# Completing The Final Completion & Close-Out (FCCO) Process

When a project is nearing completion it is required that the Final Completion & Close-Out (FCCO) Process be completed in a timely and accurate manner. This process is the most involved of any of UCF's e-Builder processes, but it is not as intimidating as it appears at first glance. Users will need to upload a variety of close-out and completion documents into the system using the FCCO process, and at this stage of the project it is expected that the required material has already been completed and compiled. Most users in the FCCO workflow will only need to take action on the process once unless revisions are required. Each page layout in the FCCO process contains detailed instructions, but users should contact the eB Admins with any questions or concerns at eBuilderAdmin@ucf.edu.

The FCCO process requires actions from the following eB roles:

- Contractor
- Project Administrator
- Facilities Planning & Construction (FP&C) Project Manager
- FO Asset Management Coordinator
- Project Close-out Specialist
- Facilities & Safety Business Office (FSBO) Accounting Supervisor
- FSBO Support
- FP&C Archivist
- UCF Space Administration


Additionally, depending on project scope, these additional roles may also be required:

- Architect/Engineer (A/E)
- Utilities & Energy Services (UES) Support
- Facilities Operations (FO) Training Coordinator
- Landscape & Natural Resources (LNR) Support
- FP&C Director
- Deputy Chief of UCF Police
- Environmental Health & Safety (EHS) Director
- FO AVP
- LNR Director
- UES Director
- F&S AVP


The FCCO workflow moves from person to person, collecting close-out information and filing it in the appropriate eB project folder automatically. It may also spawn child processes if needed. Users can send the process back to the contractor or other relevant user for corrections if necessary. The full FCCO workflow is shown on page 2 and will be explained further in this document.

Start — Submit → PR Quality Review — Reviewed → Major or Minor?

Contractor Revise — Revised/Revise to Contractor

Major or Minor? — Minor → Spawn FCDS — Spawn Complete
Major → AES Check — Yes → Spawn AES — Spawn Complete
AES Check — No → CES Check — Yes → Spawn CES — Spawn Complete
CES Check — No → A/E on Project? — Spawn Complete

A/E on Project? — Yes → A/E Review — Revise to Contractor → Contractor Revise — Resubmit
A/E Review — Reviewed → CI Check
A/E on Project? — No → CI Check
CI Check — No → PM Review
CI Check — Yes → UES Review

Reroute

UES Review — Revise to Cont. → Contractor Revise — Resubmit
UES Review — Reviewed → PM Review — Revise to UES
PM Review — Revise to A/E → A/E Review — Resubmit
PM Review — Revise to Contractor → Contractor Revise
PM Review — Approved → Training Check

Training Check — Yes → FO Training Sign-off — Revise to Contractor → Contractor Revise — Resubmit
FO Training Sign-off — Approved → Training Complete?
Training Complete? — No → Contractor Revise
Training Complete? — Yes → Sec Restore Check
Training Check — No → Sec Restore Check
Sec Restore Check — No → Asset Management Review
Sec Restore Check — Yes → LNR Review — Revise to Contractor → Contractor Revise — Resubmit
LNR Review — Approved → Asset Management Review

Asset Management Review — Revise to Contractor → Contractor Revise — Resubmit to Assets
Asset Management Review — Approved to Closeout → Closeout Specialist Review

Closeout Specialist Review — Revise to PM → PM Revise — Revise to Contractor → Contractor Revise — Resubmit to PM
Closeout Specialist Review — Resubmit to CO Spec.
Closeout Specialist Review — Approved → Director Check

Director Check — Yes → FPC Director Review — Revise to PM → PM Revise — Revise to Contractor → Contractor Revise
FPC Director Review — Resubmit to FPC Dir. / Resubmit to PM — Approved → Deputy Chief of Police Review
Deputy Chief of Police Review — Revise to PM → PM Revise → Contractor Revise — Resubmit to DCP — Approved → EHS Director Review
EHS Director Review — Revise to PM → PM Revise → Contractor Revise — Resubmit to EHS Dir. — Approved → FO AVP Review
FO AVP Review — Revise to PM → PM Revise → Contractor Revise — Resubmit to FO AVP — Approved → LNR Director Review
LNR Director Review — Revise to PM → PM Revise → Contractor Revise — Resubmit to LNR Dir. — Approved → UES Director Review
UES Director Review — Revise to PM → PM Revise → Contractor Revise — Resubmit to UES — Approved → AVP Approval

AVP Approval — Revise to FPC Dir. → FPC Director Revise — Revise to PM → PM Revise — Resubmit/Revise to Contractor → Contractor Revise
FPC Director Revise — Resubmit to FPC Dir.
AVP Approval — Resubmit to F&S AVP
AVP Approval — Approved → Payment Notice

Director Check — No → Payment Notice
Payment Notice — Acknowledged → FSBO Confirms Final Payment
FSBO Confirms Final Payment — Revise to PM → PM Revise — Resubmit
FSBO Confirms Final Payment — Confirmed → FSBO Financial Close-out

FSBO Financial Close-out — Revise CO Specialist → Closeout Specialist Revise — Revise to PM → PM Revise — Resubmit
FSBO Financial Close-out — Close Financial / Return To FSBO → Project Coordinator Review
Project Coordinator Review — Revise to CO Sp. → Closeout Specialist Revise — Revise to PM → PM Revise — Resubmit
Project Coordinator Review — Approved for Closing → Revoke Keys MM

Revoke Keys MM — Notice Sent → Archivist Review
Archivist Review — Revise to CO Sp. → Closeout Specialist Revise — Revise to PM → PM Revise — Resubmit
Archivist Review — Docs Archived → Space Admin Review
Space Admin Review — Revise to CO Sp. → Closeout Specialist Revise — Revise to PM → PM Revise — Resubmit to CO Spec.
Space Admin Review — Resubmit to Space Ad
Space Admin Review — Project Closed → Finish

Void

Legend:
- Data Entry
- Conditional
- Spawn Process
- Automation Step
- Connector

2

# Start Step

This kick-off step is initiated by the General Contractor or, if necessary, the FP&C Project Manager and includes the following sections in which the listed information is collected.

**Routing Assistance**

Please answer these questions to determine the path the workflow will follow.

| | |
|---|---|
| **\* A/E Check:** | Is there an A/E on this project?<br>○ Yes<br>○ No |
| **\* TAB Check:** | Was T&B required for this project?<br>○ Yes<br>○ No |
| **\* CX Check:** | Was commissioning required on this project?<br>○ Yes<br>○ No |
| **\* LNR Check:** | Did this project alter the campus landscape or hardscape or have an exterior construction staging area?<br>○ Yes<br>○ No |
| **\* Training Check:** | Was equipment added to this project which required owner training?<br>○ Yes<br>○ No |

**Routing Assistance** – these five Yes/No questions determine how the workflow will route and asks about A/E involvement, test & balancing (T&B), commissioning, alteration of campus landscaping, and required owner training for new equipment.  Accurate responses are crucial for a timely close-out.

**Code Completion**

Contractor confirms project is complete. If project was completed under a building permit, contractor uploads the applicable Certificate of Occupancy or Certificate of Completion and both sides of the project's Permit Card

Naming Standards for Code Completion Documents

Certificate of Completion: COC_Project Number_Permit Number

Example: **COC_20123001_20-0019**

Certificate of Occupancy: COO_Project Number_Permit Number:

Example **COO_UCF563A_20-0019**

Permit Card: PRMTCD_Project Number_Permit Number

Example: **PRMTCD_20123001_20-0019**

| | |
|---|---|
| **\* Contractor Confirms Project Completion. If Applicable CC/CO is Attached.:** | ○ Yes |
| **Attach Certificate of Occupancy / Completion:** | *If you have a CO then the Substantial Completion process has to be complete prior to the start of the FCCO Process.*<br>Drag and drop file here   or   **Browse e-Builder**   **Browse Computer** |
| **Attach Permit Card:** | Drag and drop file here   or   **Browse e-Builder**   **Browse Computer** |

**Code Completion** – this section requires the contractor to confirm that the project is complete and, if necessary, upload the Certificate of Occupancy / Completion and the permit card.

**As-Built Drawings**

Contractor confirms that As-Built Drawings have been provided here and to the A/E and uploads the drawings.

Every sheet of the complete **As-Built Drawings must be stamped "As-Built" and dated in the lower right-hand corner, whether or not there are changes in that plan sheet. The set of As-Built Drawings must be a complete package, not just a collection of the pages containing changes.** The As-Built Drawing Package should **NOT** include extemporaneous documents.

