



Roof Inspector & Salesman Checklist

Fillable field form for roof inspector / salesman

Property / Project

Inspection Date

Address

Inspector / Representative

Client / Insured

Phone / Email

Claim / Job #

Carrier / Company

How to use this fillable checklist

Check the boxes that apply, type directly into the fields, and use the Notes areas for locations, measurements, exceptions, and photo references. Save the working PDF normally while the inspection is in progress.

To create a flat final copy: Use Print > Save as PDF (or Microsoft Print to PDF / Adobe PDF). The printed copy is flattened and no longer has editable form fields. Keep the original fillable file as your working record.

1. Inspection Conditions & Safety

CHECK each item after it has been evaluated or completed. Leave unchecked if not evaluated, not applicable, or unsafe to assess.

- | | |
|--|---|
| ☐ Weather conditions documented | ☐ Electrical/service hazards noted |
| ☐ Safe roof access established | ☐ Steep/fragile areas noted |
| ☐ Ladder placement verified | ☐ Roof dry enough for access |
| ☐ Fall-protection needs evaluated | ☐ Inaccessible areas documented |

Weather**Temperature****Roof access method****Notes / Observations**

2. Customer Needs & Property Overview

CHECK ALL THAT APPLY. Use the notes to capture the homeowner's concerns, priorities, timing, and decision factors.

- | | |
|---|---|
| ☐ Primary residence | ☐ Selling / buying property |
| ☐ Rental / investment property | ☐ Insurance claim involved |
| ☐ Commercial property | ☐ Repair request |
| ☐ Active leak concern | ☐ Replacement request |
| ☐ Storm-damage concern | ☐ Emergency / urgent timeline |
| ☐ Aging roof concern | ☐ Customer requests financing discussion |

Roof age (approx.)**Customer priority****Decision timeline****Notes / Observations**

3. Roof Configuration & Materials

CHECK ALL THAT APPLY to describe the roof system observed.

- | | |
|---|--|
| ☐ 3-tab shingles | ☐ TPO / PVC |
| ☐ Architectural shingles | ☐ EPDM |
| ☐ Designer / impact-rated shingles | ☐ Hip |
| ☐ Metal | ☐ Gable |
| ☐ Tile | ☐ Low slope / flat |
| ☐ Slate / synthetic slate | ☐ Multiple elevations |
| ☐ Wood shake / shingle | ☐ Multiple roof coverings suspected |
| ☐ Modified bitumen | ☐ Previous repairs visible |

Primary pitch

Approx. squares

Number of layers

Manufacturer/product if known

Notes / Observations

4. Roof-Covering Condition

CHECK ALL conditions actually observed. Use Notes to identify slopes, facets, quantities, and photo numbers.

- | | |
|---|---|
| ☐ Granule loss | ☐ Broken / fractured shingles |
| ☐ Cracking | ☐ Exposed fiberglass |
| ☐ Cupping / curling | ☐ Fastener issues |
| ☐ Blistering | ☐ Installation defects suspected |
| ☐ Missing shingles | ☐ Foot-traffic / mechanical damage |
| ☐ Creased shingles | ☐ Algae / organic growth |
| ☐ Lifted / unsealed shingles | ☐ Excessive wear |

Notes / Observations

5. Storm Damage Indicators

CHECK ALL storm-related indicators observed or evaluated. Distinguish storm damage from age, wear, installation, or maintenance conditions.

- | | |
|---|---|
| ☐ Hail impacts documented | ☐ Creased shingles |
| ☐ Random hail distribution evaluated | ☐ Missing shingles |
| ☐ Soft-metal collateral checked | ☐ Broken seal strips |
| ☐ Gutters/downspouts checked | ☐ Debris/tree impact |
| ☐ Vents/caps checked | ☐ Storm direction considered |
| ☐ Siding/screens collateral checked | ☐ Damage distinguished from wear |
| ☐ Wind-lift indicators | ☐ Damage distinguished from installation defects |

Reported loss date

Storm direction

Hail size observed/estimated

Notes / Observations

6. Flashings, Penetrations & Drainage

CHECK ALL components present or evaluated. Note damage, deterioration, missing items, or replacement-sensitive components.

