
(ii) Stain Color:
7. Was sanded wood fill coated before finishing?
☐ Yes ☐ No
If yes, with which fill coat:

(i) Product Name:
(ii) Stain:
(iii) Was fill coat tinted in a color that matches the color the wood will turn as it ages?

☐ Yes ☐ No
8. Seal/Prime Coated?
☐ Yes ☐ No
If yes, with which seal/prime coat:

(i) Product Name:
(ii) Stain:
(iii) How many coats?



Flooring Type: _____

SITE FINISH RELATED (continued)

For Site-Sanded and Site-Finished flooring only:

8. Top Coated?

☐ Yes ☐ No

If yes, with which top coat:

(i) Product Name:

(ii) Stain:

(ii) How many coats?

9. Sanded between coats?

☐ Yes ☐ No

If yes, to what grit?

10. If nail holes filled with putty, what kind of putty?

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

☐ Yes ☐ No

For Prefinished floors that are Top Coated:

1. Did you test the finish you propose to use on the floor on some test pieces to make sure there are no compatibility issues?

☐ Yes ☐ No

2. Did you get the owner's signoff on the look of the new finish and its gloss level?

☐ Yes ☐ No

3. If pre-finish product being top coated was an Anti-Scratch Factory-Finished Product:

(i) Screened to which grit?

(ii) Top coated with which product?

(iii) Gloss level?

(iv) How many coats?

PROJECT CLEANUP

1. Was floor covered at any time during/after installation? ☐ Yes ☐ No

2. Was floor buffed with lamb's wool to pull any edges/splinters? ☐ Yes ☐ No

3. Were the floor edges treated with Fill and Finish to help retard joint moisture penetration? ☐ Yes ☐ No

4. Were any other cleanup steps taken?

Signed By: _____

Date: _____



Hermosa

HARDWOODS

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 Department of Agriculture "Wood Handbook as Engineering Material"