As-Built Drawings Naming Standard:

Complete As-Built Drawings: ASBLT_Project Number_Contractor Name:

Example: **ASBLT_UCF563_ABC Contractor**

If a General Contractor receives As-Built Drawings from several different construction subcontractors, they may be combined, and named as above; or an individual file for each discipline may be zipped together in a zip file named as above. If you choose the later, the files for each discipline should be named as follows:

Mechanical Discipline As-Built Drawings : ASBLT_MECH_Project Number_Mechanical Contractor Company

Example: **ASBLT_MECH_UCF563_Trane**

Electrical Discipline As-Built Drawings: ASBLT_ELEC_Project Number_Electrical Contractor Company

Example: **ASBLT_ELEC_UCF563_RCG**

Plumbing Discipline As-Built Drawings: ASBLT_PLUM_Project Number_Plumbing Contractor Company

Example: **ASBLT_PLUM_UCF563_Waterworks**

Fire Protection Discipline As-Built Drawings : ASBLT_FIRE_Project Number_Fire Protection Contractor Company

Example: **ASBLT_FIRE_UCF563_Freedom Fire**

| * Contractor Confirms Complete As-Built Drawings Are Attached: | ○ Yes<br>○ Not Required. This project did not require As-Builts. |
|---|---|
| Attach As-Built Drawings: | _Drag and drop file here_ or **Browse e-Builder** **Browse Computer** |

**As-Built Drawings** –the contractor shall confirm that the As-Built Drawings have been completed and upload them into the system.

**Punchlist**

Contractor confirms that all punch-list tasks have been completed and attaches the completed punch-list.

Completed Punch-list Naming Standard

Completed Punch-list: FPUNCH_Project Number_Permit Number

Example: **FPUNCH_20123001_21-0001**

| * Contractor Confirms Punch-list is Complete and Attached: | ○ Yes<br>○ Not Required. Owner accepted completed project without issue at first punch-walk. |
|---|---|
| Attach Completed Punch-list: | _Drag and drop file here_ or **Browse e-Builder** **Browse Computer** |

**Punchlist** – the completion of all punchlist tasks must be confirmed and the list itself must be uploaded.

**Commissioning**

If commissioning was required of the project, the contractor confirms that commissioning for the project has been completed and attaches Final T&B Report approved by Engineer of Record. Preliminary Commissioning Report and completed Commissioning Issues Log should be uploaded, if available.

Naming Standards for Cx Documents:

Final Test and Balance EOR Approval: FTB_Project Number:

Example: **FTB_Project Number**

Preliminary Cx Report and Commissioning Log: PCX_Project Number

Example: **PCX_20123001**

| | |
|---|---|
| * Contractor Confirms Commissioning is Complete: | ○ Yes<br>○ Not required. Commissioning was not required for this project. |
| Attach Final T&B Report Approved by EOR: | Drag and drop file here  or  **Browse e-Builder**  **Browse Computer** |
| Attach Preliminary Cx Report & Completed Issues Log: | Drag and drop file here  or  **Browse e-Builder**  **Browse Computer** |

**Commissioning** - if commissioning was required of the project, the contractor shall confirm that commissioning for the project has been completed and attach the Final T&B Report approved by the Engineer of Record (EOR). The Preliminary Commissioning Report and completed Commissioning Issues Log should be uploaded, if available.

**Assets**

Contractor confirms that a complete asset list has been provided for all applicable equipment installed during the project and then attaches the complete asset list.

Naming Convention for the Asset List

Final Asset List: ASSET_Project Number

Example: **ASSET_20123001**

See asset list template at link: https://fo.ucf.edu/sites/default/files/pictures/Project%20Asset%20Table.xlsx

| | |
|---|---|
| * Contractor Confirms Asset List is Complete and Inclusive of All Assets on the Project: | ○ Yes.<br>○ Not Required. There were no changes to assets during the project. |
| Attach Final Asset List: | Drag and drop file here  or  **Browse e-Builder**  **Browse Computer** |

**Assets** – the contractor shall confirm that a complete asset list has been provided for all applicable equipment installed during the project and then attach the complete asset list.

**Manufacturer's O&M and Warranties**

Contractor confirms all manufacturer's O&Ms and warranties have been uploaded for installed equipment and materials and are named and packaged in the manner specified below.

Each piece of equipment or material should have its own warranty and O&M file or one combined file for both the O&M and warranty if this is how they are provided from the manufacturer. All of the individual files for manufacturer's O&Ms and warranties for the project should bound together in a zip file named as follows:

Warranty and O&M zip file:  WOM_Project Number_Contractor Name

Example: **WOM_19123001_ABC Contractor**

Manufacturer Warranties: CSI Division+Section+Subsection_WTY_Item Name

Example: **087100_WTY_Door Hardware**

Manufacturer O&M: CSI Division+Section+Subsection_O&M_Item Name

Example: **087100_O&M_Door Hardware**

Combined Manufacturer O&M and Warranty: CSI Division+Section+Subsection_WOM_Item Name

Example: **087100_WOM_Door Hardware**

| | |
|---|---|
| **\*** Contractor Confirms All Manufacturer O&Ms and Warranties Are Attached and in Proper Format: | ○ Yes<br>○ Not Required. No equipment or materials requiring O&M were added as part of the project. |
| Attach Manufacturer O&M and Warranties: | *Drag and drop file here*  or  **Browse e-Builder**  **Browse Computer** |

**Manufacturer's O&M and Warranties** –the contractor shall confirm all manufacturer's O&Ms and warranties have been uploaded for installed equipment and materials, and are named and packaged in the manner specified.  Each piece of equipment or material should have its own warranty and O&M file or one combined file for both the O&M and warranty if this is how they are provided from the manufacturer. All of the individual files for manufacturer's O&Ms and warranties for the project should be bound together in a ZIP file.

**Contractor Warranty(s)**

Contractor confirms that all warranties for labor, equipment and material have been provided and attaches all applicable warranties.

Contractor warranties must reflect the Certificate of Completion or Occupancy date, specify the project, and be executed via signature by an authorized representative of the company providing the warranty.

Naming convention for contractor's warranties is as follows:

WTY_Trade Discipline_Contractor Name_Project Number

Example: **WTY_Electrical_ABC Electrical_20123001**

If you are providing several warranties (GC +Subs), bind each individual file, named as above, in a zip file named WTY_Project Number_Contractor Name

Example: **WTY_20123001_ABC Contractor**

| | |
|---|---|
| * Contractor Confirms Contractor Warranty(s) Are Attached and in Proper Format: | ○ Yes |
| Attach Contractors' Warranties: | _Drag and drop file here_  or  **Browse e-Builder**  **Browse Computer** |

**Contractor Warranty** – the contractor shall confirm that all warranties for labor, equipment and material have been provided and attach all applicable warranties. Contractor warranties must reflect the Certificate of Completion or Occupancy date, specify the project, and be executed via signature by an authorized representative of the company providing the warranty.

**Owner´s Training**

Contractor confirms that all Owner Training is complete and attaches applicable Training Schedule Matrix, Training Sign-in Sheets, and Training Videos

Naming Convention for Owner´s Training Materials

Training Schedule Matrix: TRNMatrix_Project Number:

Example: **TRNMatrix_20123001**

Bind Training Sign In Sheets into a compressed zip file: TRN_Project Number

Example: **TRN_20123001**

Individual Sign in Sheets TRN_Training Subject_Project Number

Example: **TRN_HVAC Controls_20123001**

Bind training videos into a compressed zip file named TRNVID_Project Number

Example: **TRNVID_20123001**

Individual Training Videos: TRNVID_Training Subject_Project Number

Example: **TRNVID_HVAC Controls_20123001**

| | |
|---|---|
| **\* Contractor Confirms Owner Training Complete and Training Materials Are Attached:** | ○ Yes<br>○ Not Required. No assets or equipment was added to the project that required owner training. |
| Attach Training Schedule Matrix: | *Drag and drop file here*   or   **Browse e-Builder**   **Browse Computer** |
| Attach All Sign-In Sheets: | *Drag and drop file here*   or   **Browse e-Builder**   **Browse Computer** |
| Attach Training Videos (compress multiple files into one zip file): | *Drag and drop file here*   or   **Browse e-Builder**   **Browse Computer** |

**Owner´s Training** - the contractor shall confirm that all Owner Training is complete and attach the applicable Training Schedule Matrix, Training Sign-in Sheets, and Training Videos.  Videos are to be compiled into a single ZIP file.  The file size limit for files uploaded here is 2 GB.  Attempting to upload a file that exceeds that limit will result in errors.  In the event that the ZIP file exceeds the limit, you will need to use the Documents module to manually upload the file.

