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**BACKGROUND INFORMATION FOR FREEZE LOSS**  
**INVESTIGATION FOR THE FIRST RESPONDER TO THE SITE**

**OCCUPANCY**

**Occupied Homes**

Names & Addresses of Occupants \_\_\_\_\_

Times of Occupancy \_\_\_\_\_

**Unoccupied Homes**

When Last Visited \_\_\_\_\_

Names & Addresses of Who Visited \_\_\_\_\_

Purpose of Visit \_\_\_\_\_

Observations During Visit

\_\_\_\_\_  
\_\_\_\_\_

If for a Short Duration, explain details of occupancy including where occupants were, and what was done to the heating system (thermostat settings) to make sure it would properly protect the building against freeze damage.

\_\_\_\_\_  
\_\_\_\_\_

Arrangements for care while unoccupied

How often was property checked and by who? (List multiple people)

\_\_\_\_\_  
\_\_\_\_\_

What Instructions for checking the home were given

\_\_\_\_\_  
\_\_\_\_\_

Arrangements for mail that was received at home \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Alarm Devices Used (low temperature, no electricity alarm, house/flood alarms, low fuel alarm)

\_\_\_\_\_



### DISCOVERY OF LOSS

Who discovered the loss and when?

\_\_\_\_\_

What was done and by who ?

\_\_\_\_\_  
\_\_\_\_\_

What was observed as to what pipes were damaged?

\_\_\_\_\_  
\_\_\_\_\_

What was observed as to the Thermostat Settings

\_\_\_\_\_  
\_\_\_\_\_

Was the Primary Control (Oil burner) tripped in the off mode? Yes /No

Was the pilot flame out on a standing pilot gas appliance? Yes / No

What did the oil tank gauge read? \_\_\_\_\_

What were the Gas and Electrical Meter readings \_\_\_\_\_ Gas \_\_\_\_\_ Electric

### HEATING SYSTEM & ARRANGEMENTS FOR MAINTAINING HEAT

Who is the Oil or gas Dealer \_\_\_\_\_

How is fuel delivered, (Automatic fill or "As Needed" On Call) \_\_\_\_\_

How is fuel billed and paid for, where are bills sent and who pays them?

\_\_\_\_\_  
\_\_\_\_\_

Who services heating appliance and when was it last serviced? (Get records)

How was heat left at the site?

List each zone's thermostat setting. \_\_\_\_\_

\_\_\_\_\_



Insured name: \_\_\_\_\_

### OTHER REQUIRED DATA

#### Verify Service

Verify that the stated fuel delivery company is under agreement with the insured. Yes / No

Verify the last date of service of the appliance and verify what was done.

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Get records for service and fuel delivery

### INTERVIEW PERSONNEL

Interview Plumber or service technicians and any electricians, oil burner technicians. List details

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Ask what was seen or done to any of the equipment prior to your site visit and after the discovery of the loss.

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### Records to Be Provided to ISE

Request utility records for fuel, water and electricity.

Fuel records are needed for the prior 2 to 3 years.

If a Honeywell Nest thermostat or equivalent is in use, request monthly reports for the past 24 months.

If occupancy is needed to be verified, telephone records are required.