



Punch List Training Guide

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About

The Punch List app tracks construction punch list items that must be addressed before construction is complete and payment is issued. These items will be addressed and completed by the GC or withdrawn from the list. After every punch list in the project is completed, a full or special transfer can be created.

Process Overview

The AEO can add a Punch List item, selecting a Design Number/LLW and Building. A punch list is created for each Design Number/LLW and Building combination that is selected by the AEO.

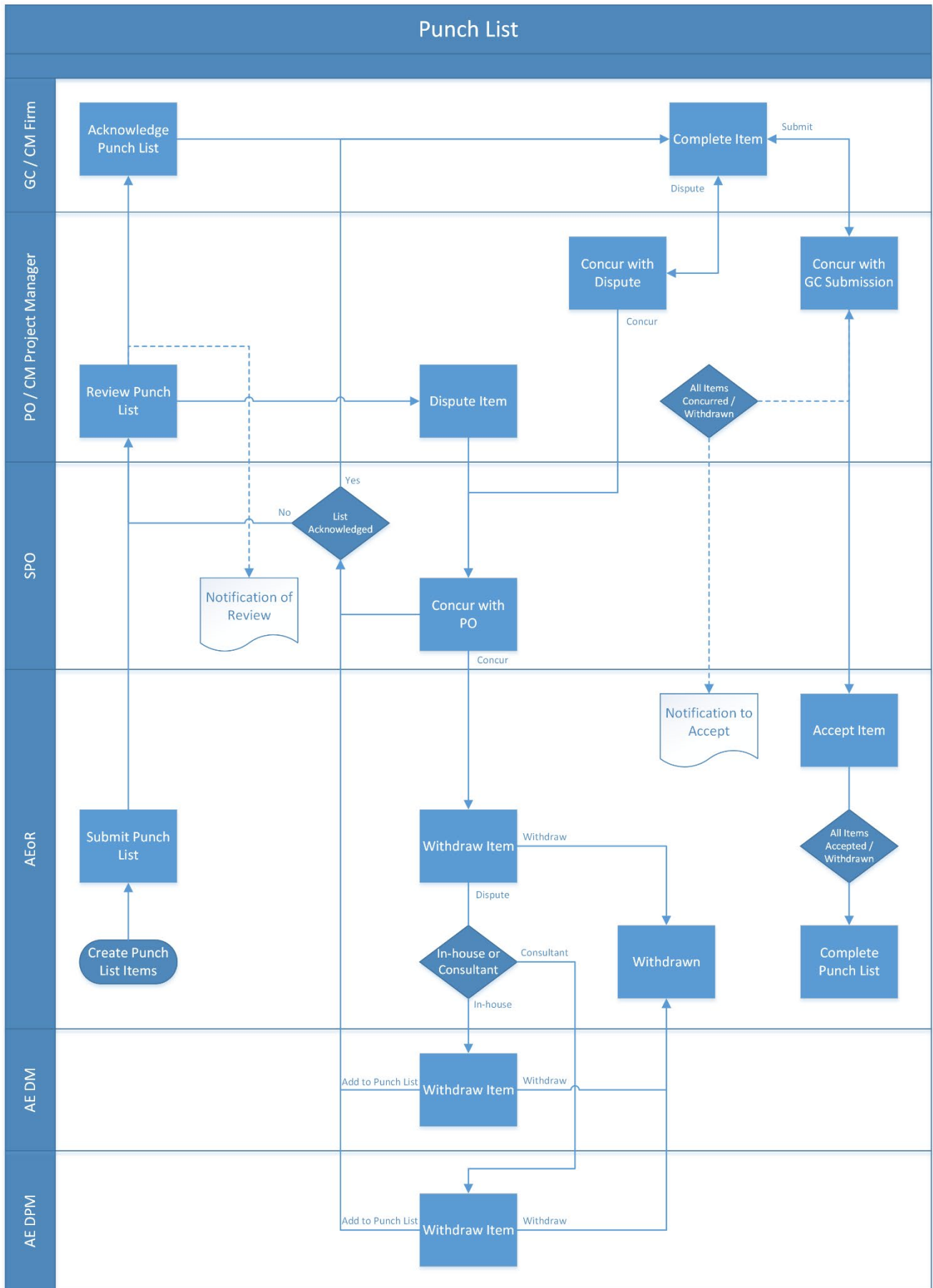
The AEO submits each list separately to the PO to review. During the review of a punch list, the PO can return items to the AEO for withdrawal. After the PO reviews a punch list, it is sent to the GC for acknowledgement. Once the items in the list are acknowledged, the GC will receive a task to complete or dispute individual punch list items. At any point before the punch list is completed, the AEO can add new items to the list, but they must go through this initial review process before the GC can complete or dispute.

