CAMP
Construction & Architecture Management Platform

Closeout Items Training Guide
Date Created: 3/7/2023
Date Updated: 3/24/2023

Contents

About

Closeout is a log that tracks information that must be provided by the GC to SCA before closeout of the contract. Typically, information includes warranties, guarantees, operations and maintenance manuals, manufacturers maintenance instructions, and training materials.

The entire closeout log must be approved before the workflow for each individual item can begin. Each item must be routed through the workflow and in the "Ready for Transfer" status to be included in Partial, Special or Full Transfers. Closeout items are not included in the Substantial Transfer Package.

Default items are also included within the Closeout Items app and will be generated with the other items. The PO can attach documents to the default items and add them to Transfers.

Process Overview

At the start of the project when the CSI Codes are identified, the GC will generate the closeout log with items from the closeout master list. The GC will be responsible for reviewing the list that is automatically created using information from the projects CSI Codes.

The entire log will be accepted by the GC, PO and CR. After the GC has acknowledged the complete log, they can begin to provide details and attachments for each item.

After the GC attaches the required information to an item, it will go to the PO. When the PO approves, the item is ready to transfer. If a Partial, Special or Full transfer is created, this item can be included.

Default items will also be created when the closeout log is generated, allowing the PO to attach documents for required default items.
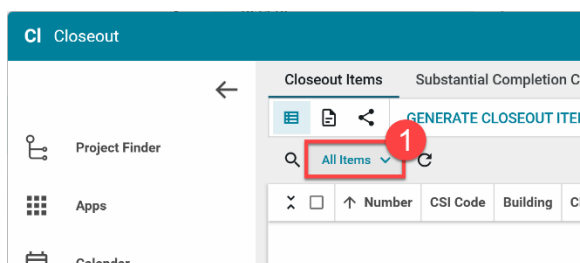
During a Partial Transfer, the BR will review the item as part of the Transfer workflow. During a Special or Full Transfer, the CR will review the item as part of the Transfer workflow. Please see *Transfer Appendix A – Closeout Items* Review for more information on the review process.
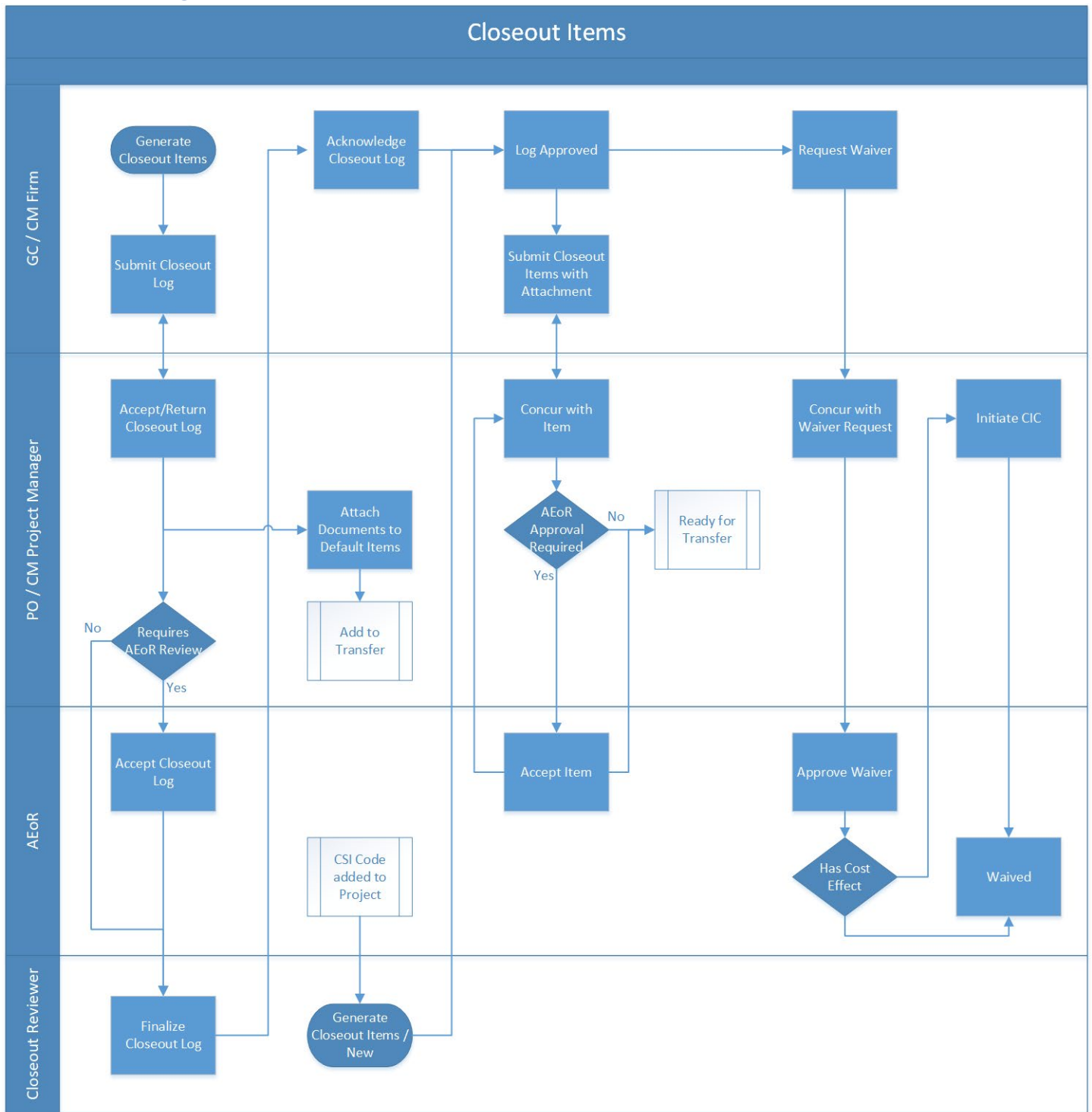
Notes

There are indicators that appear on the left-hand side of each closeout item to show the current item status.

CL-0003	Red	Item is not applicable or waived
CL-0004	Green	Item is ready for transfer, or in a transfer already.
CL-0008	Orange	Item is currently in progress of a workflow.
CL-0014	Blue	Item has documents attached in the references.

The closeout app has selectable filters that can be used to only show relevant items.

Workflow Diagram

Closeout Items

GC / CM Firm

- Generate Closeout Items
- Submit Closeout Log
- Acknowledge Closeout Log
- Log Approved
- Submit Closeout Items with Attachment
- Request Waiver

PO / CM Project Manager

- Accept/Return Closeout Log
- Attach Documents to Default Items
- Add to Transfer
- Requires AEoR Review — No / Yes
- Concur with Item
- AEoR Approval Required — No / Yes
- Ready for Transfer
- Concur with Waiver Request
- Initiate CIC

AEoR

- Accept Closeout Log
- CSI Code added to Project
- Accept Item
- Approve Waiver
- Has Cost Effect
- Waived

Closeout Reviewer

- Finalize Closeout Log
- Generate Closeout Items / New

Please see *Transfers – CAMP End User Training Guide* for more information on the to be taken after the closeout items are Ready for Transfer.

Step-by-Step Instructions
GC Generates Closeout Items
Based on existing CSI Codes in the project.

