

Deficiencies Training Guide

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About

The Deficiencies application contains records of deficiency items that are missing and must be resolved by the GC prior to sign off for the Substantial Completion Certificate. Each project will have a single Deficiency List that must be reviewed before the individual items can be completed. After the Deficiency List has been approved by the architect, the workflow for the Substantial Completion application can continue.

Notes

While the Deficiency process is consistent for all project types, the terms CM Firm and CM Project Manager are specific to Requirements projects. The CM Firm acts on behalf of the General Contractor and the CM Project Manager is in the role of the Project Officer.

The List Status column shows the status of the entire deficiency list (Pre-List Submission, PO Deficiency Review, SPO Deficiency Review, Pending GC Acknowledgement, List Acknowledged, and List Approved).

The Item Status column shows the status of the individual deficiency item (Locked, Active, Pending GC Completion, PO Review, Complete).

Process Overview

During the workflow for the Substantial Completion application, the AEoR may specify that Deficiencies are required. In this case, AE and team will create a list of deficiencies including items from all trades and disciplines. After all deficiency items have been gathered, the AEoR will send the Deficiency List to the PO (CM Project Manager) for review.

The PO or CM Project Manager will receive a message with a link to review the Deficiency List. After their review, they will send the list to the SPO for review. The SPO will receive a similar message with a link to review the deficiencies. The SPO will review and send the list to the GC (CM Firm on behalf of GC).

The GC will receive the Deficiency List and must acknowledge their receipt of the list. After acknowledgement, the GC will receive tasks to complete each deficiency item on the received list. The GC will resolve each deficiency item and send the item to the PO. Each individual item should have a response. If completed, a photo or details on the resolution should be provided. If the item is not within their scope of work, the contractor should specify that in their comments.

After the item has been sent to the PO, the project officer will receive a task to agree with the item completion or return to the GC. After the PO agrees that all items have been completed, the AEoR will receive a message notifying them that the entire list has been resolved.

Each item can be returned by the AEoR which will send a task to the PO to resolve. If the AEoR agrees that an item is complete, no action needs to be taken. Finally, after AE agrees with the completion of all the deficiency items, the entire list can be approved. Once the list has been approved, the workflow to generate the substantial completion certificate can proceed.

Up until the list has been approved, the AEoR can still create new deficiency items that will be routed to the appropriate workflow .

Workflow Diagram



Step-by-Step Instructions AE Creates Deficiency Item

1. Go to Project Finder > Select the desired project

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E Project Finder	SCA DEVQA > Requirements > Mentor > TDX > T	TDX - K&R - DELTA MNTR C15635-C15848	SELECT			
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Tasks	→ C000015848-LS0002 К678 Рте-К	\$ /				
Messages	→ C000015848-LS0006 K730 New Building	÷ /				
() Getting Started	→ C000015848-LS0005 R030 Masonry 2	÷ /				
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2. Go to Apps > All Apps> Select the Closeout App

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- 3. Select the **Deficiencies** tab
- 4. Click NEW DEFICIENCY ITEM.
- 5. Hardbid Projects have one Contract and one LLW, which will be automatically populated. Emergency might have more than one; select from the drop-down menus.

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6. Enter **Description (required)**. The **Date** is populated – update if necessary.

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7. Comments (Optional)

8. Click UPLOAD in the References section to add an attachment.



9. Click Save and Lock to save a Draft. You have not submitted the transfer at this point.

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10. Click OK

Please Confirm New Item

This will create a new deficiency item with the 'Locked' status. If you wish to edit or delete the item, you must click on the desired item and click the 'Unlock Deficiency Item' button.



Edit Deficiency Item

You might need to make changes to the Deficiency Item before submitting.

a) Select the desired request to update > Click Unlock Deficiency Item



b) Click OK to unlock

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c) Click EDIT

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d) Update fields as required and click **Save and Lock**, then click OK to confirm.

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e) Click **OK**

Please Confirm Lock Action
This will lock selected deficiency item and prevent editing.
CANCEL

10. Click SEND DEFICIENCY LIST TO PO

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11. Click Send Deficiency List to PO in the popup window

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12. Click **OK** to confirm that all items have been gathered

AEoR Submission Date PO Acceptance PO Acceptance Date SPO Acceptance Date AEoR Acceptance Date AEoR Acceptance Date Deficiency List State Pre-List	Confirm Gathered Deficiencies Please confirm that you have gathered the deficiency items from all trades/disciplines.

PO/CM PM Reviews Deficiency List

PO Receives a message to review the deficiencies list. Once reviewed:

1. Select any deficiency item (do not use checkbox) and click SEND DEFICIENCY LIST TO SPO



2. Click Send Deficiency List to SPO

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SPO Reviews Deficiency List

SPO Receives a message to review the deficiencies list. Once reviewed:

1. Select any deficiency item (do not use checkbox) and click SEND DEFICIENCY LIST TO GC



2. Click Send Deficiency List to GC

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GC Acknowledges Deficiency List

GC Receives a message to review the deficiencies list. Once reviewed:

1. Select any deficiency item (do not use checkbox) and click ACKNOWLEDGE DEFICIENCY LIST

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2. Click Acknowledge Receipt of Deficiency List

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P		
CI	by clicking the button below, you are acknowledging that you have received the list of dericiency items. After acknowledgement, you will be assigned tasks for every deficiency item in the list. After the deficiency has been resolved, you must mark each item as complete in your tasks.	Γ
ባ	Acknowledge Receipt of Deficiency List	
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GC Completes Deficiency Items

Once the Deficiency List has been acknowledged, tasks are generated for each item on the list for the GC to complete.

1. Go to **Tasks** > Select the desired deficiency task

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- 2. Scroll to the **Comments** section (required) and add remarks, such as if the item is not within the scope of work.
- 3. Click UPLOAD in the References section to add any necessary attachments
- 4. Click **Complete Item** and click **OK**

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PO Accepts or Returns Deficiencies Items

1. Go to Tasks > Select the desired deficiency task

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Option 1: PO agrees with the completion of the Deficiency List

- 1. **Comments** section: A comment is only required if the deficiency was previously returned by the AEoR.
- 2. Click UPLOAD in the References section to add any necessary attachments
- 3. Click Agree with Item Completion and click OK

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Option 2: PO Returns Completed Item to GC. The GC will receive a task to complete the item.

- 1. **Comments** section (Required): Enter reason for return
- 2. Select UPLOAD in the References section to add any necessary attachments
- 3. Click Return to GC
- 4. Click OK

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AEoR Accepts or Returns Deficiency List

All deficiency items are marked Complete. The AEoR approves the deficiency list, and the substantial completion workflow can continue.

Option 1: AEoR Accepts the list

- 1. Select any deficiency item (do not use checkbox)
- 2. Click APPROVE DEFICIENCY LIST



- 3. Click Approve Completed Deficiency List
- 4. Click Accept



Option 2: AEoR Returns Completed Item to PO

The PO has marked the deficiency item as complete, but the AEoR rejects the item.

- 1. Select the completed deficiency item
- 2. Click Return to PO



- 3. Enter the reason for returning the deficiency item
- 4. Click Continue

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