When an item is completed, a Comment is required along with optional attachments or images. A completed item is sent to the PO for concurrence. Following the PO's concurrence, the AEO can accept or return the completed item. The AEO will not be sent a notification to accept items unless all items in a punch list have been concurred by the PO or withdrawn.

If the GC does not agree with an item, they can dispute the item. If the PO and SPO both concur with the GC, the AEO will receive a task to withdraw the disputed item from the punch list. The AEO can withdraw the item or dispute with withdrawing the item. In the case of a dispute, the DM (in-house projects) or DPM (consultant projects) will provide the final decision on whether the item should be withdrawn.

After every item in a punch list has been satisfied (all items have been accepted or withdrawn), the AEO will complete the punch list. Items that are inside of a completed punch list will have a green indicator line on the left side of the application.

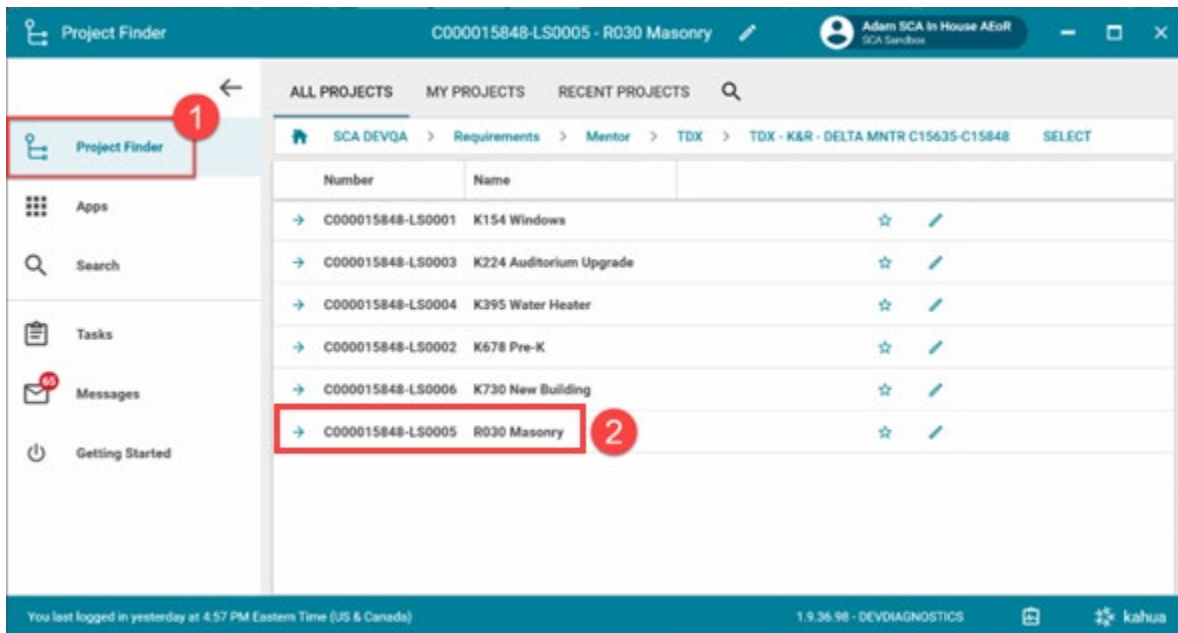
Workflow Diagram



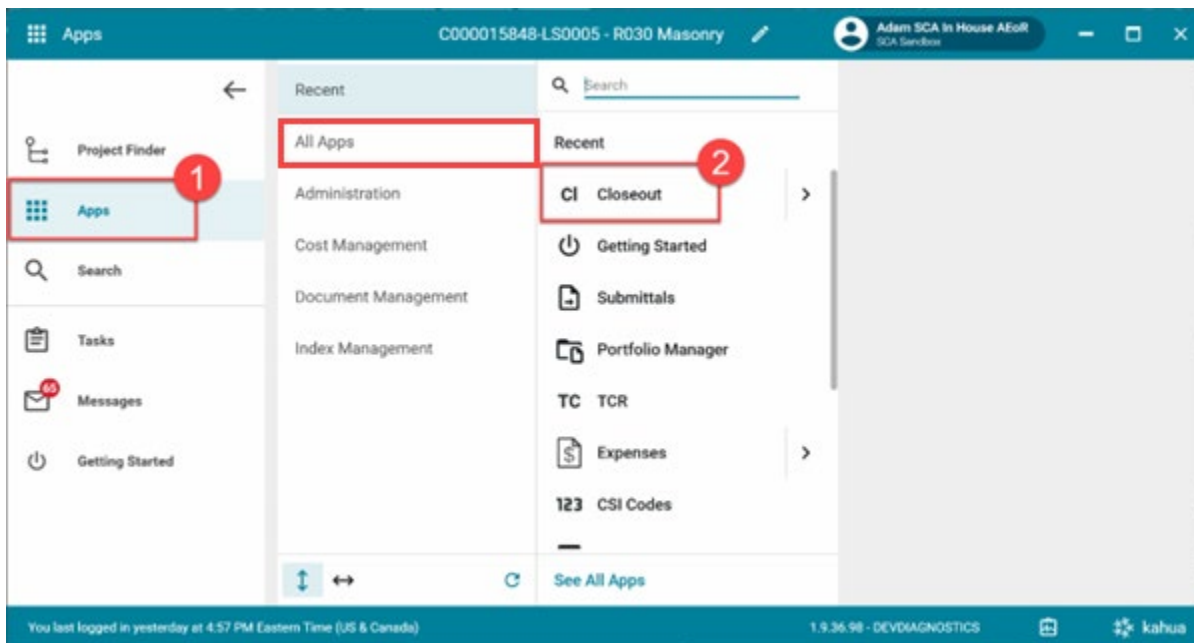
Step-by-Step Instructions

AEoR Creates Punch List Item

1. Go to Project Finder > Select the desired project

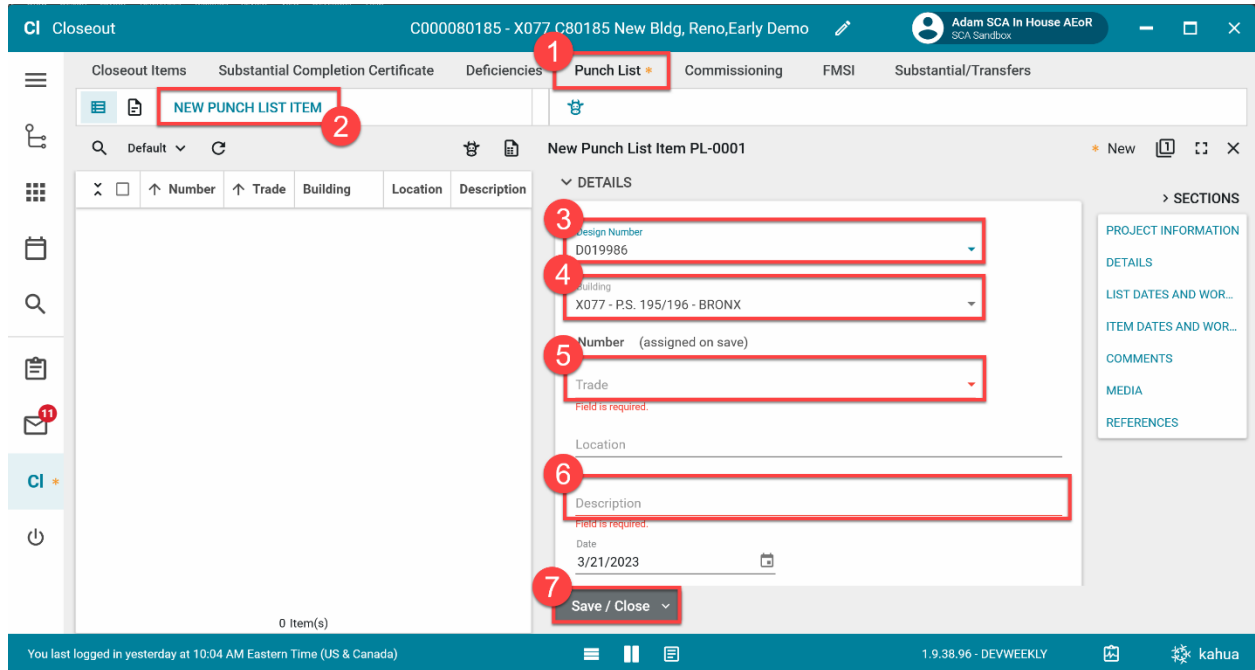


2. Go to Apps > All Apps> Select the Closeout App