1. Go to **Project Finder**> Navigate to the desired project
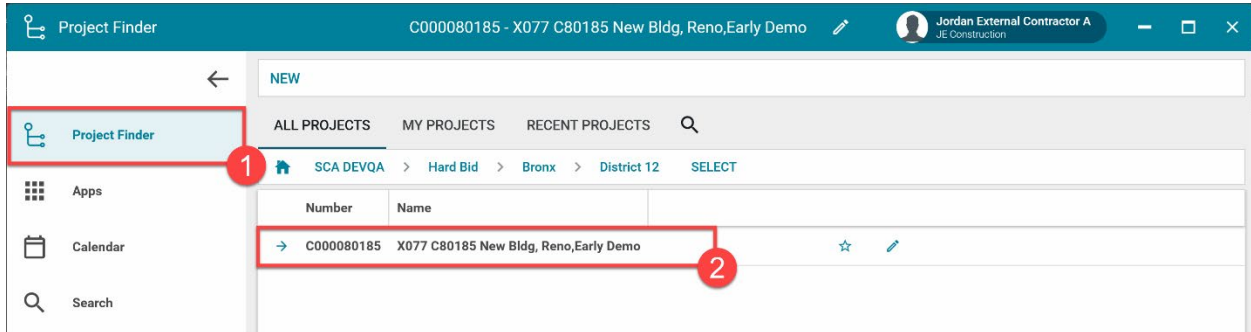
2. Go to **Apps** > **All Apps**> Click **Closeout**
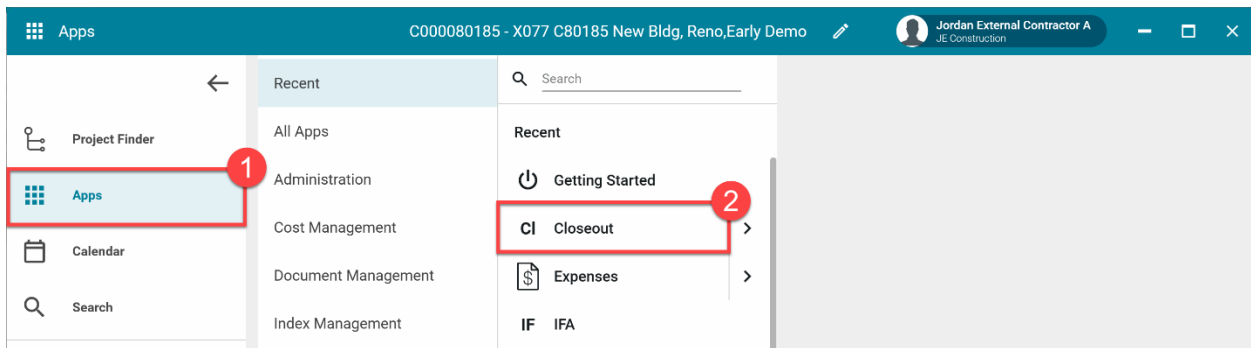
3. In the **Closeout Items** tab, click **GENERATE CLOSEOUT ITEMS** at the top
4. Click **Generate Closeout Items** to confirm
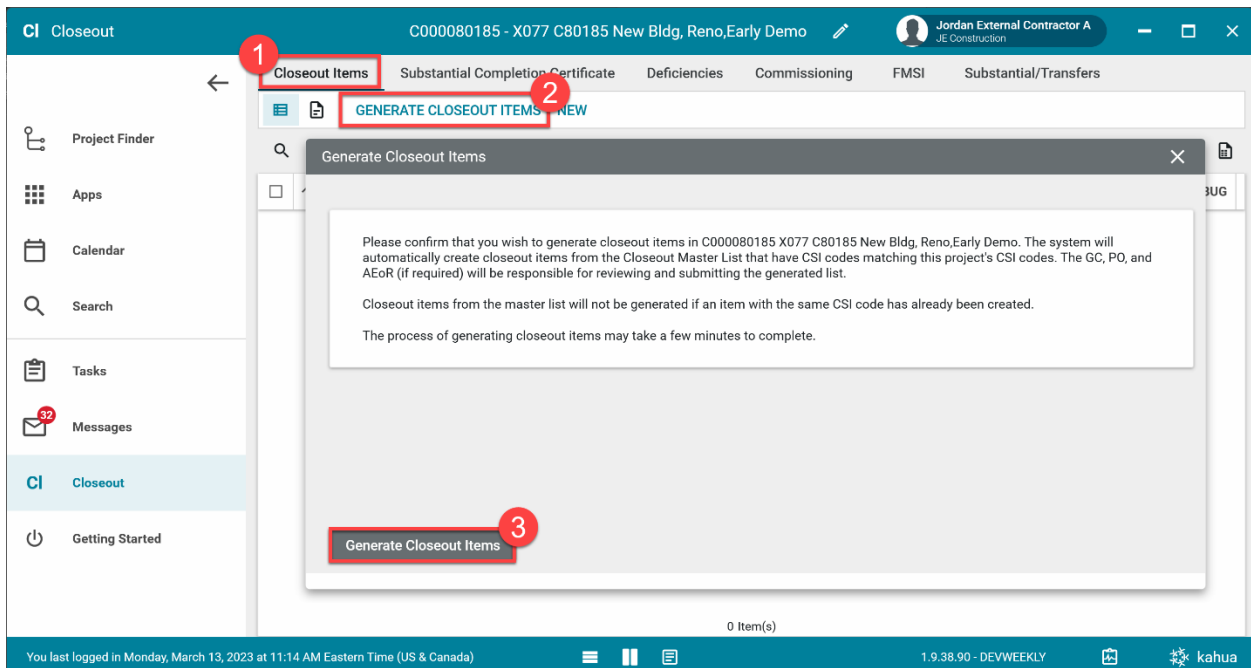
5. Click **All Items (View)** menu and select **Closeout Items** from the drop down menu to view the list.
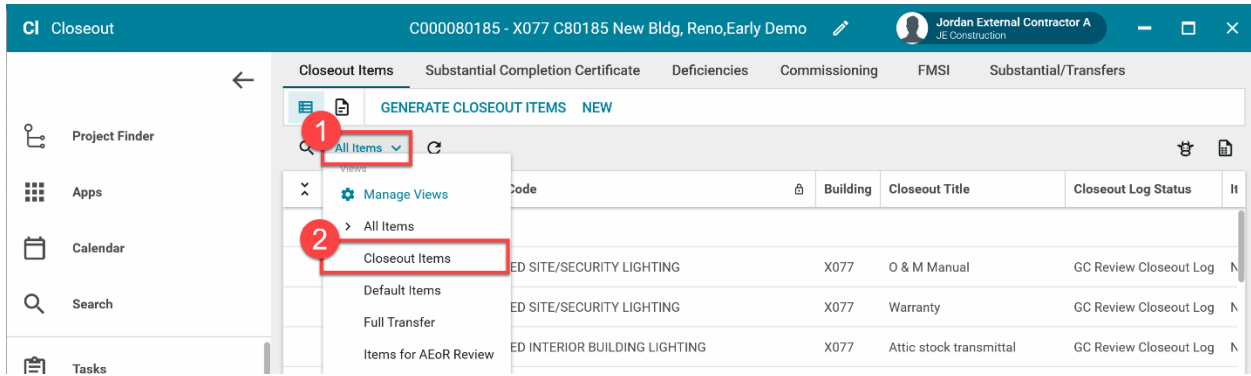
Notes:
- In Requirements projects, you will be prompted to select a Borough as well.
- The system might take a few minutes to generate closeout items for any newly added CSI Codes.
- If the PO adds items after the list was generated, you can come back and click **GENERATE** again to refresh, then complete the process for those items. Sort by the **Status** column to see what's new.

GC Submits Closeout Log

1. You must select **any closeout item** (do not use checkboxes) to move to the next step

2. Click **SUBMIT CLOSEOUT LOG** at the top
3. Enter **comments** (optional unless PO returned log)
4. Click **Submit Log**
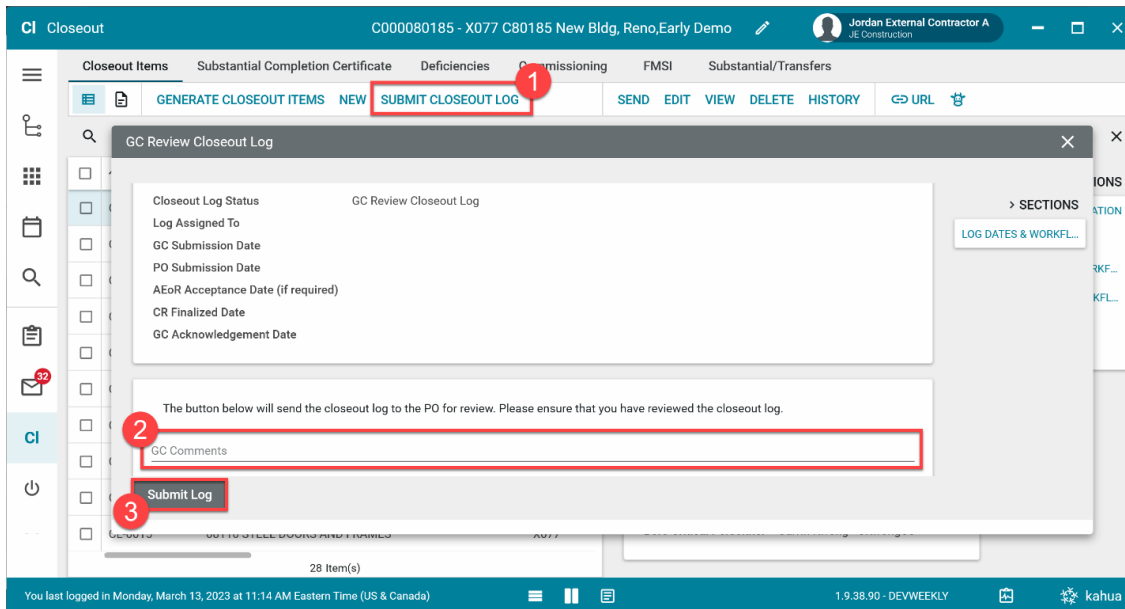
PO Options:

PO Creates a New Closeout Item

1. In the Closeout Items tab, Select **NEW**
2. **Details** section:
   a. Select the **CSI Code** from the drop down menu
   b. Enter a **Closeout Title**

3. Click **Save / Close**

PO Creates a New Default Item

1. Select NEW > Select the CSI Code **CL-DFLT**
2. Select a Document Type (Closeout Title will be autofilled)

3. **Comments** (optional)

