



Best Practices for Documenting Service Attempts

Clear, accurate documentation is one of the most important responsibilities of a process server. Courts and clients rely on your attempt logs to confirm due diligence, validate service, and ensure compliance with state rules. The following best practices help maintain professionalism and legal accuracy.

1. Record Every Attempt Immediately

- Document attempts as soon as they happen.
- Avoid relying on memory at the end of the day.
- Accurate timestamps strengthen credibility.

2. Include Complete Date and Time Information

For every attempt, document:

- Exact date (MM/DD/YYYY).
- Exact time (including AM/PM).
- Any changes in lighting, weather, or visibility.

3. Capture the Full Address

- Include house or building number, street, unit/apartment number, city, and ZIP code.
- Note gate codes, access points, or visible address markers.
- Record if address markers were missing or unclear.

4. Describe the Environment

- Vehicles present (color, make, model).
- Signs of occupancy (lights on, packages, sounds).
- Security features: cameras, “No Trespassing” signs, locked gates, dogs.

5. Log Interaction Details

If contact is made:

- Note the recipient's response and cooperation level.
- Document whether the individual confirmed their identity.
- Record refusal, avoidance, or unusual behavior factually and neutrally.

6. Include Physical Descriptions

For successful serves:

- Approximate age, height, build.
- Clothing, distinguishing features.
- Relationship to the named party for substitute service (if applicable).

7. Add Photos When Safe and Appropriate

- Exterior photos can support attempt validity.
- Never photograph through windows or invade privacy.
- Ensure photos do not reveal confidential information.

8. Be Objective and Neutral

- Avoid emotional language or assumptions.
- Document facts only.
- Do not include opinions, personal commentary, or speculation.

9. Use Consistent Formatting

- Keep attempt logs uniform for easy review.
- Use bullet points or short sentences.
- Maintain the same structure for every serve.

10. Securely Store Records

- Keep digital copies organized by date or case number.
- Protect sensitive data with passwords or secure cloud storage.
- Retain documentation according to your business or state policy.

Proper documentation not only protects you and your clients but also upholds the integrity of the legal process. Accuracy, consistency, and professionalism are key to reliable service of process.