To upload into the Documents module, complete the following:

1) On the Project Menu on the left side of the project page (not the process page), click on Documents.  This will open the Documents module.
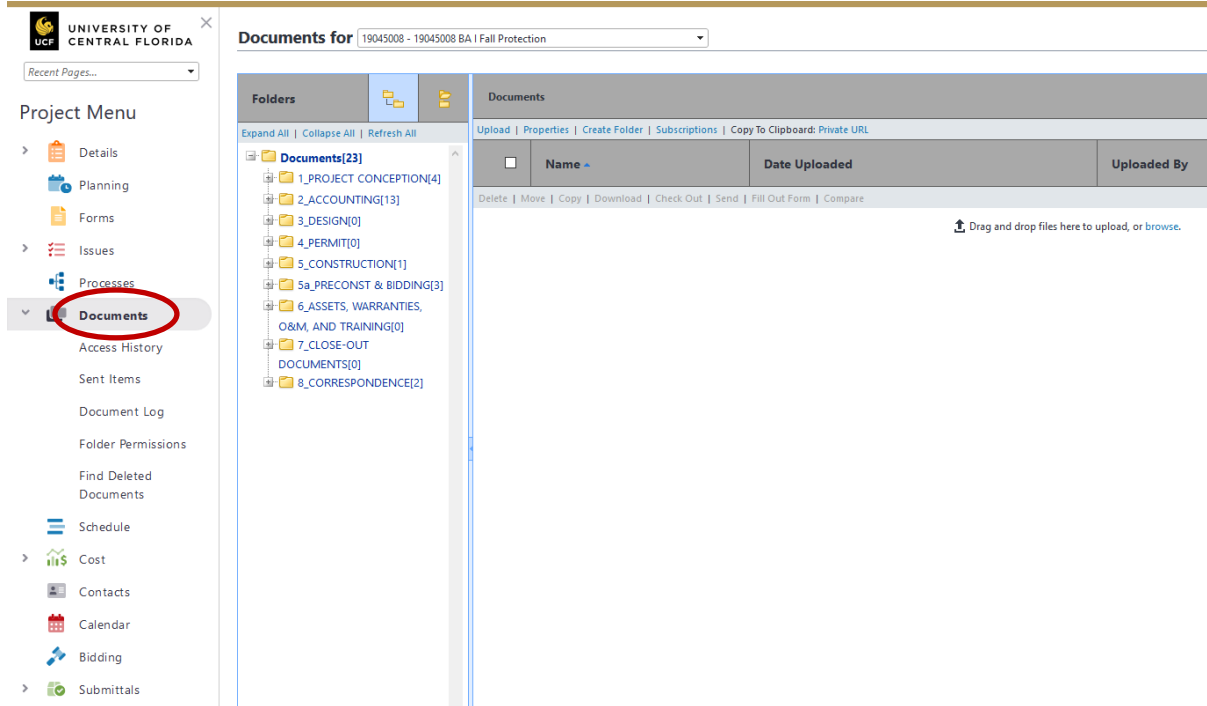
2) In the Documents module, click on the + sign next to the folder for 6_ASSETS, WARRANTIES, O&M, AND TRAINING.  The folder tree will expand.  Click on the + sign next to 06.05 FACILITIES & SAFETY TRAINING.  The folder tree will expand again.  Click on the folder icon for 06.05.03 TRAINING VIDEOS.  This will make that folder the active folder.
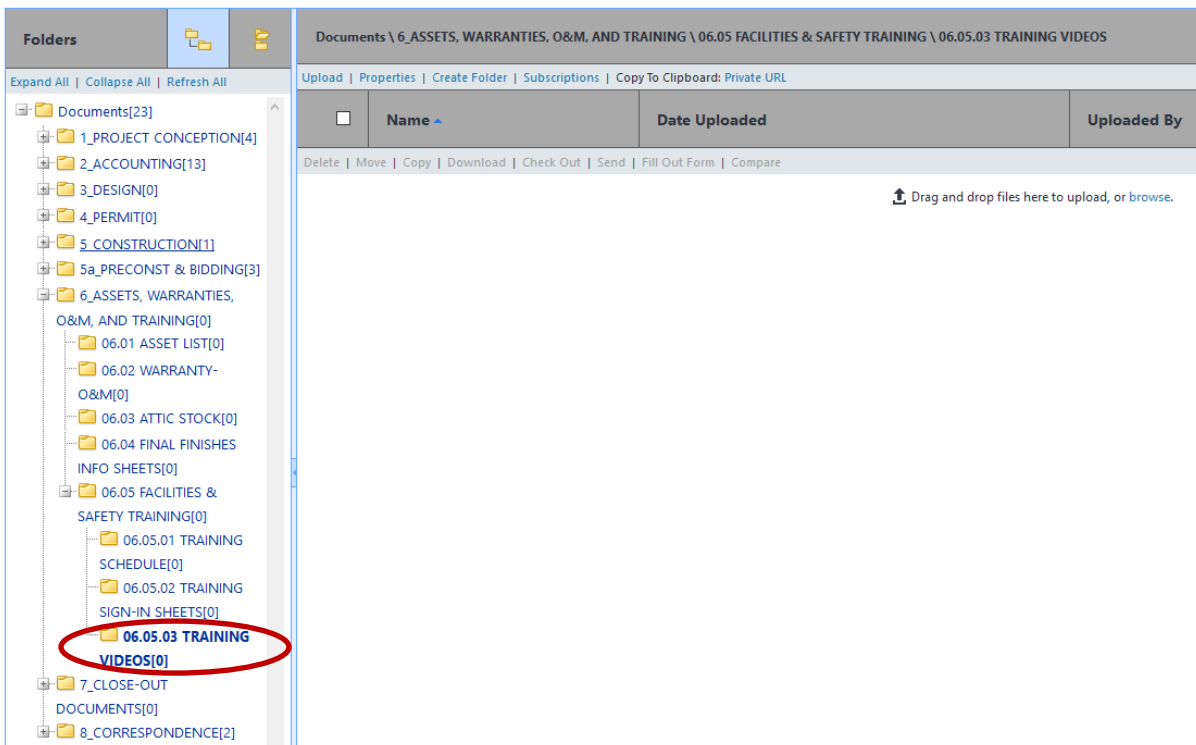
3) Drag and drop the large ZIP folder of training videos into the large white blank area to upload it. A File Upload box will appear to track the upload progress.



4) On completion, the Cancel button will change to Done. Click it to close the box. Then return to the FCCO process page. Use the Browse e-Builder button to point the FCCO page to the file you just uploaded.

5) Use the attachment window to navigate back to 06.05.03 TRAINING VIDEOS and click the checkbox next to the file you just uploaded into the Documents module, then click Attach. This completes the manual upload process.



**Landscape and Site Restoration** – the contractor shall confirm that any landscape or hardscape altered by the project has been restored to UCF Landscape and Natural Resources design standards and then attach photos of the project site area that demonstrate restoration.

**Elevator Inspections and Certifications**

If the project included elevator scope, contractor confirms inspection and certification of elevators and then attaches inspections and confirmation from Facilities Operations that certificates have been placed in elevator.

Elevator Inspections Files: ELVTR_Building Number_Elevator Number:

Example: **ELVTR_123_1**

If multiple inspections, bind into a compressed zip file: ELVTR_Project Number

Example: **ELVTR_20123001**

Confirmation from Facilities Operation: LTR_FO_Elevator Certification Placement_Project Number

Example: **LTR_FO_Elevator Certification Placement_20123001**

| * Contractor Confirms Inspection/Certification of Elevators: | ○ Yes.<br>○ Not Required. Project did not include elevator scope. |
| --- | --- |
| Attach Elevator Inspections: | *Drag and drop file here*   or   **Browse e-Builder**   **Browse Computer** |
| Attach Confirmation From FO that Certificate Are Placed in Elevator(s): | *Drag and drop file here*   or   **Browse e-Builder**   **Browse Computer** |

**Elevator Inspections and Certifications** - if the project included elevator scope, contractor shall confirm inspection and certification of elevators and then attach the inspections and confirmation from Facilities Operations that certificates have been placed in elevators.

**LEED Certification**

Contractor indicates if the project was designed and executed for LEED Certification.

| * Does the Project Qualify for LEED Certification?: | ○ Yes<br>○ No. The project was not designed to qualify for LEED certification. |
| --- | --- |

**LEED Certification** – the contractor shall indicate if the project was designed and executed for LEED Certification.

**Project Document Naming Conventions** - a copy of the project document naming conventions is included at the bottom of the submission page as reference. The conventions are also included at the end of this guide.

As the FCCO process moves through the workflow, users often have the option to return the process to the contractor to request revisions. Returning the process to the contractor requires that the user leave a comment in eB explaining which revisions are needed. The contractor can then make those revisions and return it back to the user who requested those revisions who can either move it on to the next step in the workflow or return it back to the contractor again.

The contractor has the ability to void the process during this revision process if it is determined that the process must be restarted due to excessive errors or uncorrectable issues. Voided processes cannot be restarted from where they left off. A new FCCO process must be started.

The FCCO process cannot be voided once the workflow clears the Project Close-out Specialist Review step. It is assumed that if all parties have successfully approved and/or reviewed the process through that point, the project will successfully close.