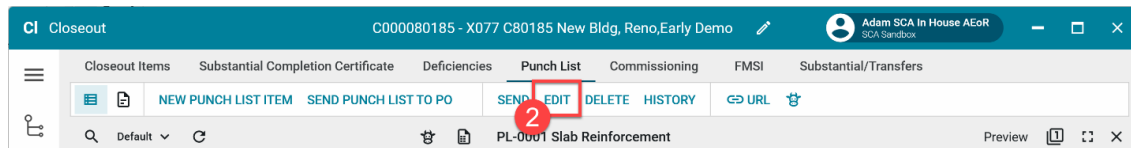
3. Select the **Punch List** tab> Click NEW PUNCH LIST ITEM
4. In the **Details** section, select
 - a. LLW or Design Number
 - b. Building
 - c. Trade
 - d. Enter a Description
5. **Media** section (Optional): Add supporting photos
6. **References** section (Optional): Add supporting documents
7. Click **Save / Close**

Note: The image below is from a CIP project and allows for a Design Number to be selected. In a Capacity project, you will select the LLW instead.



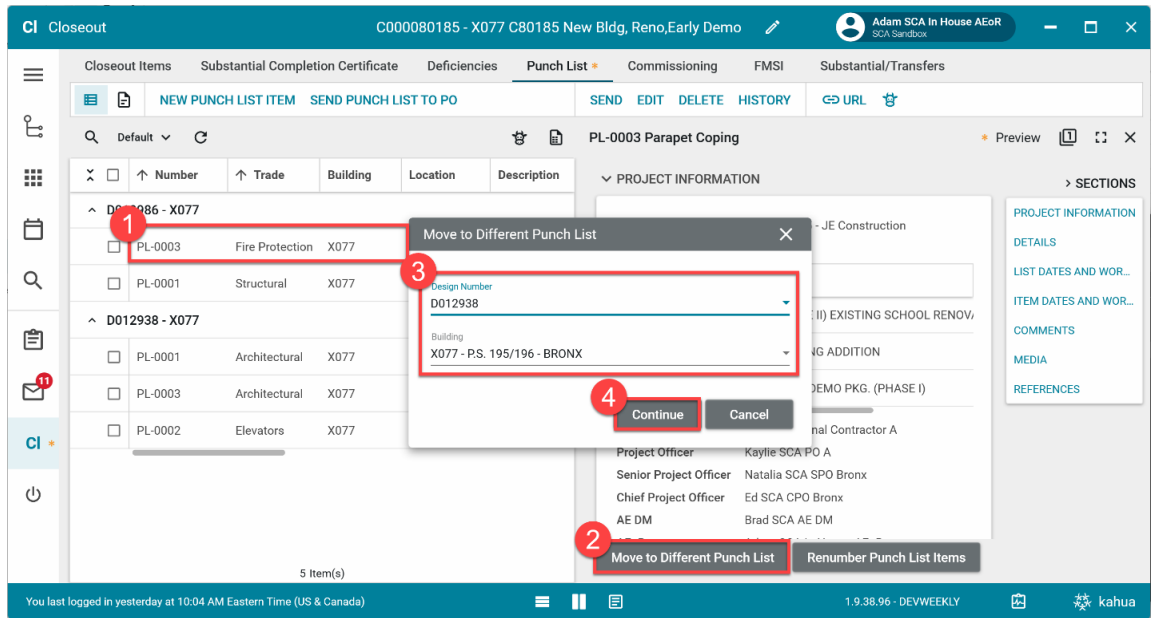
Edit Punch List Item

You can make changes to the Punch List before submitting by clicking **Edit**. Click **Save/Close** when finished.