- | | |
|---|--|
| ☐ Drip edge | ☐ Ridge vent |
| ☐ Step flashing | ☐ Skylights |
| ☐ Wall/headwall flashing | ☐ Satellite/solar mounts |
| ☐ Valleys | ☐ Gutters |
| ☐ Chimney flashing | ☐ Downspouts |
| ☐ Pipe boots | ☐ Low-slope drains/scuppers |
| ☐ Roof vents | ☐ Ponding evidence |

Notes / Observations

7. Decking, Underlayment & Ventilation

CHECK ALL conditions observed or reasonably identified. Note items that may affect scope, replacement, or installation.

- | | |
|---|--|
| ☐ Decking type identified | ☐ Exhaust ventilation present |
| ☐ Soft/deflected decking | ☐ Blocked intake observed |
| ☐ Rot/moisture staining | ☐ Mixed exhaust systems |
| ☐ Underlayment identified | ☐ Attic moisture/condensation |
| ☐ Ice barrier observed | ☐ Insulation concerns |
| ☐ Intake ventilation present | ☐ Active leak evidence |

Decking type

Underlayment type

Notes / Observations

8. Photo Documentation

CHECK each photo type after it has been captured and is usable.

- | | |
|--|---|
| ☐ Front elevation | ☐ Damage context photos |
| ☐ Rear elevation | ☐ Collateral damage |
| ☐ Left elevation | ☐ Flashings/penetrations |
| ☐ Right elevation | ☐ Gutters/downspouts |
| ☐ Building number | ☐ Interior damage |
| ☐ Roof overviews | ☐ Attic conditions |
| ☐ Each relevant facet | ☐ Measurements |
| ☐ Damage closeups | ☐ Product identification |

Approx. photo count

Photo/report reference

Notes / Observations

9. Repair / Replacement Recommendation

CHECK ALL conclusions supported by the inspection. Use Notes to explain the recommended next step and any limitations.

- | | |
|--|---|
| ☐ No material roof damage observed | ☐ Specialty trade evaluation recommended |
| ☐ Maintenance/service recommended | ☐ Engineer/consultant recommended |
| ☐ Spot repair appears feasible | ☐ Code verification needed |
| ☐ Slope replacement should be evaluated | ☐ Manufacturer guidance needed |
| ☐ Full roof replacement should be evaluated | ☐ Emergency mitigation recommended |

Notes / Observations

10. Sales Follow-Up & Customer Decision

CHECK ALL THAT APPLY to document the sales outcome and next actions. This section records the business follow-up, not technical findings.

- | | |
|--|---|
| ☐ Estimate requested | ☐ Follow-up appointment scheduled |
| ☐ Insurance estimate/supplement support discussed | ☐ Customer gathering additional bids |
| ☐ Repair proposal requested | ☐ Customer contacting carrier |
| ☐ Replacement proposal requested | ☐ Customer not ready to proceed |
| ☐ Financing information requested | ☐ No further action requested |

Proposal due date

Follow-up date

Preferred contact method

Notes / Observations

11. Final Quality-Control Review

CHECK each item only after the inspection file is complete.

- | | |
|---|---|
| ☐ Measurements reviewed | ☐ Repairability concerns documented |
| ☐ Photos reviewed | ☐ Customer concerns addressed |
| ☐ Findings match notes | ☐ Next actions documented |
| ☐ Storm vs wear distinguished | ☐ File ready for estimating/proposal |
| ☐ Components/accessories accounted for | |

Inspector signature

Review date

Notes / Observations

Finalizing the completed form

Keep an editable working copy.

Save this PDF normally while the form is in progress so the fields remain editable.

Create a flat final copy.

Choose Print > Save as PDF (or Microsoft Print to PDF / Adobe PDF). Printing creates a non-editable flattened copy suitable for the final job or claim file.