**DID YOU KNOW?** The FCCO Start Step does not have to be completed in a single sitting. Fill out as part of the form, then click Save Draft instead of Submit to save the draft process. The process will appear in the list of processes (not your court on the front page of eB, but the Processes page for the project) in brown italicized text. Click on it to resume filling out the form. Only the person who created the draft process can see it on the list.

# Project Administrator Quality Review

**Project Administrator Quality Check**

Project Administrator:

1. Review the contractor's responses and the attachments provided to ensure proper file naming and packaging. If there are any apparent errors send the process back to the contractor with comment specifying required correction.

2. Update project details

    Project Status: Close-out

    Project Priority: Close-out/Hold

    Date project turned over to closeout team: Today's Date

4. Verify all other project details for completeness and accuracy

5. Request financial summary from FSBO via email.

6. Review any open, billable AiM Work Order Phases for the project and email the associated F & S Shop to indicate that project has entered final closeout and billing should be completed immediately. Note any open work orders as a comment.

7. If appropriate, start the contractor and A/E evaluations. Before doing this, verify that a contractor and PM have been added to contacts of the project.

8. Select Reviewed and Take Action

| | |
|---|---|
| * Project Admin Confirms Satisfactory Naming and Packaging of Close-Out Documents: | ○ Yes<br>○ No. Process revised to initiator with comment. |
| * Date Project Entered Close-out: | [____] 📅 |
| * Project Admin Confirms Project Details Page is Updated: | ○ Yes |
| * Project Admin Requested Financial Summary from FSBO: | ○ Yes |
| * Would You Like to Start the Contractors Evaluation Survey?: | ○ Yes<br>○ No |
| * Would you Like to Start the A/E Evaluation Survey?: | ○ Yes<br>○ Not Required. No A/E on project. |

The Project Administrator and the Project Close-out Team shall review the submitted form to ensure that all requirements have been met and all files are named according to the established project document naming conventions.  The team shall review the contractor's

inputs on the Start Step and provided attachments and send it back to the contractor to correct any errors, plus perform the following tasks:

- Update project details
  - o Project Status: Close-out
  - o Project Priority: Close-out/Hold
  - o Date project turned over to closeout team: Today´s Date
- Verify all other project details for completeness and accuracy
- Request financial summary from FSBO via e-mail.
- Review any open, billable AiM Work Order Phases for the project and email the associated F&S Shop to indicate that project has entered final close-out and billing should be completed immediately. Note any open work orders as a comment.
- If appropriate, start the contractor and A/E evaluations by answering Yes to the applicable survey questions. Before doing this, verify that a contractor and PM have been added to the Project Participants list.

The Project Close-out Survey (PCOS) for minor projects is automatically started after this step is completed and does not require user action to initiate.  PCOS will not start for major projects.

# Architect/Engineer Review

This step is required on projects with an A/E.

**As-Built Drawings**

A/E confirms contractor´s As-Built Drawings have been provided to A/E, reviewed and all changes have been incorporated into the project´s Record Documents.

| | |
|---|---|
| Contractor Confirms Complete As-Built Drawings Are Attached: | |
| * A/E Confirms Complete As-Built Drawings Are Attached and Reviewed: | ○ Yes<br>○ No. Returning to initiator with comment. |
| Attach As-Built Drawings: | |

**As-Built Drawings** – the A/E shall confirm that the contractor´s As-Built Drawings have been provided to A/E, reviewed and all changes have been incorporated into the project´s Record Documents.

**Record Set**

A/E uploads record drawings and specifications

A/E uploads the Architect of Record Certificate of Completion as confirmation that the project is complete.

| | | | |
|---|---|---|---|
| * Attach Record Set of Drawings - CAD with XREFs: | Drag and drop file here | or **Browse e-Builder** | **Browse Computer** |
| Attach Record Set of Drawings - Revit Final Model: | Drag and drop file here | or **Browse e-Builder** | **Browse Computer** |
| * Attach Record Set of Drawings - PDF: | Drag and drop file here | or **Browse e-Builder** | **Browse Computer** |
| * Attach Record Set of Drawings - Updated Specifications: | Drag and drop file here | or **Browse e-Builder** | **Browse Computer** |
| * Attach Architect's of Record Final Completion Certificate: | Drag and drop file here | or **Browse e-Builder** | **Browse Computer** |

**Record Set** – the A/E shall upload record drawings and specifications as well as the Architect of Record Certificate of Completion as confirmation that the project is complete.

**Commissioning**

If the project included commissioning, the A/E uploads preliminary Cx Report, completed Issues Log, Final EOR-approved T & B report and a letter of confirmation from the Engineer of Record that commissioning is complete. If any of these documents have already been uploaded by the contractor the A/E confirms the documents are correct and complete.

Naming Standards for Cx Documents:

Preliminary Cx Report and Commissioning Log: PCX_Project Number

Example: **PCX_20123001**

Final Test and Balance: FTB_Project Number

Example: **FTB_Project Number**

EOR Letter of Cx Completion: LTR_EOR_CXcomplete_Project Number

Example: **LTR_EOR_CXcomplete_20123001**

| | |
|---|---|
| Contractor Confirms Commissioning is Complete: | |
| Attach Letter in which EOR Confirms Commissioning is Complete.: | Drag and drop file here or **Browse e-Builder** **Browse Computer** |
| Attach Preliminary Cx Report & Completed Issues Log: | Drag and drop file here or **Browse e-Builder** **Browse Computer** |
| Attach Final T&B Report Approved by EOR: | Drag and drop file here or **Browse e-Builder** **Browse Computer** |

**Commissioning** - if the project included commissioning, the A/E shall upload the preliminary Cx Report, completed Issues Log, Final EOR-approved T&B report, and a letter of confirmation from the Engineer of Record that commissioning is complete. If any of these documents have already been uploaded by the contractor, then the A/E shall confirm the documents are correct and complete.

**Assets**

If assets were added during the project, A/E reviews and confirms asset list is complete.

See asset list template at link: https://fo.ucf.edu/sites/default/files/pictures/Project%20Asset%20Table.xlsx

| | |
|---|---|
| Contractor Confirms Asset List is Complete and Inclusive of All Assets on the Project: | |
| * A/E Confirms Asset List is Complete and Inclusive of All Project Assets: | ○ Yes<br>○ Not Required. No changes to assets were required by the project. |
| Attach Final Asset List: | |

**Assets** - if assets were added during the project, the A/E shall review and confirm that the asset list is complete.

**Manufacturer´s O&M and Warranties**

If equipment or materials requiring O&M were installed during project, A/E reviews and confirms all O&Ms have been provided.

| Contractor Confirms All Manufacturer O&Ms and Warranties Are Attached and in Proper Format: | |
| --- | --- |
| * A/E Confirms O&Ms Are Complete and Include All Equipment and Materials Installed on Project: | ○ Yes<br>◉ Not Required. No changes to equipment or materials requiring O&M were installed by the project.<br>○ No. Returning to initiator with comment. |
| Attach Manufacturer O&M and Warranties: | |

**Manufacturer´s O&M and Warranties** - if equipment or materials requiring O&M were installed during project, the A/E shall review and confirm that all O&Ms have been provided.

**Manufacturer´s O&M and Warranties**

If equipment or materials requiring O&M were installed during project, A/E reviews and confirms all O&Ms have been provided.

| Contractor Confirms All Manufacturer O&Ms and Warranties Are Attached and in Proper Format: | |
| --- | --- |
| * A/E Confirms O&Ms Are Complete and Include All Equipment and Materials Installed on Project: | ○ Yes<br>○ Not Required. No changes to equipment or materials requiring O&M were installed by the project. |
| Attach Manufacturer O&M and Warranties: | |

**LEED Certification** - if the project was designed to LEED certification, the A/E shall confirm LEED submission has occurred and attach the confirmation of application submission.

**LEED Certification**

If the project was designed to LEED certification, the A/E confirms LEED submission has occurred and attaches confirmation of application submission.

| * Does the Project Qualify for LEED Certification?: | ○ Yes<br>○ No. The project was not designed to qualify for LEED certification. |
| --- | --- |
| * A/E Confirms LEED Application is Complete and Submitted: | ○ Yes<br>○ Not Required. This building was not designed to be LEED certified. |
| * Attach Confirmation of LEED Application Submission: | *Drag and drop file here*   or   **Browse e-Builder**   **Browse Computer** |

**Punchlist** - if applicable, the A/E shall confirm the all punchlist tasks have been completed and that the attached punchlist is complete.

**Owner´s Training**

If applicable, the A/E confirms owner´s training is complete and reviews the training-related materials for completeness.

| | |
|---|---|
| Contractor Confirms Owner Training Complete and Training Materials Are Attached: | |
| * A/E Confirms Owner Training is Complete and Training Materials Are Attached: | ○ Yes<br>○ Not Required. No assets or equipment that required owner training were installed during this project. |
| Attach Training Schedule Matrix: | |
| Attach All Sign-In Sheets: | |
| Attach Training Videos (compress multiple files into one zip file): | |

**Owner's Training** - if applicable, the A/E shall confirm owner´s training is complete and review the training-related materials for completeness.