4. **References**: Click **Upload** to attach documents
5. Click **Save / Close**
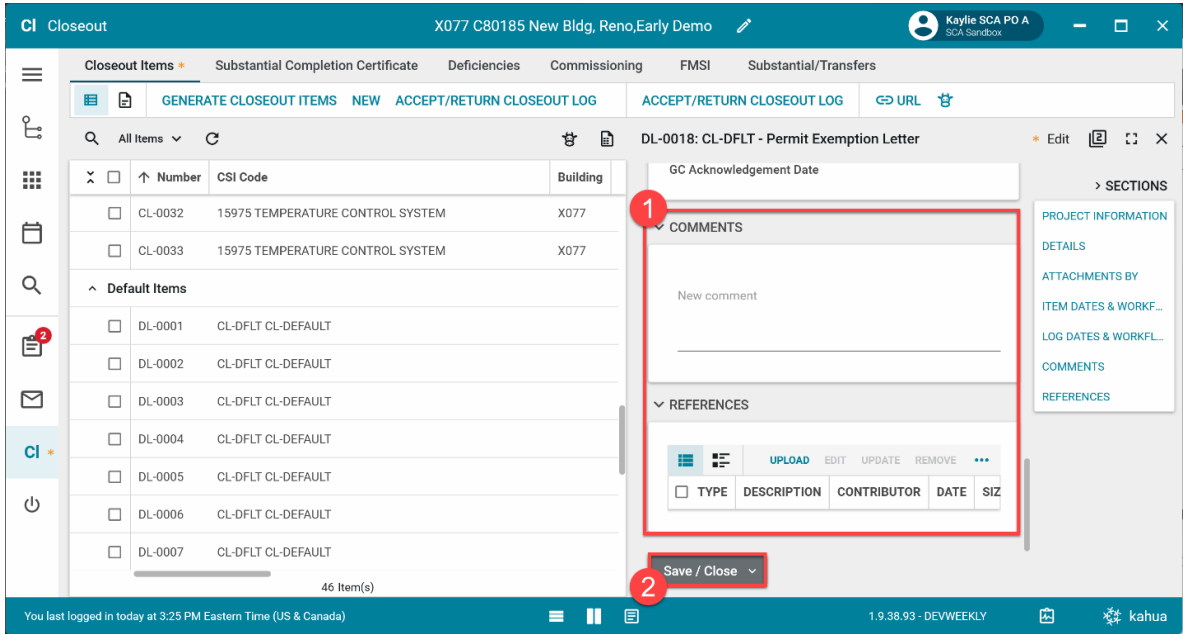
PO Deletes Items

Closeout items are created and the log is in their ball-in-court. Or if the log is approved by PO and AEoR, the Closeout Reviewer (CR) can delete items if required.

Delete Single Item:

1. Select the desired closeout item (do not use the checkboxes)
2. Select **Delete** on the **top-right** of the record
3. Click **Ok** to confirm.
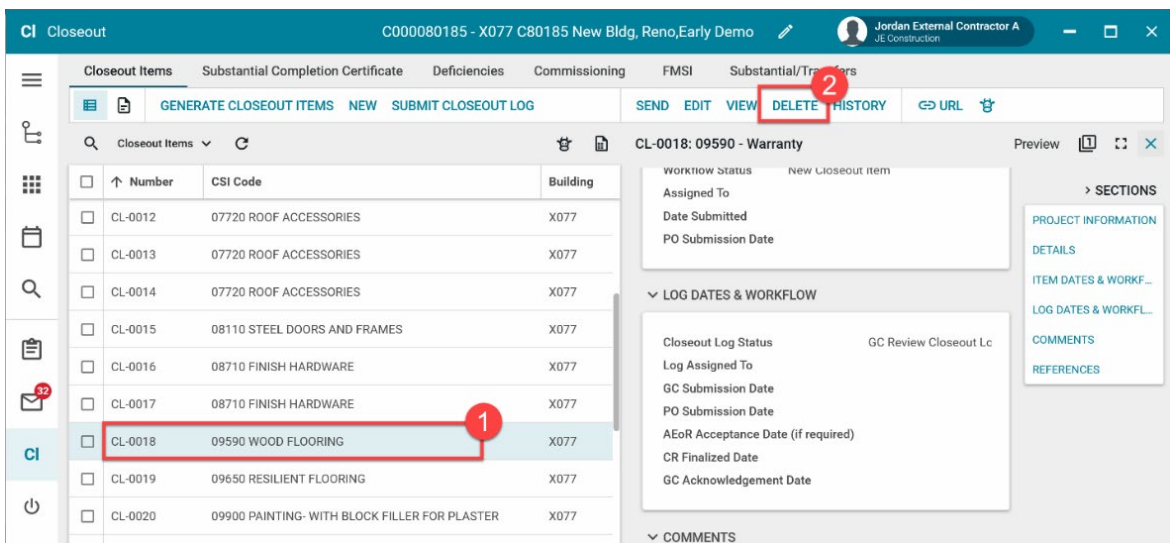
Delete Multiple Items:
1. In the Closeout Items tab> Closeout Items view, **check the box** next to all desired closeout items
2. Click **Delete** above the list
3. Click **Ok** to confirm.
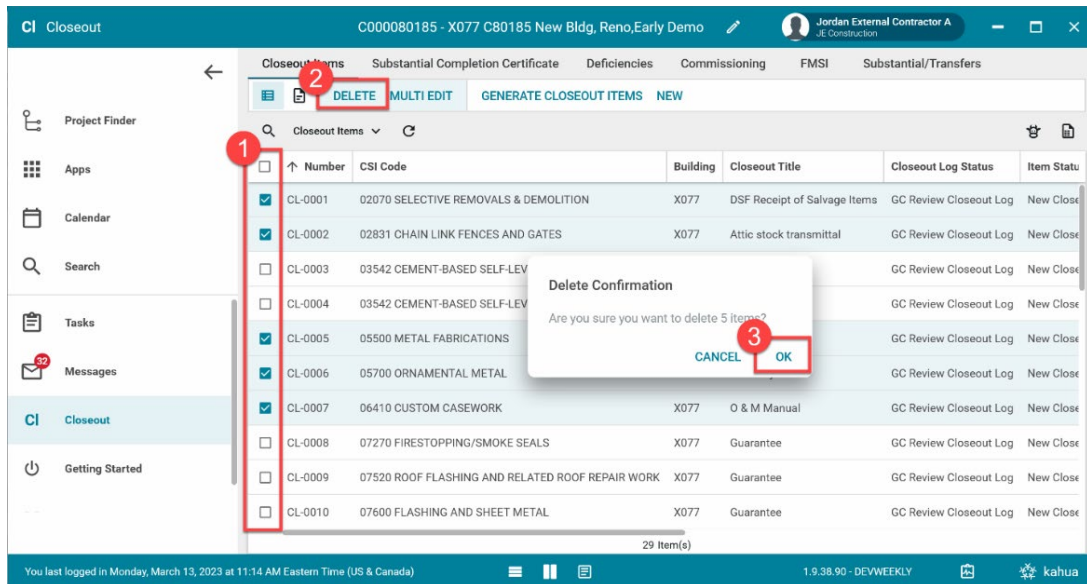
Note: Default items and items requiring AEoR review cannot be deleted. The deletion progress will show up on the bottom-right corner of the screen.

PO Sets Item as Applicable/ Not Applicable

1. Select desired closeout item
2. Click **Set Applicable** or **Not Applicable**
3. Enter **Reason**
4. Click **Continue**
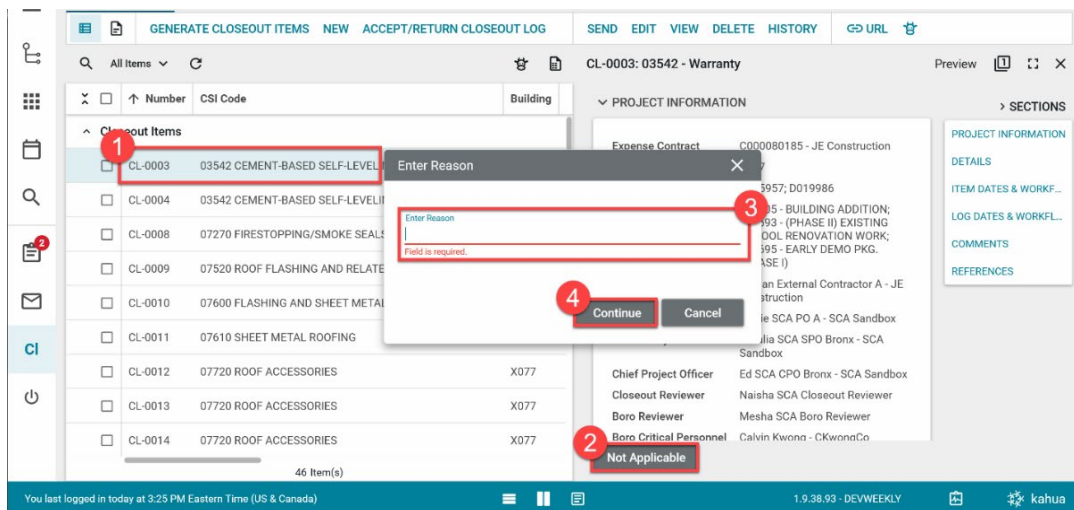
PO Accepts Closeout Log

If there is an item requiring AEoR approval, the log is sent to the AEoR. Otherwise, log is sent to the CR to be finalized.

