

FROM APS REFERRAL TO PROJECT COMPLETION

FIELD RESOURCE

A practical workflow and printable planning worksheet for defining the objective, establishing scope, protecting retained property, authorizing work and documenting completion.

A Clear Process for Complicated Properties

Major cleanouts are easier to manage when everyone understands the desired outcome, who can authorize work, what must remain, what may be removed, how unexpected conditions will be handled and what documentation is expected at completion. This guide provides a consistent framework that can be adapted to the needs of the referring professional, client, property and project.

REFER	ASSESS	DEFINE	ESTIMATE	AUTHORIZE	SCHEDULE	CLEAN	DOCUMENT	COMPLETE
01	Initial Referral Provide the general property location, reason cleanup assistance is being considered, known conditions, approximate scope, desired timeline and the appropriate contact for coordination.							
02	Property Assessment Review affected rooms and exterior areas, access, accumulation, large items, utilities, animals, observed hazards, special disposal concerns and any areas that cannot yet be accessed.							
03	Define the Desired Outcome Determine what success means for this specific property. The objective may be safe pathways and functional rooms - not necessarily an empty house.							
04	Written Scope & Estimate Define included work, exclusions, anticipated labor, disposal needs, optional work, project duration and assumptions used to prepare the estimate.							
05	Authorization Identify the person or entity authorized to approve the project and determine how additional work or scope changes must be approved.							
06	Scheduling & Site Preparation Coordinate access, occupants, pets, parking, utilities, keys, roll-off placement when applicable and any other logistics needed before the crew arrives.							
07	Cleanup Execution Crew reviews scope and safety conditions, establishes work areas, protects retained property and completes the authorized removal / cleanup work.							
08	Changes & Unexpected Conditions If concealed debris, inaccessible areas, damaged materials or other significant conditions expand the scope, document and communicate them before proceeding with additional work when reasonably possible.							
09	Completion & Documentation Review the authorized scope, document completion as appropriate, identify unresolved items and provide agreed project records and billing documentation.							

Printable Referral & Project Planning Worksheet

This worksheet is intended to organize project information. Do not place confidential client information on this form unless your agency policies and approved communication practices permit it.

REFERRAL / PROPERTY INFORMATION	
General property location	_____
Referring professional / office	_____
Best project contact	_____
Requested timeline / deadline	_____
Authorized decision-maker if known	_____

PROPERTY STATUS	
☐ Residence currently occupied	☐ Residence currently vacant
☐ Client / occupant expected on site	☐ Pets / animals present
☐ Interior access available	☐ Exterior areas included
☐ Utilities available	☐ Photos available when authorized

WHAT DOES SUCCESS LOOK LIKE FOR THIS PROPERTY?	
☐ Restore safe walking pathways	☐ Clear entrances / exits
☐ Remove accumulated trash / debris	☐ Make bathroom accessible
☐ Make sleeping area accessible	☐ Make kitchen area accessible
☐ Remove specified furniture / appliances	☐ Remove damaged carpet / materials
☐ Complete interior cleanout	☐ Exterior / porch cleanup
☐ Prepare property for repair	☐ Prepare property for vacancy / sale
☐ Reduce accumulation while retaining household contents	☐ Other objective: _____

Protecting Property That Must Remain

One of the most important decisions in a major cleanout is identifying what must not be removed. Before unrestricted removal begins, retained property should be identified as clearly as reasonably possible and communicated to the crew.

DO NOT REMOVE / ITEMS TO PRESERVE	
■ Identification / legal documents	■ Financial / benefit documents
■ Photographs / albums	■ Family keepsakes
■ Medications / medical equipment	■ Mobility / accessibility equipment
■ Jewelry / valuables	■ Electronics / devices to retain
■ Furniture to retain	■ Clothing / personal items to retain
■ Pet supplies / animal-care items	■ Other specifically designated property

Specific rooms / areas NOT authorized for removal	
Specific items / categories that must remain	
Where retained items should be placed / consolidated	

PROJECT DOCUMENTATION - AS APPROPRIATE / AUTHORIZED	
■ Written scope of work	■ Written estimate / proposal
■ Before-condition photographs	■ Progress photographs
■ Change-of-scope documentation	■ After-condition photographs
■ Completion record / walkthrough	■ Invoice / billing documentation
■ Disposal documentation when available	■ Unresolved-condition notes / next-step recommendations

CHANGE-OF-SCOPE CONTROL

If significant conditions are discovered that were not reasonably visible or included in the authorized scope, the preferred process is: **STOP OR ISOLATE THE AFFECTED WORK -> DOCUMENT THE CONDITION -> COMMUNICATE THE IMPACT -> DEFINE THE ADDITIONAL WORK / COST -> OBTAIN REQUIRED AUTHORIZATION -> RESUME.**

Examples: concealed debris; newly accessible rooms; unexpected heavy items; damaged materials beneath contents; additional disposal volume; special handling requirements; conditions requiring another qualified provider.

Project Completion Checklist

■ Authorized rooms / areas addressed	■ Specified debris / contents removed
■ Retained-property instructions followed	■ Known scope changes documented
■ Before / after documentation completed when authorized	■ Exterior / loading area checked for project debris
■ Outstanding conditions identified	■ Final walkthrough completed when requested
■ Completion documentation prepared	■ Invoice / billing documentation prepared

PROJECT NOTES / FOLLOW-UP

A Successful Cleanout Is Defined by the Objective - Not Simply by an Empty House

For some projects, success may mean a complete cleanout. For others, the correct outcome may be restoring safe access to essential rooms, reducing accumulated material, removing specific hazards or preparing the property for another service provider. Defining that outcome before work begins helps control cost, protects retained property and gives everyone a clear standard for completion.

ONE LOCAL RESOURCE. A CLEAR PROCESS.

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