# UES Review

This step is required on projects with test & balance or commissioning.

**Commissioning**

UES Representative reviews and/or provides documentation related to commissioning for the project and attaches letter indicating commissioning is complete and the Final Commissioning Report will be provided in less than 45 days. Upload the final commissioning report is it is available.

Naming Standards for uploaded Cx documents

Preliminary Cx Report and Commissioning Log: PCX_Project Number: **PCX_20123001**

Final Test and Balance: FTB_Project Number: **FTB_Project Number**

UES Letter of Cx Completion: LTR_UES_CXcomplete_Project Number: **LTR_UES_CXcomplete_20123001**

Systems Manual: SYS_Project Number: **SYS_20123001**

| | |
|---|---|
| Contractor Confirms Commissioning is Complete: | |
| Attach Letter in which EOR Confirms Commissioning is Complete.: | |
| Cx Agent Attaches Letter to EoR that Cx is Complete: | |
| * UES Attaches Letter Confirming Cx is Complete: | Drag and drop file here   or   Browse e-Builder   Browse Computer |
| * Attach Preliminary Cx Report & Completed Issues Log: | Drag and drop file here   or   Browse e-Builder   Browse Computer |
| * Attach Final T&B Report Approved by EOR: | Drag and drop file here   or   Browse e-Builder   Browse Computer |
| * Attach System Manual(s): | Drag and drop file here   or   Browse e-Builder   Browse Computer |
| Attach Final Cx Report (if available): | Drag and drop file here   or   Browse e-Builder   Browse Computer |

**Commissioning** – the UES Representative shall review and/or provide documentation related to commissioning for the project and attach a letter indicating that commissioning is complete and the Final Commissioning Report will be provided in less than 45 days.  The UES Representative shall also upload the final commissioning report if it is available.

**Owner´s Training**

UES reviews training information and materials provided by the contractor and confirms that commissioning-related systems training is complete per the commissioning plan.

| | |
|---|---|
| Contractor Confirms Owner Training Complete and Training Materials Are Attached: | |
| A/E Confirms Owner Training is Complete and Training Materials Are Attached: | |
| Commissioning Agent Confirms Cx Training per Cx Plan is Complete: | |
| **\*** UES Confirms Cx Training is Complete per Cx Plan: | ○ Yes |
| Attach Training Schedule Matrix: | |
| Attach All Sign-In Sheets: | |
| Attach Training Videos (compress multiple files into one zip file): | |

**Owner's Training** – the UES Representative shall review training information and material provided by the contractor and confirms that commissioning-related systems training is complete per the commissioning plan.

**UES Billing**

UES representative confirms that all UES-billing related to the project (work orders, commissioning, utilities) has been processed.

| | |
|---|---|
| **\*** UES Representative Confirms UES Billing on this Project is Complete: | ○ Yes<br>◉ UES did not review |

**UES Billing** – UES representative should review that all project-related, UES invoices and UES work orders have been billed. The option "UES did not review" is a default in the case that UES did not have scope on this project and the process did not come to their court. If UES reviews this process, the reviewer should confirm billing is complete.

# PM Review

The Project Manager has the opportunity and the responsibility to review the information submitted to this point and to send it back to the contractor or other authority for revisions if it is incorrect or incomplete.

**Routing Assistance**

Please answer these questions to determine the path through the workflow.

| | |
|---|---|
| * Director Check: | Is Director Review required for this project?<br>○ Yes<br>○ No |
| * A/E Check: | Is there an A/E on this project?<br>○ Yes<br>○ No |
| * CX Check: | Was commissioning required on this project?<br>○ Yes<br>○ No |
| * TAB Check: | Was T&B required for this project?<br>○ Yes<br>○ No |
| * LNR Check: | Did this project alter the campus landscape or hardscape or have an exterior construction staging area?<br>○ Yes<br>○ No |
| * Training Check: | Was equipment added to this project which required owner training?<br>○ Yes<br>○ No |

**Routing Assistance** – as on the Start Step, these questions determine the path the process will take through the workflow. The contractor answered many of the questions previously and those answers will be filled in here, but if they are incorrect then the process has skipped necessary steps and the PM must change the answer and reroute it back through the workflow. This is done with the Reroute action. The PM shall also answer the Director Check question.

**Code Completion**

PM reviews and confirms receipt of Certificate of Completion / Occupancy and permit card.

| | |
|---|---|
| Contractor Confirms Project Completion. If Applicable CC/CO is Attached.: | |
| * PM Confirms Review of Certificate of Completion/Occupancy: | ○ Yes<br>○ Not Required. Project did not require a building permit. |
| Attach Certificate of Occupancy / Completion: | If you have a CO then the Substantial Completion process has to be complete prior to the start of the FCCO Process.<br>*Drag and drop file here*  or  **Browse e-Builder**   **Browse Computer** |
| Attach Permit Card: | *Drag and drop file here*  or  **Browse e-Builder**   **Browse Computer** |

**Code Completion** – the PM shall review and confirm receipt of the Certificate of Completion / Occupancy and permit card.

**As-Built Drawings**

| | |
|---|---|
| PM reviews and confirms receipt of complete contractor´s As-Built Drawings. | |
| Contractor Confirms Complete As-Built Drawings Are Attached: | |
| A/E Confirms Complete As-Built Drawings Are Attached and Reviewed: | |
| * PM Confirms As-Built Drawings are Attached & Complete: | ○ Yes<br>○ No. The project does not require As-Builts. |
| Attach As-Built Drawings: | *Drag and drop file here*  or  **Browse e-Builder**  **Browse Computer** |

**As-Built Drawings** – the PM shall review and confirm receipt of complete contractor´s As-Built Drawings.

**Record Documents**

| | |
|---|---|
| Project Manager reviews and confirms receipt of Record Documents, Specifications, and AoR Certificate of Final Completion. | |
| Attach Record Set of Drawings - CAD with XREFs: | *Drag and drop file here*  or  **Browse e-Builder**  **Browse Computer** |
| Attach Record Set of Drawings - Revit Final Model: | *Drag and drop file here*  or  **Browse e-Builder**  **Browse Computer** |
| Attach Record Set of Drawings - PDF: | *Drag and drop file here*  or  **Browse e-Builder**  **Browse Computer** |
| Attach Record Set of Drawings - Updated Specifications: | *Drag and drop file here*  or  **Browse e-Builder**  **Browse Computer** |
| Attach Architect's of Record Final Completion Certificate: | *Drag and drop file here*  or  **Browse e-Builder**  **Browse Computer** |
| * PM Confirms Record Documents/Specifications are Attached and Complete: | ○ Yes<br>○ Not Required. This project did not have an A/E. |

**Record Drawings** – the PM shall review and confirm receipt of Record Documents, Specifications, and Architect of Record Certificate of Final Completion.

**Punchlist**

| PM reviews completed punch-list and confirms that all punch-list tasks are complete. | |
|---|---|
| Contractor Confirms Punch-list is Complete and Attached: | |
| A/E Confirms Punch-list Completion: | |
| * PM Confirms Punch-list is Complete and Attached: | ○ Yes<br>○ Not Required. Owner accepted project without issue at first punch-walk. |
| Attach Completed Punch-list: | Drag and drop file here　or　**Browse e-Builder**　**Browse Computer** |

**Punchlist** – the PM shall review the completed punchlist and confirm that all punchlist tasks are complete.

**Commissioning**

| PM Reviews commissioning deliverables and confirms commissioning is complete. | |
|---|---|
| Contractor Confirms Commissioning is Complete: | |
| Attach Preliminary Cx Report & Completed Issues Log: | Drag and drop file here　or　**Browse e-Builder**　**Browse Computer** |
| Attach Final T&B Report Approved by EOR: | Drag and drop file here　or　**Browse e-Builder**　**Browse Computer** |
| Attach System Manual(s): | Drag and drop file here　or　**Browse e-Builder**　**Browse Computer** |
| Attach Letter in which EOR Confirms Commissioning is Complete.: | |
| Cx Agent Attaches Letter to EoR that Cx is Complete: | |
| UES Attaches Letter Confirming Cx is Complete: | |
| * PM Confirms Commissioning is Complete: | ○ Yes<br>○ Not Required |
| Attach Final Cx Report (if available): | Drag and drop file here　or　**Browse e-Builder**　**Browse Computer** |

**Commissioning** – the PM shall review commissioning deliverables and confirm that commissioning is complete.

**Assets**

| | |
|---|---|
| PM reviews Asset List and confirms all applicable assets are included. | |
| Contractor Confirms Asset List is Complete and Inclusive of All Assets on the Project: | |
| A/E Confirms Asset List is Complete and Inclusive of All Project Assets: | |
| * PM Confirms Asset List is Complete and Inclusive of All Assets on the Project: | ○ Yes  ○ Not Required. No changes to assets during project. |
| Attach Final Asset List: | *Drag and drop file here*  or  **Browse e-Builder**  **Browse Computer** |

**Assets** – the PM shall review the Asset List and confirm that all applicable assets are included.

**Manufacturer´s O&M and Warranties**

| | |
|---|---|
| PM reviews Operating and Maintenance information provided and confirms all appropriate O&Ms are included. | |
| Contractor Confirms All Manufacturer O&Ms and Warranties Are Attached and in Proper Format: | |
| A/E Confirms O&Ms Are Complete and Include All Equipment and Materials Installed on Project: | |
| * PM Confirms O&Ms and WTY Are Complete and Include All Equipment and Materials Installed on Project: | ○ Yes  ○ Not Required. No equipment or materials that require O&M Materials were installed during the project. |
| Attach Manufacturer O&M and Warranties: | *Drag and drop file here*  or  **Browse e-Builder**  **Browse Computer** |

**Manufacturer´s O&M and Warranties** – the PM shall review the Operating and Maintenance information provided and confirm that all appropriate O&Ms are included.