1. Go to **Messages** > Open message with subject PO Submitted Closeout Log > Select **Open in Kahua** **OR** go to **Tasks,** which will take you directly to the closeout log.
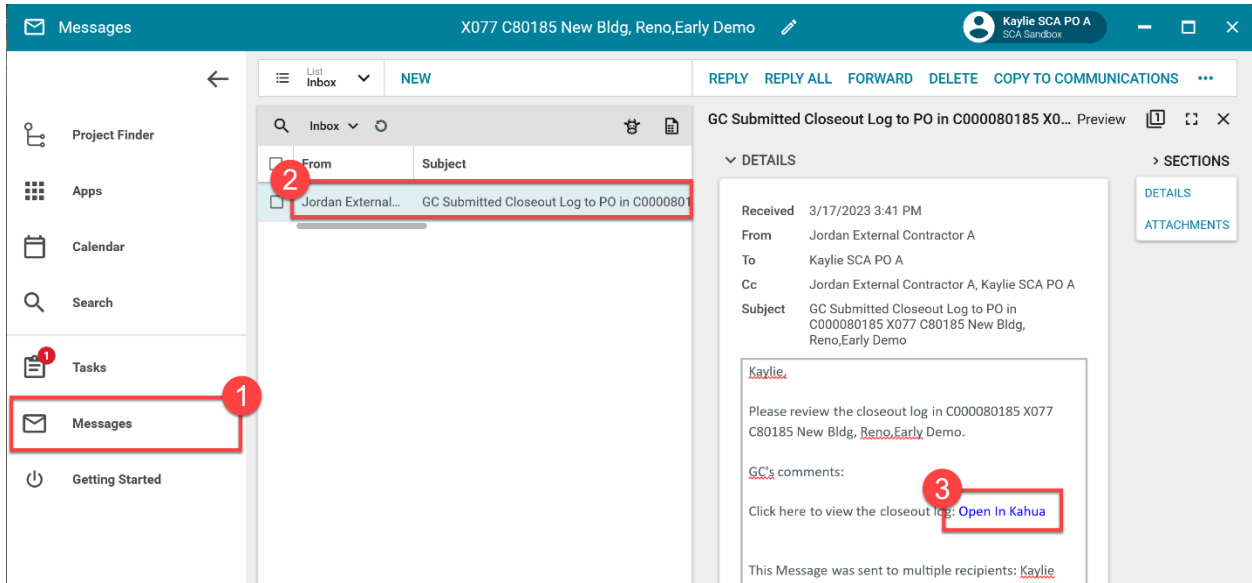
1. Select any closeout item (do not use checkboxes)
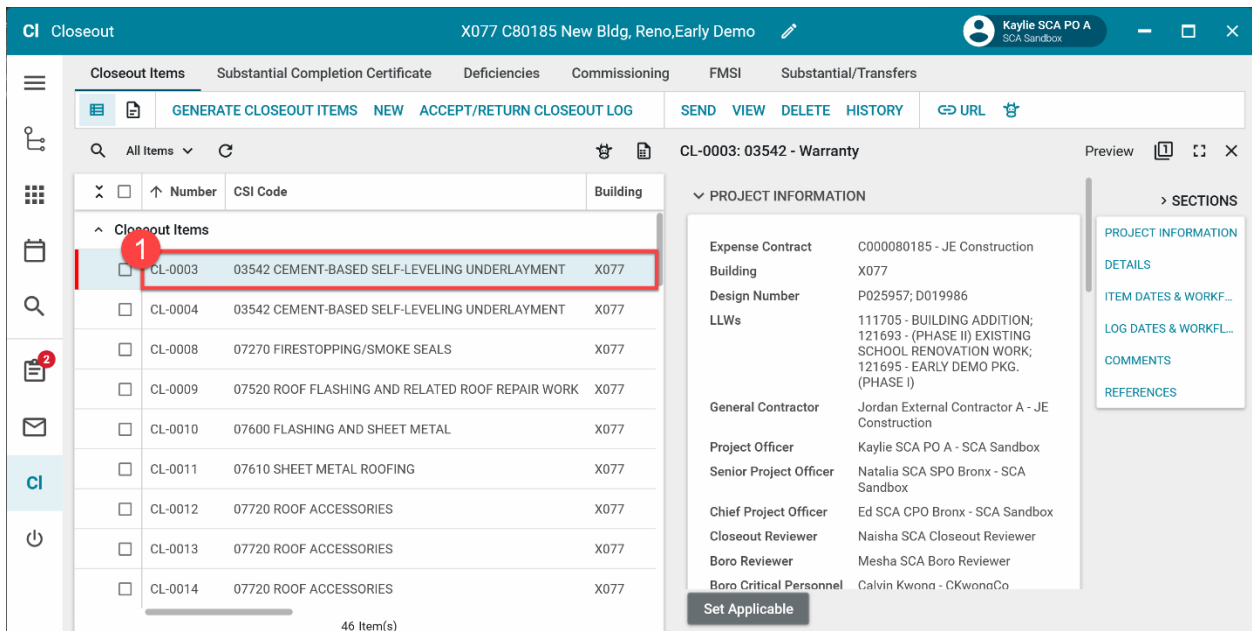
2. Click **ACCEPT/RETURN CLOSEOUT LOG**

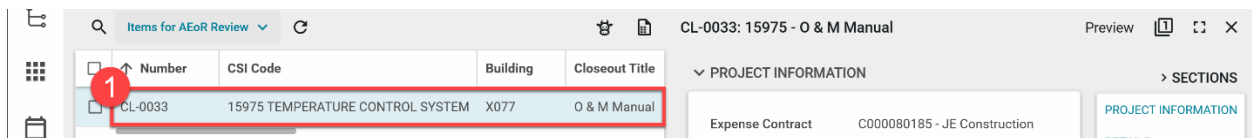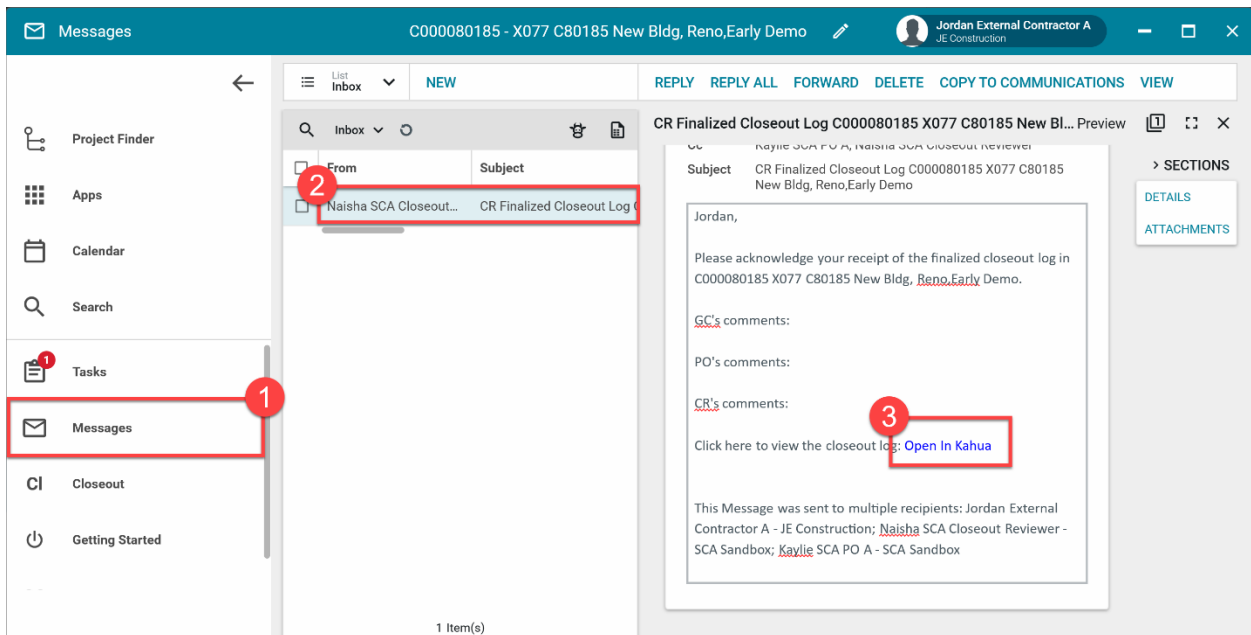**Option 1:** Add comments (Optional)> Click **Accept Closeout Log**
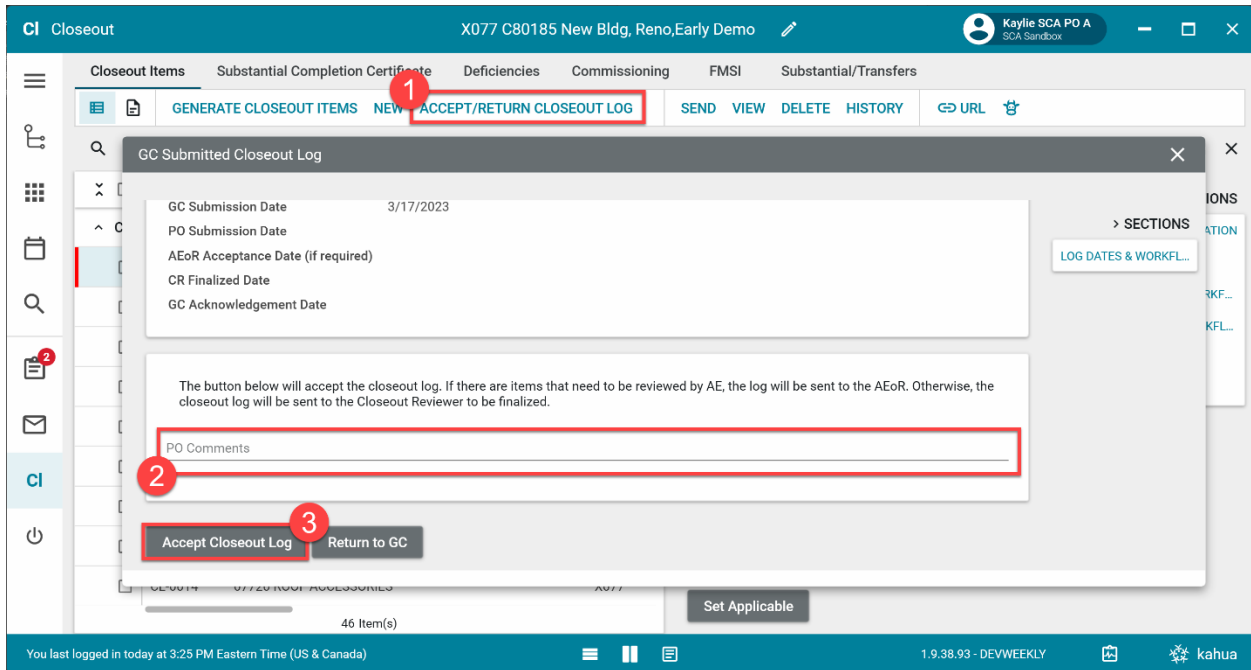
Option 2: Add Comments (**Required**)> Click **Return to GC**
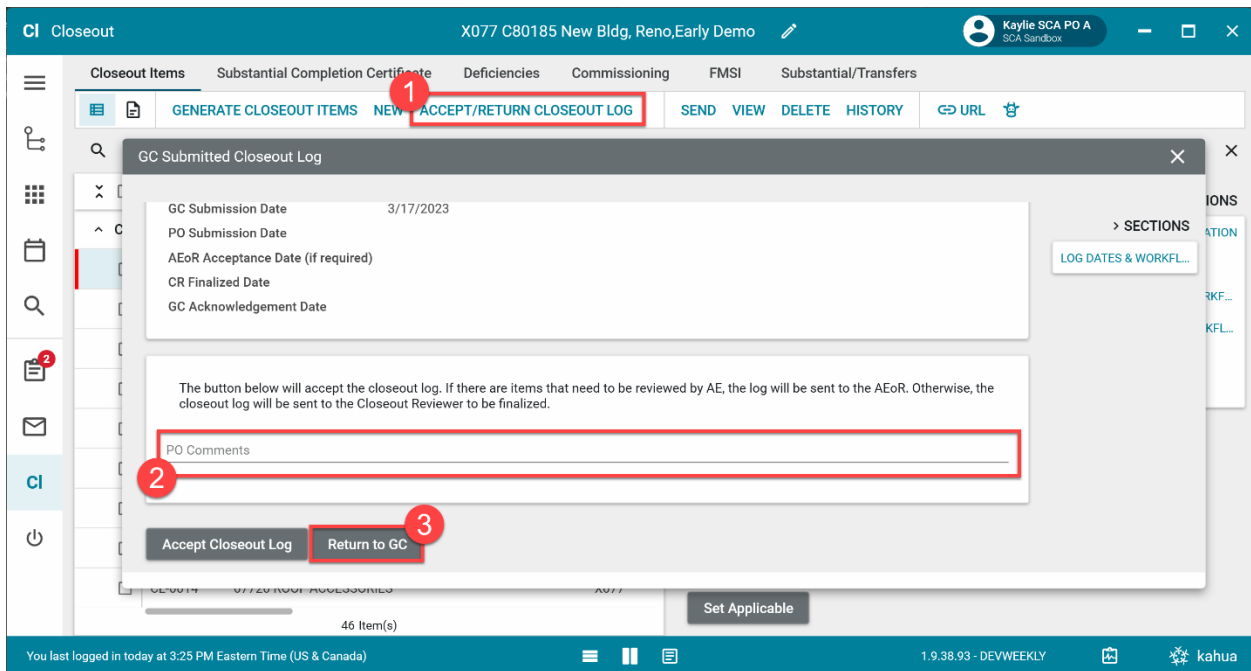
AEoR Accepts Closeout Log
Closeout log has been accepted by the PO and contains items requiring AEoR review.

