

# Project Closeout Checklist

**For ALL Capital projects. To be managed by PM. PM to meet with CM to review and mark off N/A items.**

Project Number and Name \_\_\_\_\_  
NCH PM \_\_\_\_\_ NCH CM \_\_\_\_\_

**Milestone Dates - See Project Closeout Deliverables lists for docs required on each date**

**1. Early Deliverable Turnover (EDT)** – how early to be based on size/nature of project. **DATE** \_\_\_\_\_

*This is documentation NCH needs early to begin updating master databases to be complete before spaces are turned over. Any change to deliverables after turnover is to be revised, tracked as a change, and resubmitted to NCH.*

**2. Substantial Completion (SC) - Construction Turnover** **DATE** \_\_\_\_\_

*This is generally when the C of O or TCO has been received, construction is mostly (substantially) complete, and NCH can begin fitup. OPS may take over water management at this point, but NCH CM should confirm with OPS. Any remaining construction happening after Substantial Completion (punch list and day-2 items) should be tracked by the PM on a Rolling Completion List, with due dates and assignments.*

- CM 1. Building orientation/training for OPS, Protective Services, Safety COMPLETE
- PM 2. Insurance change from Builders Risk to Property (notify Legal) COMPLETE
- CM 3. Door lock cores turned from construction to final - confirm contractor COMPLETE small to med project keys
- 4. Master Database updates (by Facility Documentation Team) COMPLETE
- FDT • Master drawings (PNUTs, One Lines, SOC's)
- FDT • Archibus
- FDT • TMA (room numbers and maintainable assets)
- FDT • Valve tag list
- FDT • Project Closeout Deliverables placed in EDOCS

**3. Occupancy - Go Lives, Move-in or Patient Care start** **DATE** \_\_\_\_\_

*This is when occupants begin to move into the building or area. ICRA/PCRA policies for any ongoing work begins, OPS begins to receive/manage TMA repair workorders and manage warranty items*

- CM 1. Punchlist work - confirm contractor COMPLETE
- CM 2. Final pre- go-live clean (or clinical clean if required) COMPLETE
- 3. Final pre-go-live walkthroughs, any remedies COMPLETE
- CM • Safety (all areas)
- CM • Epidemiology (patient care areas/sites only)
- CM • Clinical (patient care areas/sites only)
- CM 4. Special Testing (Air, Water cultures as required for specialty areas – confirm Epi COMPLETE
- CM 5. EVS final clean, stocking COMPLETE
- 6. Access Control changes COMPLETE
- PM • Keys distributed to occupants (key meeting led by PM during design, PM requests keys from OPS)
- PM • Card reader access list updates (notify occupant to request from Protective Services)
- PM 7. Spaces Vacated? Notify Ops, Interiors, Construction Purchasing, Protective Services & EVS

**4. Final Completion (FC) - Contractor Demobilizes, Project Closes** **DATE** \_\_\_\_\_

*This is when all remaining "day-2" work is complete, contractor has left building, project can be closed*

- PM 1. Receipt of all Project Closeout Deliverables COMPLETE
- PM 2. All invoices and final retention paid, finance COMPLETE
- PM 3. Receipt of all Attic stock (IF required) COMPLETE

**5. 11 Month Warranty Walk - led by CM, include PM, OPS (Medium and large projects)** **DATE** \_\_\_\_\_

## Project Closeout Deliverables – from A&E (Obtained by NCH PM)

Required after each phase of construction

Deliverable	Format	Notes	Due	Date Received	Date Approved
<b>A. System Updates</b>	PDF	A&E to markup NCH supplied One Line System drawings	EDT		
<b>B. Room List</b>	Excel	List of room number, department, category, and type.	EDT		
<b>C. CAD Floor Plan Backgrounds</b>	DWG	These are basic drawings used to update the Facility Management Systems. Only these items provided on separate layers. <ul style="list-style-type: none"> <li>○ Walls (external, internal, cubicles)</li> <li>○ Doors</li> <li>○ Glazing</li> <li>○ Rooms (names and numbers)</li> <li>○ Plumbing (sinks, toilets)</li> <li>○ Simplified structural</li> <li>○ Outline of major equipment</li> <li>○ Simple counter tops</li> </ul>	EDT		
<b>D. Record Drawings</b> PDF Title Format: BLDG Floor Level-Discipline Sequence-2 Digit Year of Occupancy Floor Plan Example: A04-A100-13	PDF, DWG, Revit	A&E incorporates bulletins and as-built markups. Separate PDF of each sheet. Single combined PDF of all sheets. All final CAD base files (floor, ceiling plans)	FC		
<b>E. Record Specs</b> PDF Title Format: BLDG Floor Level-Year-Division Description_SPEC Floor Plan Example: A04-13-Record_SPEC	PDF	Single combined PDF	FC		
<b>F. Punch List</b>	Excel	List of any work not completed or not completed correctly.	SC		

## Project Closeout Deliverables – from Contractor (Obtained by NCH CM)

Required after each phase of construction

Deliverable	Format	Notes	Due	Date Received	Date Approved
<b>A. Project Contacts</b>	Excel	All primes and subs (Company, Person, Title, Email, Phone)	EDT		
<b>B. Maintainable Assets and Valve Tags</b> (Must use NCH Template "NCH Maintainable Assets List_MAL TEMPLATE" only)	Excel	All removed/added/changed equipment, valve tags must be reserved ahead of time with the CC.	EDT		
<b>C. System Training</b> Title Format: BLDG Floor Level-Year-System Description TRAINING Example: AB07-22-Generator Operation TRAINING	PDF	Reference docs provided at time of training. AE review with NCH OPS based on in-scope systems	EDT		
<b>D. Warranties</b> Title Format: BLDG Floor Level-Expiration Date-Description_WARRANTY Example: A04-13-Restaurant Partitions_WARRANTY	PDF	Separate PDF of each warranty. Review specs for extended warranties	SC		
<b>E. Testing Results</b> PDF Title Format: BLDG Floor Level-Year-Description_TESTING Example: A04-13-Air Balance TESTING	PDF	Commissioning reports	SC		
	PDF	Equipment startup	SC		
	PDF	TAB reports: water mgmt, med gas, HVAC & CW balance reports	SC		
	PDF	IS data test results	SC		
	PDF	Electrical coordination study (if required)	SC		
	PDF	Glycol test results	SC		
	PDF	Final water samples Coliform bacteria testing (i.e. OPC required.)	SC		
	PDF	Legionella test results (CM coord timing based on go-live.)	SC		
<b>F. Building Automation Graphics</b>			SC		
<b>G. Fire Alarm Graphics</b>			SC		
<b>H. O&amp;M Manuals</b> Title Format: BLDG Floor Level-Year-Description_O&M Example: A04-13-Restaurant Partitions_O&M	PDF	Separate PDF of each O&M section	FC		
<b>I. As-Built Drawings</b> Title Format: Project Number_Discipline_AS BUILT Example: A1-19-138_Combined_AS BUILT	PDF	Single combined PDF	SC		
<b>J. Approved Submittals</b> PDF Title Format: BLDG Floor Level-Year-Division Description_SUBMITTAL Example: A04-13-092100 Gypsum Board_SUBMITTAL	PDF	Separate PDF of each submittal with approval stamps. Submittal Log as basis to assure all are received	SC		