**Contractor´s Warranties**

| | |
|---|---|
| PM reviews and confirms all appropriate warranties have been provided and are in an acceptable format. | |
| Contractor Confirms Contractor Warranty(s) Are Attached and in Proper Format: | |
| * PM Confirms Warranties are Attached, Complete, and in Proper Format: | ○ Yes  ○ No. Revised to GC to request warranty. |
| Attach Contractors' Warranties: | *Drag and drop file here*  or  **Browse e-Builder**  **Browse Computer** |

**Contractor's Warranties** – the PM shall review and confirm that all appropriate warranties have been provided and are in an acceptable format.

**Owner´s Training**

PM reviews training information provided by contractor and confirms all appropriate training has been completed.

| | |
|---|---|
| Contractor Confirms Owner Training Complete and Training Materials Are Attached: | |
| A/E Confirms Owner Training is Complete and Training Materials Are Attached: | |
| Commissioning Agent Confirms Cx Training per Cx Plan is Complete: | |
| UES Confirms Cx Training is Complete per Cx Plan: | |
| * PM Confirms Owner Training is Complete and Training Materials Are Attached: | ○ Yes  ○ Not Required. No assets or equipment that required owner training were installed during this project. |
| Attach Training Schedule Matrix: | *Drag and drop file here*  or  **Browse e-Builder**  **Browse Computer** |
| Attach All Sign-In Sheets: | *Drag and drop file here*  or  **Browse e-Builder**  **Browse Computer** |
| Attach Training Videos (compress multiple files into one zip file): | *Drag and drop file here*  or  **Browse e-Builder**  **Browse Computer** |

**Owner's Training** – the PM shall review training information provided by contractor and confirm that all appropriate training has been completed.

**Landscape and Site Restoration**

| | |
|---|---|
| Contractor Confirms Site Restoration and Removal of Construction Equip.: | |
| * PM Confirms Site Restoration: | ○ Yes  ○ Not required. This project did not affect or damage the campus landscape or hardscape. |
| Photos of Site Area: | Please collect photos in a ZIP file.  *Drag and drop file here*  or  **Browse e-Builder**  **Browse Computer** |

**Landscape and Site Restoration** – the PM shall confirm that the construction site has been restored.

**Elevator Inspections and Certifications**

| PM confirms all elevator inspections are complete and elevator certificates have been posted in respective elevators. | |
|---|---|
| Contractor Confirms Inspection/Certification of Elevators: | |
| * PM Confirms Elevator Inspections and Certification: | ○ Yes<br>○ Not Required. Project did not include elevator scope. |
| Attach Elevator Inspections: | Drag and drop file here  or  **Browse e-Builder**  **Browse Computer** |
| Attach Confirmation From FO that Certificate Are Placed in Elevator(s): | Drag and drop file here  or  **Browse e-Builder**  **Browse Computer** |

**Elevator Inspections and Certifications** – the PM shall confirm that all elevator inspections are complete and elevator certificates have been posted in respective elevators.

**Correspondence & Evaluations**

| PM confirms that they have completed their section of applicable Contractor and A/E evaluations and uploaded relevant project correspondence. | |
|---|---|
| * PM Confirms Contractor Evaluation is Complete: | ○ Yes |
| * PM Confirms A/E Evaluation is Complete: | ○ Yes<br>○ Not Required |
| * PM Confirms Upload of Relevant Project Correspondence: | ○ Yes |

**Correspondence & Evaluations** – the PM shall confirm that they have completed their section of the applicable Contractor and A/E evaluations and uploaded project correspondence into the proper Documents module folder.

**Financial Information**

| PM indicates which internal vendors were supported by project funds that routed through FPC.<br>PM indicates method of payment of BCO and SFM Fees | |
|---|---|
| * PM Indicates Internal (UCF) Vendors on Paid Through Project: | Select all that apply. Only select if the internal vendor will receive funds from FPC. If internal vendor will bill the client directly, do not select.<br>☐ None<br>☐ BCO<br>☐ FO<br>☐ LNR<br>☐ OIR<br>☐ UCFIT<br>☐ UES<br>☐ UES Cx<br>☐ UES Utilities |
| * PM Indicates BCO Fee Payment Method: | ○ No BCO Fees. This project did not require a building permit.<br>○ Building permit fees were included in the contractor's or A/E proposal (PO) and the Contractor or A/E paid BCO directly for permit fees<br>○ Building permit fees were excluded from the contractor's or A/E proposal and FPC / FSBO is responsible to pay BCO Fees related to this project. |
| * PM Indicates SFM Payment Method: | ○ No SFM Fees. This project did not require a State Fire Marshall Permit.<br>○ SFM permit fees were included in the contractor's proposal (PO). Contractor or A/E paid SFM directly for SFM Fees<br>○ SFM permit fees were excluded in the contractor's proposal. FPC / FSBO is responsible to pay SFM Fees related to this project. |

**Financial Information** – the PM shall indicate which internal vendors were supported by project funds that routed through FPC and indicate the method of payment of BCO and SFM fees.

**Keys Review**

| | |
|---|---|
| PM confirms key access for contractor will be terminated upon completion of FCCO process. | |
| * PM Confirms Key Access Will be Terminated Upon Sign Off of FCCO Process: | ○ Yes |

**Keys Review** – the PM shall confirm that key access for the contractor will be terminated upon completion of the FCCO process. FCCO will automatically send an e-mail to the appropriate department that will request key access termination at the appropriate time. No further action on this matter is needed after this step.

**LEED Certification**

| | |
|---|---|
| Does the Project Qualify for LEED Certification?: | |
| A/E Confirms LEED Application is Complete and Submitted: | |
| * PM Confirms If Project Qualifies for LEED Certification: | ○ Yes<br>○ No. Project was not designed to meet LEED certification. |
| Attach Confirmation of LEED Application Submission: | |

**LEED Certification** – the PM shall confirm if the project qualifies for LEED certification.

# FO Training Sign-Off

This step is required if training was required.

**Owner´s Training**

Facilities Operations representative confirms that agreed upon Owner Training is complete and confirms the documents provided reflect the completed training.

| | |
|---|---|
| Contractor Confirms Owner Training Complete and Training Materials Are Attached: | |
| A/E Confirms Owner Training is Complete and Training Materials Are Attached: | |
| PM Confirms Owner Training is Complete and Training Materials Are Attached: | |
| Commissioning Agent Confirms Cx Training per Cx Plan is Complete: | |
| UES Confirms Cx Training is Complete per Cx Plan: | |
| Attach Training Schedule Matrix: | |
| Attach All Sign-In Sheets: | |
| Attach Training Videos (compress multiple files into one zip file): | |
| * FO Confirms Owner Training is Complete and Training Materials Are Attached: | ○ Yes<br>○ Not Required. No equipment or systems which required Owner´s Training was installed during project. |

**Owner's Training** – a Facilities Operations representative shall confirm that agreed-upon Owner Training is complete and confirm the documents provided reflect the completed training.

# LNR Review

This step is required if construction site restoration was required.

**LNR Review**

LNR Representative reviews site photos or otherwise confirms restoration of the construction site area landscape and hardscape.

LNR Representative reviews LNR workorders related to the project and ensures they have been billed out.

| | |
|---|---|
| Contractor Confirms Site Restoration and Removal of Construction Equip.: | |
| PM Confirms Site Restoration: | |
| Photos of Site Area: | Please collect photos in a ZIP file. |
| * LNR Confirms the Construction Site Area is Restored.: | ○ Yes |
| * LNR Representative Confirms LNR-Billing is Complete for this Project: | ○ Yes ⦿ LNR did not review |

**LNR Review** – a LNR Representative shall review site photos or otherwise confirms restoration of the construction site area landscape and hardscape. LNR representative should review that all project-related, LNR work orders have been billed. The option "LNR did not review" is a default in the case that LNR did not have scope on this project and the process did not come to their court. If LNR reviews this process, the reviewer should confirm billing is complete.