2. Go to **Messages** > Open message with subject PO Submitted Closeout Log > Select **Open in Kahua or** go to **Tasks,** which will take you directly to the closeout log.
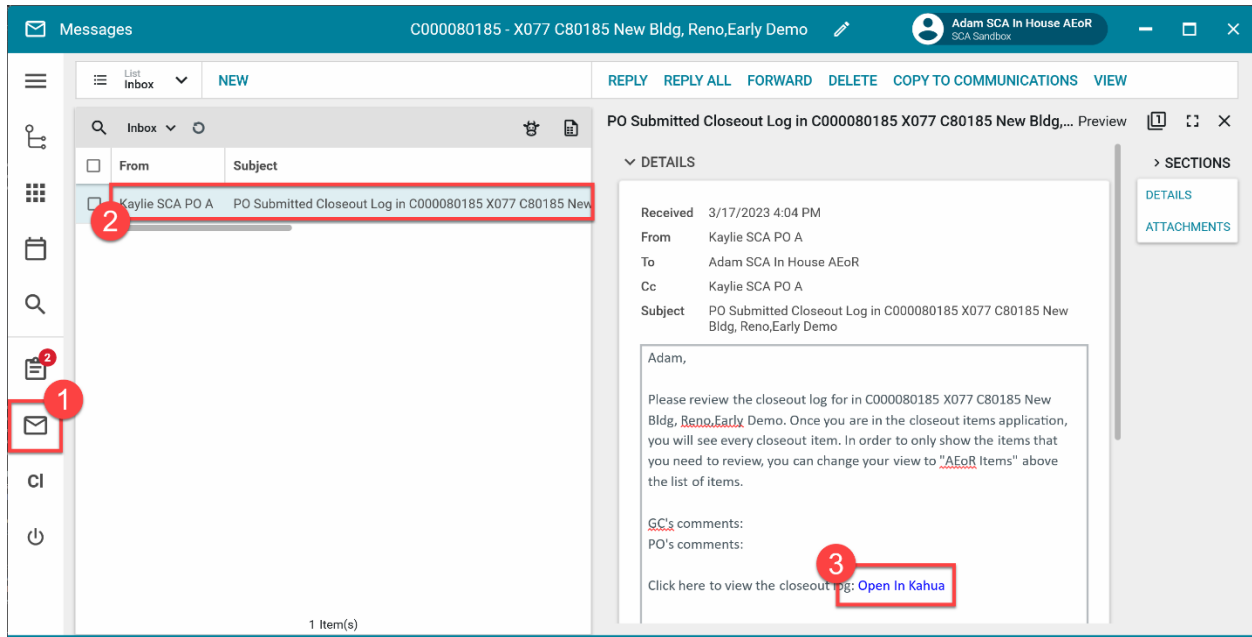
3. Click the **View** menu
4. Select **Items for AEoR Review**
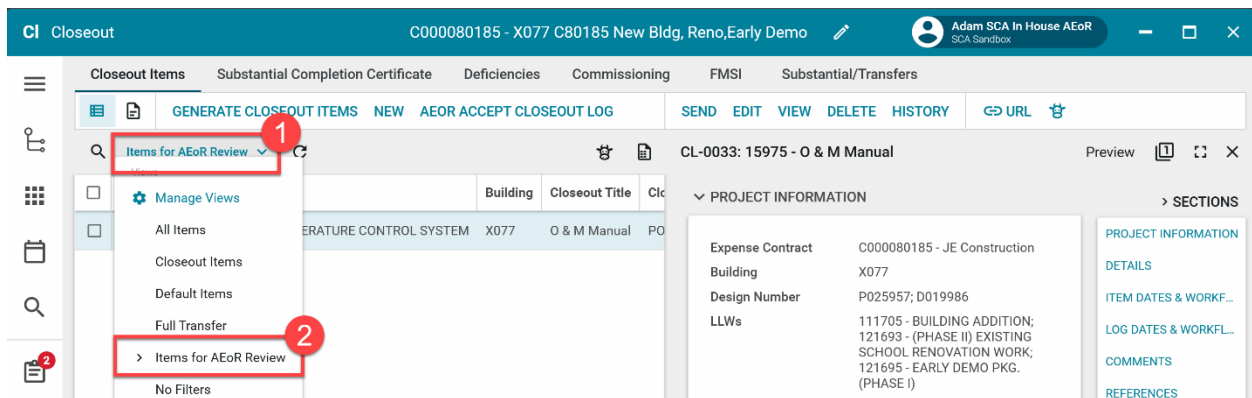
5. Select any closeout item (do not use checkboxes)

6. Click **AEOR ACCEPT CLOSEOUT LOG**
7. Enter comments (optional)
8. Click **Accept and Send to Closeout Reviewer**
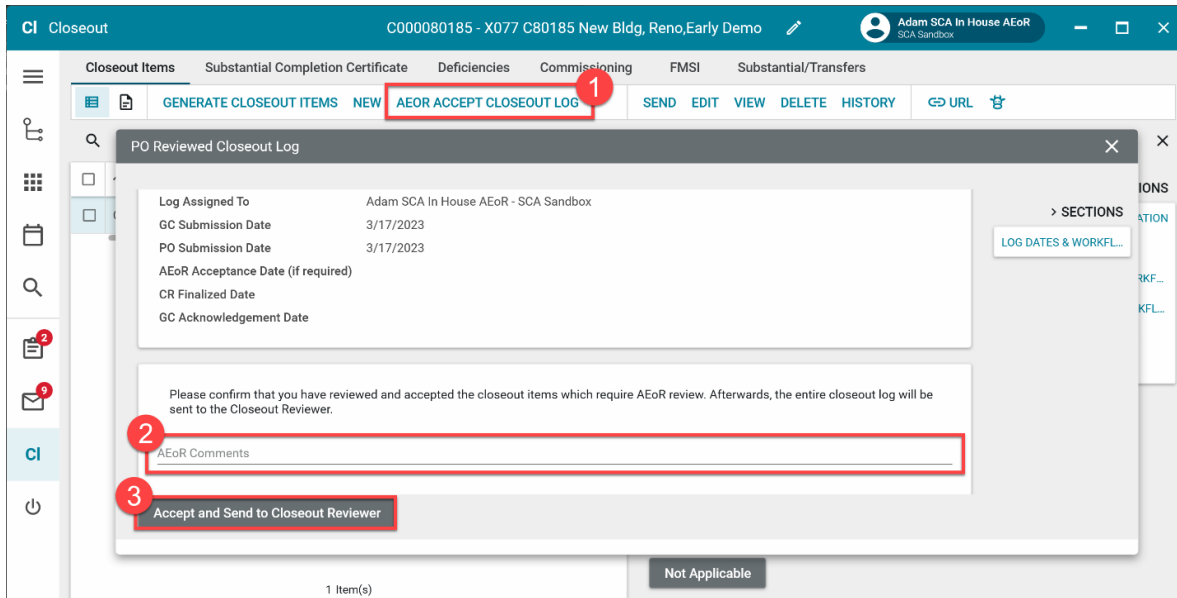
Closeout Reviewer (CR) Finalizes Closeout Log

