

For a concern about tree health, describe visible changes and when they became noticeable. Include the whole tree in the record, not just a close photograph of one feature. Ask how the assessor wants photographs and previous work records presented.

Resolve arrangements before relying on a date

Use the scheduling conversation to check the current scope and the property arrangements that go with it. Identify any question still awaiting an answer. If something has changed since the assessment, describe it before assuming that the earlier plan still applies.

This tree-care planning guide from Progressive Tree Service focuses on tree disease observations and the information needed to discuss it clearly.

The brief for a property manager

Identify the property contact who can [tree service information](#) answer access questions and the person who reviews the proposal. Explain which entrances and routes are normally in use. Ask what needs to be arranged with other people before a date is discussed.

Questions to keep with the record

Which observations should be recorded before discussing a possible diagnosis or treatment? Which arrangements still need confirmation? Ask for an explanation that connects the answer with the particular tree and proposed work, then record anything still unresolved.

A practical next step

Keep the current description accessible to the person coordinating the visit and the person who reviewed the proposal.

Save any proposed next step with the observations it addresses, without treating your notes as a diagnosis.

Pass on the agreed description itself, rather than shortening it into a general maintenance request.