# Asset Management Review

**Assets**

Asset Management representative: Review the attached asset list. Ensure it is filled out with all required information.Confirm Review. If satisfied, approval authorizes the sharing of documents via change request in AiM. If Asset Management representative is not satisfied with documents, revise to contractor with comment.

| | |
|---|---|
| Contractor Confirms Asset List is Complete and Inclusive of All Assets on the Project: | |
| A/E Confirms Asset List is Complete and Inclusive of All Project Assets: | |
| PM Confirms Asset List is Complete and Inclusive of All Assets on the Project: | |
| * Asset Mgmt. Confirms Asset List is Complete and Ready for Upload to AiM: | ○ Yes<br>○ Not Required. There were no changes to assets during this project.<br>○ No. Returning process to initiator with comment. |
| Attach Final Asset List: | |

**Assets** – the Asset Management representative shall review the attached asset list, ensure it is filled out with all required information, and, if satisfied, acknowledge that approval authorizes the sharing of documents via change request in AiM. If the Asset Management representative is not satisfied with documents, they shall revise to contractor with comment.

**Contractor´s Warranties**

Review the warranty submittals. Ensure all warranties provided have a start and end date and signature, if applicable. Confirm warranties are complete. If satisfied, approval authorizes the sharing of documents via change request in AiM. If Asset Management representative is not satisfied with documents, revise to contractor with comment.

| | |
|---|---|
| Contractor Confirms Contractor Warranty(s) Are Attached and in Proper Format: | |
| PM Confirms Warranties are Attached, Complete, and in Proper Format: | |
| * Asset Mgmt Confirms Contractor Warranties are Complete and in Proper Format: | ○ Yes<br>○ No. Returning to initiator with comment. |
| Attach Contractors' Warranties: | |

**Contractor's Warranties** – the Asset Management representative shall review the warranty submittals and ensure all warranties provided have a start and end date and signature, if applicable. Confirm warranties are complete and, if satisfied, acknowledge that approval authorizes the sharing of

documents via change request in AiM. If the Asset Management representative is not satisfied with documents, they shall revise to contractor with comment.

**Manufacturer´s O&M and Warranties**

Asset Management Representative: Review the O&M submittals. Confirm complete. If satisfied, approval authorizes the sharing of documents via change request in AiM. If Asset Management representative is not satisfied with documents, revise to contractor with comment.

| | |
|---|---|
| Contractor Confirms All Manufacturer O&Ms and Warranties Are Attached and in Proper Format: | |
| A/E Confirms O&Ms Are Complete and Include All Equipment and Materials Installed on Project: | |
| PM Confirms O&Ms and WTY Are Complete and Include All Equipment and Materials Installed on Project: | |
| * Asset Management Confirms Review of MFG O&M and WTY. O&M is Complete and Ready for Upload to CMMS: | ○ Yes<br>○ Not Required. This project did not alter equipment or materials that required O&M submittal.<br>○ No. Returning the process to initiator with comment. |
| Attach Manufacturer O&M and Warranties: | |

**Manufacturer´s O&M and Warranties** – the Asset Management Representative shall review the O&M submittals and confirm that they are complete. If satisfied, approval authorizes the sharing of documents via change request in AiM. If the Asset Management Representative is not satisfied with the documents, they shall revise to contractor with comment.

The remaining sections – **As-Built Drawings**, **Record Set**, and **Owner's Training** – are present for reference but do not require further interaction.

# Project Close-out Specialist Review

**Project Closeout Review**

Project Closeout Specialist:

1. Complete AiM Change Request to share documents with Asset Management. Enter the date this is complete.

2. Complete your portion of the Contractor and A/E Evaluation Process

3. Review FSBO Financial Summary eBuilder Cost Module and Peoplesoft to identify any open purchase orders or internal commitments.

4. Verify that all work order phases (except the initial work order phase) are closed. Identify closed billable work order phases and write them in the spaces provided so that FSBO can follow up to verify they have been approved and paid.

5. You may only forward this process onto FSBO once you have confirmed the following:

    a. Purchase Orders are closed or if there is an open PO it has already been submitted by the contractor or A/E. If you notice a PMT process is in an FPC employee's court nudge them to move it along.

    b. All AiM work orders are closed

    c. Any non-approved commitments (review cost module) are understood. Discuss with PM to investigate any open commitments. If billing is expected then contact internal or external vendor to obtain invoice.

6. Review information about permit fee payment method and internal vendors and then verify if internal vendors, BCO and SFM show as expenditures on the Financial Summary.

7. Once you are ready to send the process to FSBO, fill in the "Date Close-out Review Complete," then click reviewed and take action.

| | |
|---|---|
| Date Project Entered Close-out: | |
| UES Representative Confirms UES Billing on this Project is Complete: | |
| LNR Representative Confirms LNR-Billing is Complete for this Project: | |
| PM Indicates BCO Fee Payment Method: | |
| PM Indicates SFM Payment Method: | |
| PM Indicates Internal (UCF) Vendors on Paid Through Project: | Select all that apply. Only select if the internal vendor will receive funds from FPC. If internal vendor will bill the client directly, do not select.<br>None |
| * Enter Date of AiM Change Request that Provides Project Documents to Asset Management: | [ ] 🗓 |
| * Project Close-out Specialist Confirms Contractor Evaluation Complete: | ○ Yes |
| * Project Closeout Specialist Confirms the A/E Evaluation is Complete: | ○ Yes<br>○ Not Required |
| * PCOS Confirms all POs are Closed or Related Invoices Are in FSBO Court for Payment: | ○ Yes |
| * PCOS Confirms All AiM Billable Work Orders Are Closed: | ○ Yes<br>○ No. There were no billable work orders on this project. |
| * PCOS Provides Billable Work Order Numbers: | [                    ] |
| * Date Project Closeout Review Complete: | [ ] 🗓 |

**Project Close-out Review** – the Project Close-out Specialist shall:

1. Complete the AiM Change Request to share documents with Asset Management and then enter the date this is complete.
2. Complete the designated portion of the Contractor and, if applicable, A/E Evaluation surveys.
3. Review the e-Builder project cost module and PeopleSoft to identify any open purchase orders or internal commitments.
4. Verify that all work order phases (except the initial work order phase) are closed. Identify closed billable work order phases and write them in the spaces provided so that FSBO can follow up to verify they have been approved and paid.
5. Only forward this process onto FSBO after confirming the following:
   a. Purchase orders are closed or if there is an open PO it is already in FSBO court for payment. A PMT process is in an FPC employee's court can be nudged to move it along.
   b. All AiM work orders are closed.
   c. Any non-approved commitments (review in the cost module) are understood. Discuss with the PM to investigate any open commitments. If billing is expected then contact internal or external vendor to obtain invoice.
6. Review information about permit fee payment method and internal vendors and then verify if internal vendors, BCO and SFM show as expenditures on the Financial Summary.
7. Once ready to send the process to FSBO, fill in the "Date Sent to FSBO," then click Reviewed and take action.

**FSBO Returns to Project Closeout Specialist**

Project closeout specialist:

This section will be completed by FSBO in the event that there was an obstacle to closure when the project arrived to their court. Take action to close any remaining POs, obtain PM approval on work orders and any other issues. Once all issue are resolved, return the process to FSBO.

If you confirm, that an open PO (not already in their court) or an internal vendor had not **billed** was the issue, please alter the "date sent to FSBO" to reflect the new date you send the process back to FSBO. If the issue is billed work orders that are not paid, the original date should remain.

| | |
|---|---|
| FSBO Confirms BCO is Paid: | |
| FSBO Confirms SFM Fees are Paid: | |
| FSBO Confirms All POs Are Closed: | |
| FSBO attaches Financial Summary with open Billing / POs: | |
| Email from FSBO requesting PM approval of WOs: | |
| FSBO Confirms All Billed Work Orders Are Paid: | |
| FSBO Confirms Transfer of PMS Fees: | |

| | |
|---|---|
| PM Confirms Contractor Evaluation is Complete: | |
| PM Confirms A/E Evaluation is Complete: | |

**FSBO Returns To Project Close-out Specialist** - This section will be completed by FSBO in the event that there was an obstacle to closure when the project arrived to their court. Take action to close any remaining POs, obtain PM approval on work orders and any other issues. Once all issues are resolved, return the process to FSBO.

If confirmed that an open PO (not already in their court) or an internal vendor had not billed was the issue, please change the "date sent to FSBO" to reflect the new date you send the process back to FSBO. If the issue is billed work orders that are not paid, the original date should remain.

The remainder of the page sections are provided for reference if necessary.

# Director Review

If necessary, the various F&S Directors will review the FCCO at this step.  It is not usually required.