1. Go to **Messages** > Open message with subject PO Submitted Closeout Log > Select **Open in Kahua** **OR** go to **Tasks,** which will take you directly to the closeout log.
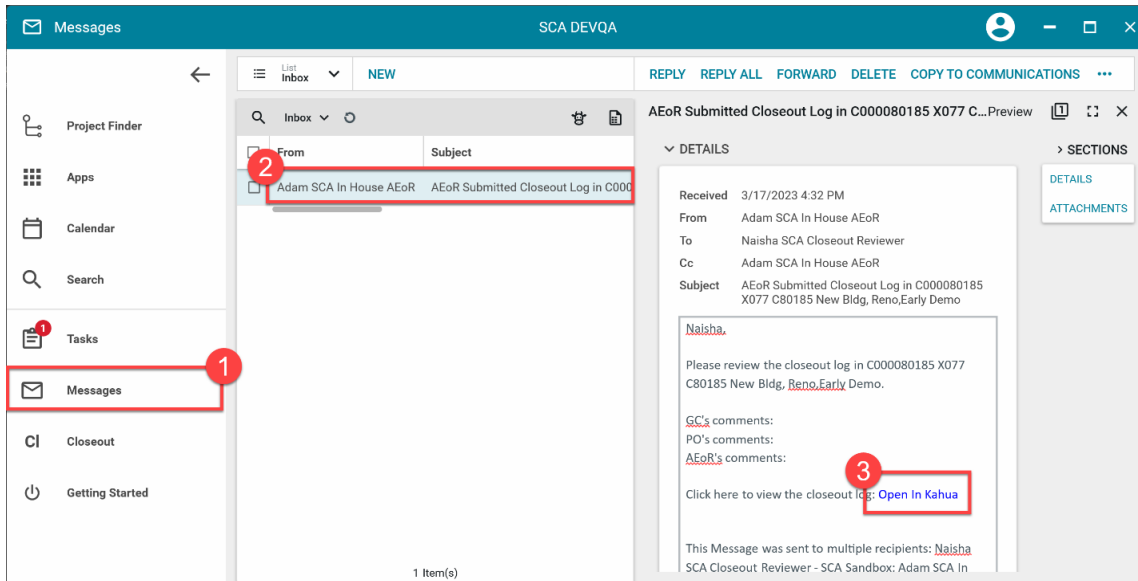
1. Select any closeout item (do not use checkboxes)
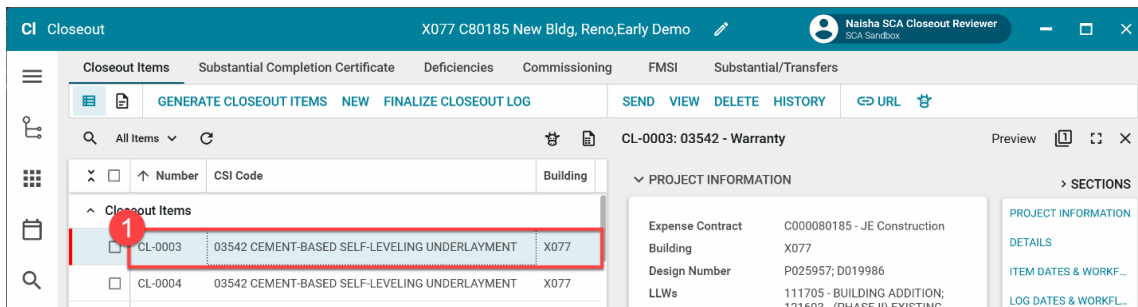
2. Click **FINALIZE CLOSEOUT LOG**
3. Enter comments (optional)
4. Click Finalize Closeout Log
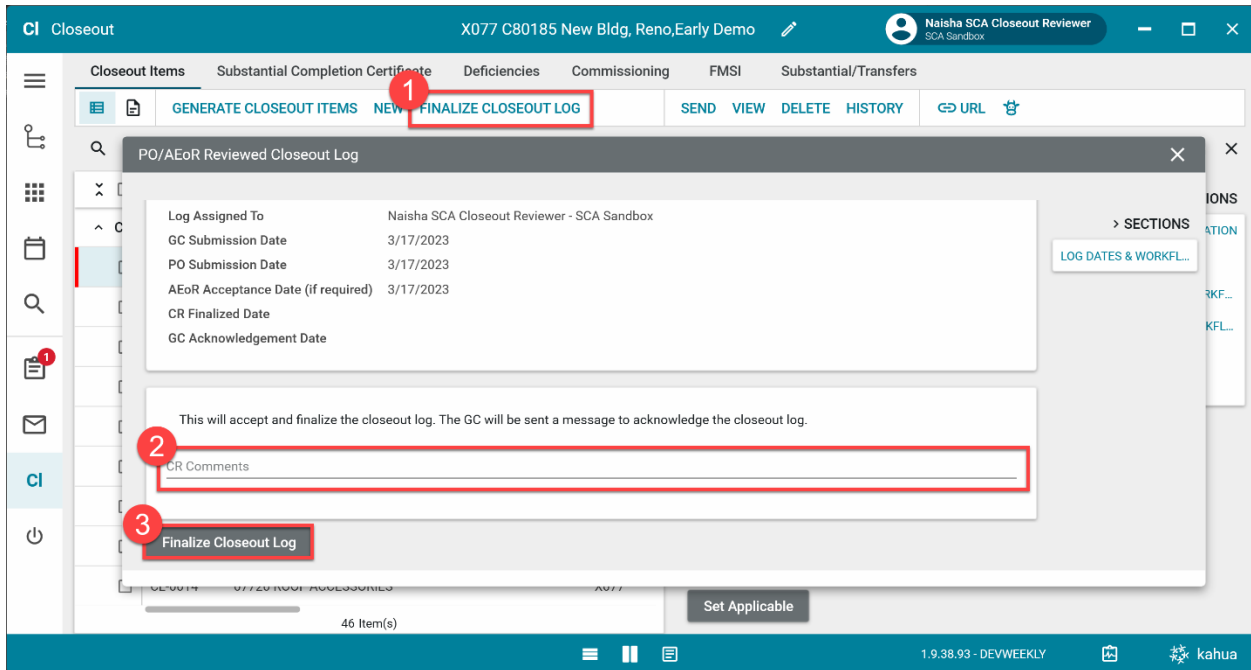
GC Acknowledges Closeout Log

1. Go to **Messages** > Open message with subject **PO Submitted Closeout Log** > Select **Open in Kahua or** go to **Tasks,** which will take you directly to the closeout log.

1. Select any closeout item (do not use checkboxes)

2. Click **ACKNOWLEDGE CLOSEOUT LOG**
3. Enter comments (optional)
4. Click **Acknowledge Receipt of Closeout Log**

GC Attaches Documents to Closeout/Default Items

1. Select the desired item > Click **EDIT**

2. In the **References** section, click **Upload** and select your document to attach (PDF, JPG, PNG)
3. **Click Save / Close**

GC Submits Closeout Items

Option 1: GC Submits Single Closeout Item with Attachments
Closeout item has attachments in the References section. Closeout item is sent to the PO for submission. A message will be sent to the PO for each item that is submitted.

1. Select the desired item > Click **Submit**

   Note: If the item was previously returned, the button will be called Resubmit and requires a comment.
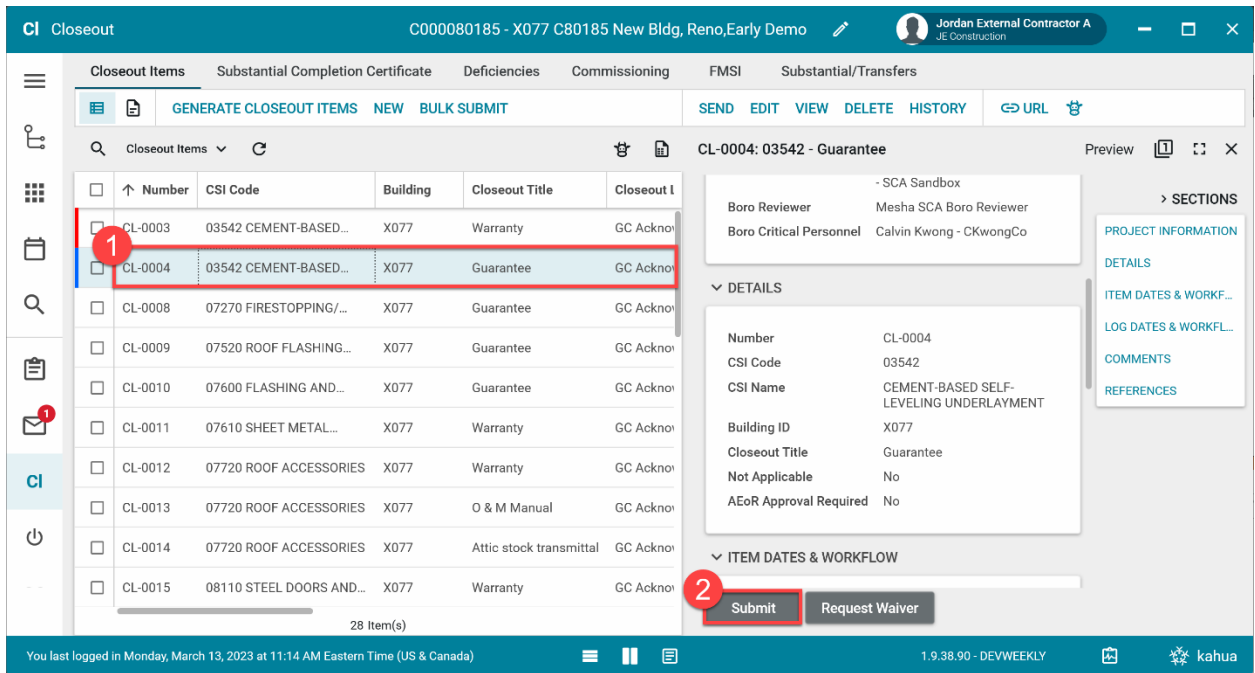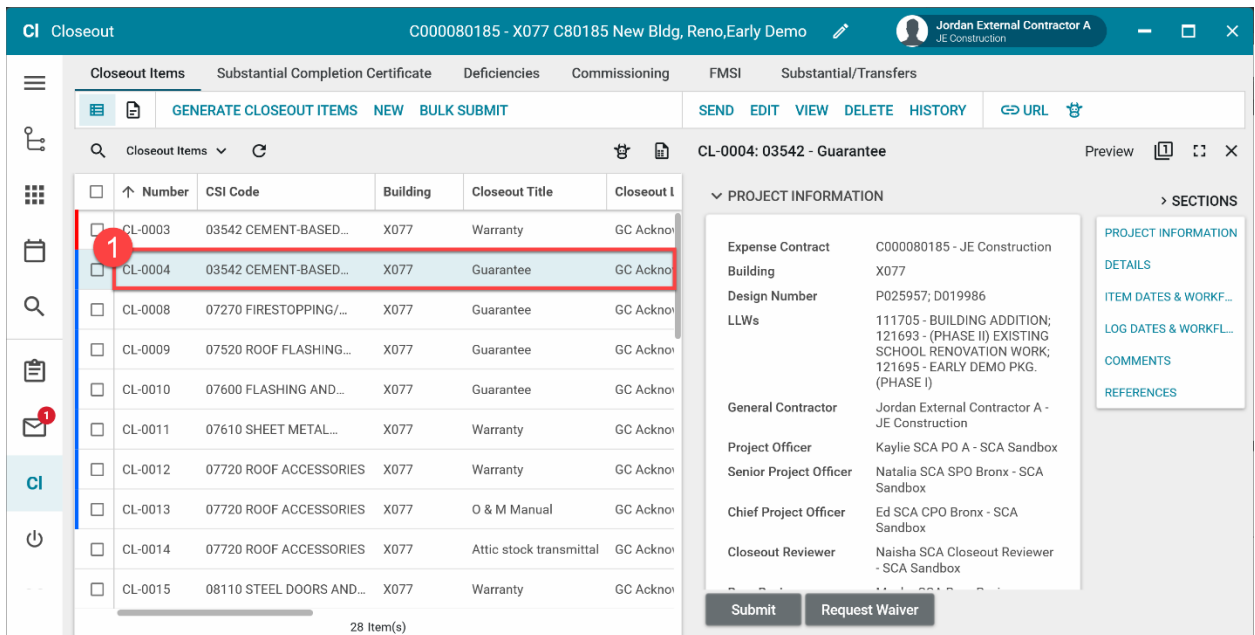
Option 2: GC Submits Multiple Closeout Items

Closeout items have attachments in the References section. Returned items also require a comment to be added. Closeout items are sent to the PO for submission. A single message will be sent to the PO.

1. Select any closeout item (do not use the checkboxes)

2. Select **BULK SUBMIT**
3. Use the **checkboxes** to select which items to submit (every eligible item is selected by default)
4. Click **Submit Selected Items**
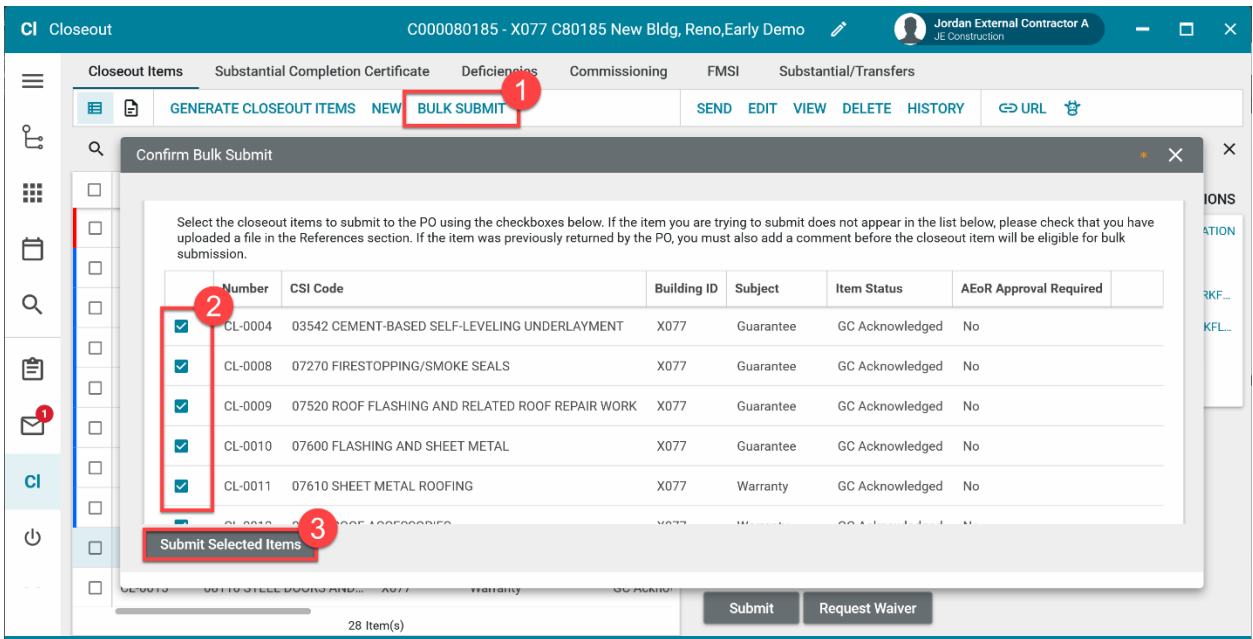
Option 3: GC Requests a Waiver

1. You might have a Bulletin that was issued etc. **Upload** all supporting documents.
2. Click **Request Waiver**
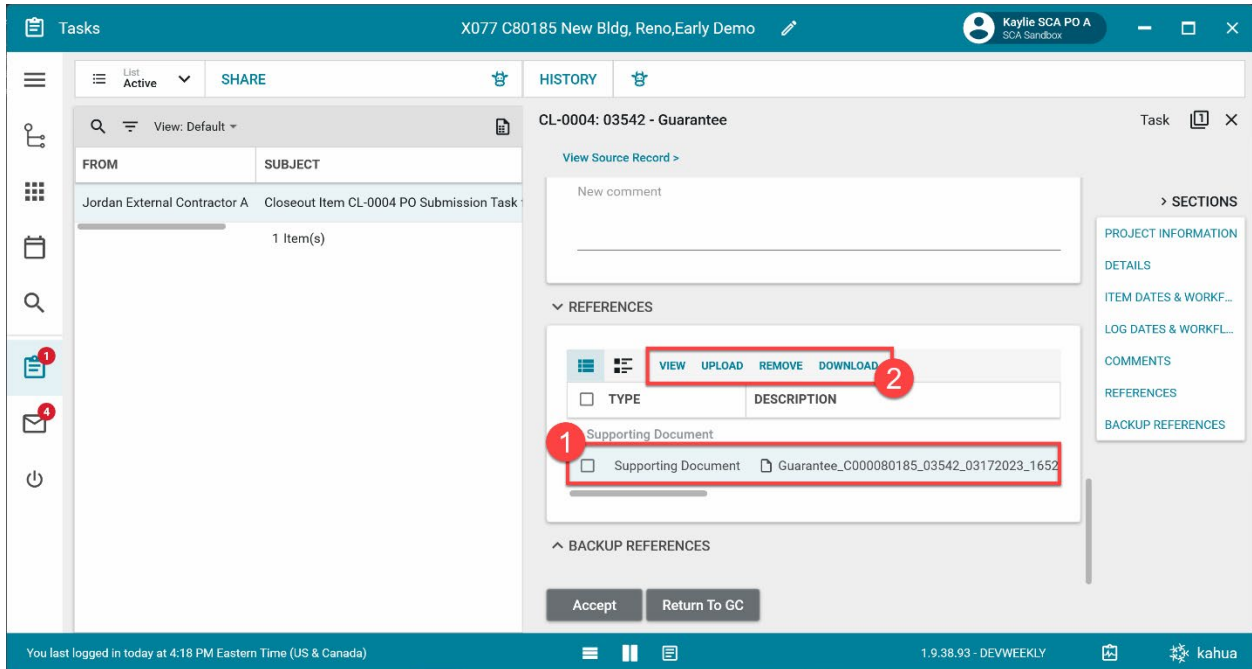

PO Accepts or Returns the Closeout Item

If item requires AEoR, then the item is sent to the AEoR for submission. Otherwise, item is ready for transfer.