**Reviewer Log**

The following personnel have reviewed the final close-out materials on the listed dates.

| | | | |
|---|---|---|---|
| A/E Reviewer: | Samantha eBAdmin Mason | A/E Reviewed Date: | 03.05.2020 |
| CX Agent Reviewer: | Samantha eBAdmin Mason | CX Agent Reviewed Date: | 03.05.2020 |
| A/E Reviewer of T&B Report: | Matthew Green | A/E Reviewed T&B Report Date: | 03.02.2020 |
| UES Reviewer: | Samantha eBAdmin Mason | UES Reviewed Date: | 03.05.2020 |
| PM Reviewer: | Samantha eBAdmin Mason | PM Reviewed Date: | 03.05.2020 |
| FO Training Reviewer: | Samantha eBAdmin Mason | FO Training Reviewed Date: | 03.05.2020 |
| LNR Reviewer: | Samantha eBAdmin Mason | LNR Reviewed Date: | 03.05.2020 |
| Asset Management Reviewer: | Samantha eBAdmin Mason | Asset Management Reviewed Date: | 03.05.2020 |
| Closeout Specialist Reviewer: | Samantha eBAdmin Mason | Closeout Specialist Reviewed Date: | 03.06.2020 |

This project is under review for Final Completion and requires your review and approval. Please take a moment to review any of the provided documents of interest to you. **To recommend this project for final completion choose "Approved" from the drop-down menu and then select "Take Action."** Otherwise, you may choose "Revise to PM" with comment, specifying your concerns.

We understand competing demands on your time and estimate this review to take less than 15 minutes.

If you require any assistance with eBuilder, contact Samantha Mason or Matt Green.

**Reviewer Log** – this section lists the names of each person who reviewed the previous steps of the FCCO process along with the date of review.  It is provided for reference.  At this stage the project is under review for Final Completion and requires the Directors' review and approval. A Director should review any of the provided documents of interest. **To recommend this project for final completion choose "Approved" from the drop-down menu and then select "Take Action."** Otherwise, choose "Revise to PM" with comment, specifying any concerns.

# Payment Notice

This step is intended for the PM to see and acknowledge.

> The project has cleared all final reviews.  Approve final pay apps in your court now, then Take Action on this page to continue moving the FCCO process along.

At this point in the FCCO process the PM should approve any final pay apps waiting in their eB court and then, once that is done, take action on this step.  No further input or review is required.

# FSBO Confirms Final Payment

This step is intended for FSBO to view and acknowledge.

This is a place-holding step for the FCCO process. The process will wait here until FSBO can verify that the final invoice associated with the FCCO submitting contractor and reviewing A/E have been issued payment for their final invoice. If there are any unforeseen issues to be resolved FSBO may send the process back to the PM. Once final payment has been issued, FSBO will select "yes" to move the project to financial closure.

| * FSBO Confirmation: | FSBO confirms final payment has been issued to the vendor? |
|---|---|
| | ○ Yes |

# FSBO Financial Close-out

**FSBO Financial Review**

FSBO reviewer reviews and answers ALL questions below. If after complete review, there are obstacles to project financial closure that require project closeout specialist attention, the process is returned to project closeout specialist with current financial summary and comment specifying issues.

If there are no obstacles for project financial closure the FSBO review continues to the next section.

| | |
|---|---|
| **\* FSBO Confirms All POs Are Closed:** | ○ Yes. <br> ○ No. Returning process to project closeout specialist with comment and attached current financial summary. |
| **FSBO attaches Financial Summary with open Billing / POs:** | *Drag and drop file here*   or   **Browse e-Builder**   **Browse Computer** |
| **\* FSBO Confirms All Billed Work Orders Are Paid:** | ○ Yes <br> ○ No. Requesting assistance from PCOS to facilitate PM approval of some work orders. Email requesting PM approval of work orders attached below. Check comments for unpaid work orders. |
| **Email from FSBO requesting PM approval of WOs:** | *Drag and drop file here*   or   **Browse e-Builder**   **Browse Computer** |
| **\* FSBO Confirms BCO is Paid:** | ○ Yes. <br> ○ No building permit fees routed through FSBO/FPC. |
| **\* FSBO Confirms SFM Fees are Paid:** | ○ Yes <br> ○ No SFM Fees routed through FSBO/FPC. |
| **\* FSBO Confirms Transfer of PMS Fees:** | ○ Yes <br> ○ No. PMS Fees were not budgeted for this project. |

**FSBO Financial Review** - the FSBO reviewer shall review and answer all listed questions. If after complete review, there are obstacles to project financial closure that require project close-out specialist attention, the process is returned to project close-out specialist with the current financial summary and a comment specifying issues.

**FSBO Financial Closeout**

Once owner savings has been returned and project has been closed, a FINAL financial summary is attached and the process is forwarded to Project Coordinator for final project review / completion.

| | |
|---|---|
| **\* FSBO Confirms Owner's Savings Returned to Funding Department:** | ○ Yes <br> ○ No Owner's Savings |
| **\* FSBO_confirms project financials are closed.:** | ○ Yes. Upload FINAL financial summary. |
| **\* FSBO Uploads Final Financial Summary:** | *Drag and drop file here*   or   **Browse e-Builder**   **Browse Computer** |

**FSBO Financial Close-out** - once owner savings has been returned and project has been closed, a FINAL financial summary is attached and the process is forwarded to Project Coordinator for final project review / completion.

# Project Coordinator Review

**Project Coordinator Review**

Project Coordinator:

1. Reconciles eBuilder Cost Summary against FSBO Financial Summary. Enters data for for any match exceptions.

2. Updates Project tracker cost data for any pre-FY20 projects.

3. Verifies all project expenses were paid and all documents were received, named appropriately and filed correctly.

4. Confirms all project surveys are complete.

5. Verifies project details page is updated and accurate.

- Changes Status to Completed

- Enters Date Completed

| | |
|---|---|
| * Coordinator Reconciles FSBO Financial Summary with eBuilder Cost Summary: | ○ Yes <br> ○ Pending. Return to FSBO with comment for action. |
| * Coordinator Confirms Project Surveys Are Complete: | ☐ Contractor evaluation survey is complete <br> ☐ Architectural Engineer survey is complete <br> ☐ Client project closeout survey in complete |
| * Date Project Completed and Financially Reconciled: | |

**Project Coordinator Review** – the Project Coordinator shall:

- Reconcile e-Builder Cost Summary against FSBO Financial Summary. Enter data for any match exceptions.
- Update Project Tracker cost data for any pre-FY20 projects.
- Verify all project expenses were paid and all documents were received, named appropriately, and filed correctly.
- Confirm that all project surveys are complete.
- Verify project details page is updated and accurate.
    - Change Status to Completed
    - Enter Date Completed

The remaining sections on the page are provided for reference, if needed.

# Archivist Review

**As-Built Drawings**

| | |
|---|---|
| PM Confirms As-Built Drawings are Attached & Complete: | |
| Attach As-Built Drawings: | [ ] |
| * Archivist Confirms As-Built Drawings are Archived: | ○ Yes<br>○ Not Required. As-Built Drawings were not provided / required for the project. |

**Record Documents**

| | |
|---|---|
| PM Confirms Record Documents/Specifications are Attached and Complete: | |
| Attach Record Set of Drawings - CAD with XREFs: | [ ] |
| Attach Record Set of Drawings - Revit Final Model: | [ ] |
| Attach Record Set of Drawings - PDF: | [ ] |
| Attach Record Set of Drawings - Updated Specifications: | [ ] |
| * Archivist Confirms that Record Documents and Specifications are Archived: | ○ Yes<br>○ Not Required. Record Drawings were not Provided / Required for this Project. |

**As-Built Drawings** – The Archivist will download the attached drawings and archive them in the Archive folder on the FP&C file system, then confirm that this has been done.

**Record Documents** – the Archivist will download the attached record documents and archive them in the Archive folder in the FP&C file system, then confirm that this has been done.

# Space Administration Review

**Space Administration Receives Drawings**

Space Admin downloads desired drawings and confirms receipt.

| | |
|---|---|
| PM Confirms As-Built Drawings are Attached & Complete: | ○ Yes<br>○ No. The project does not require As-Builts. |
| PM Confirms Record Documents/Specifications are Attached and Complete: | ○ Yes<br>○ Not Required. This project did not have an A/E. |
| Attach As-Built Drawings: | |
| Attach Record Set of Drawings - CAD with XREFs: | |
| Attach Record Set of Drawings - Revit Final Model: | |
| Attach Record Set of Drawings - PDF: | |
| Attach Record Set of Drawings - Updated Specifications: | |
| * Space Administration Confirms Receipt of Drawings: | ○ Yes<br>○ Not Required. This project did not have As-Built Drawings or Record Drawings. |

**Space Administration Receives Drawings** – the Space Administration representative shall download the attached drawings and archive them in the location of their choice, then confirm that the drawings have been received.

Once this is complete, the FCCO process is complete and the project is closed.