1. Go to Tasks > Select the task with subject of PO Submission Task
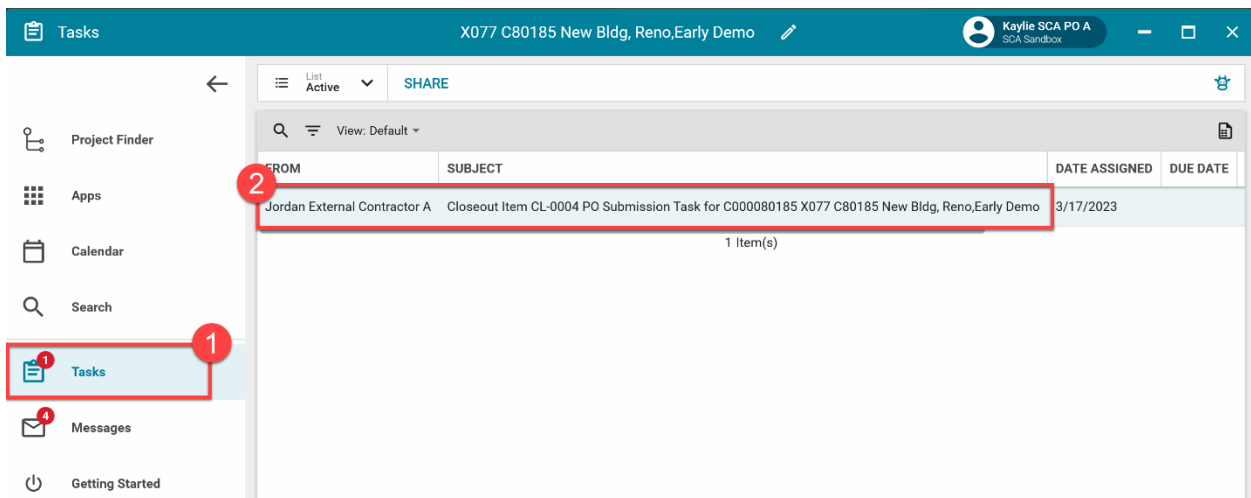

2. In the **References** section, select attached file
3. Click **View** or **Download** to see the file

Note: To replace the file, you can click **Remove**, then click Upload to add a new file. All previous files can be viewed by expanding the Backup References section. The file will be renamed when accepting or returning the file to the GC, and a comment will be required.
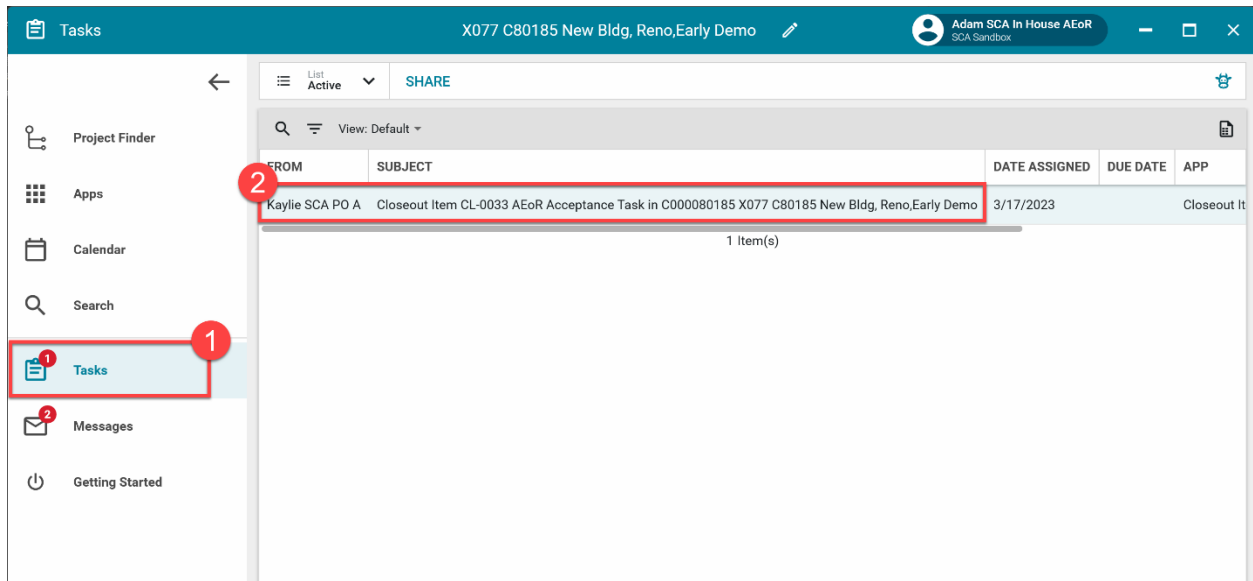

Option 1: Click **Accept**
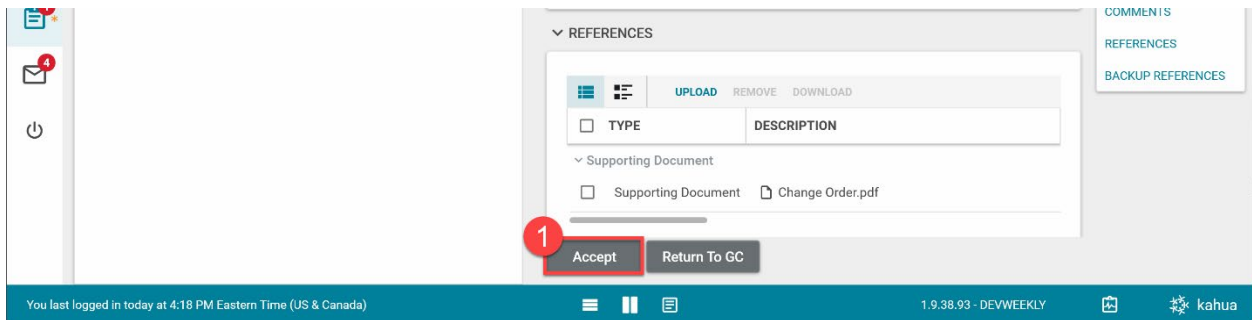
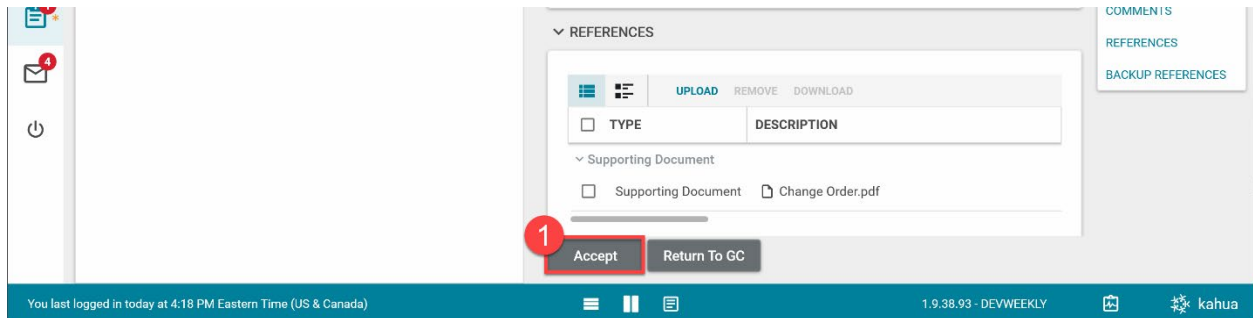Option 2: Enter **Comments (Required)>** Click **Return to GC**
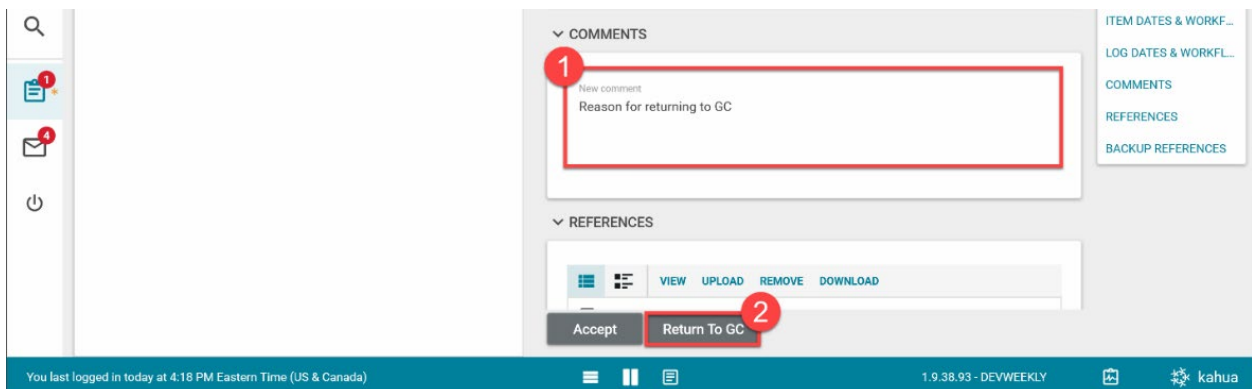
AEoR Accepts or Returns the Closeout Item

Closeout item has been accepted by the PO and requires AEoR approval. Item is marked as ready for transfer.

1. Go to Tasks > Select the task with subject of AEoR Acceptance Task

Option 1: Click **Accept**

Option 2: Enter **Comments (Required)>** Click **Return to GC**