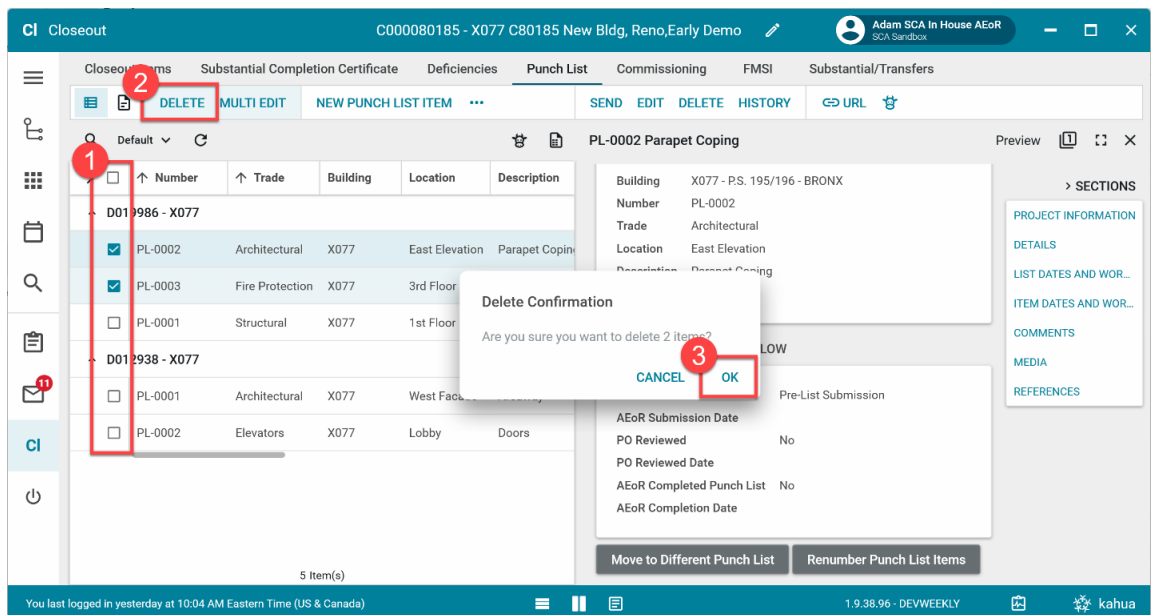
Move Item to Different Punch List

1. Select an item from a Punch List
2. Click **Move to Different Punch List**
3. Select the new LLW / Design Number and Building
4. Click **Continue** to confirm. The Item is moved to a different punch list and renumbered.

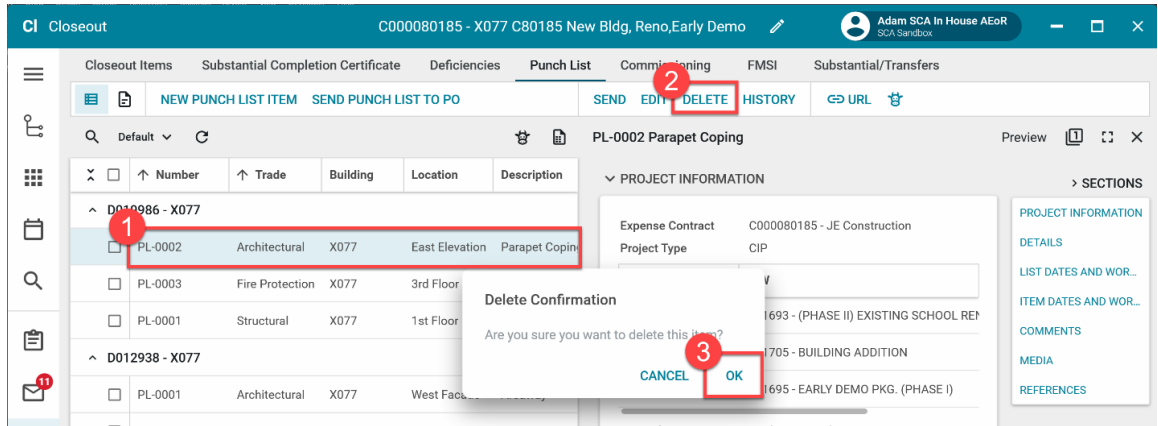


Delete Punch List Items

1. **Delete Multiple Items:** Select items by using **checkboxes** on the left > Click **Delete** > Click **Ok** to confirm.

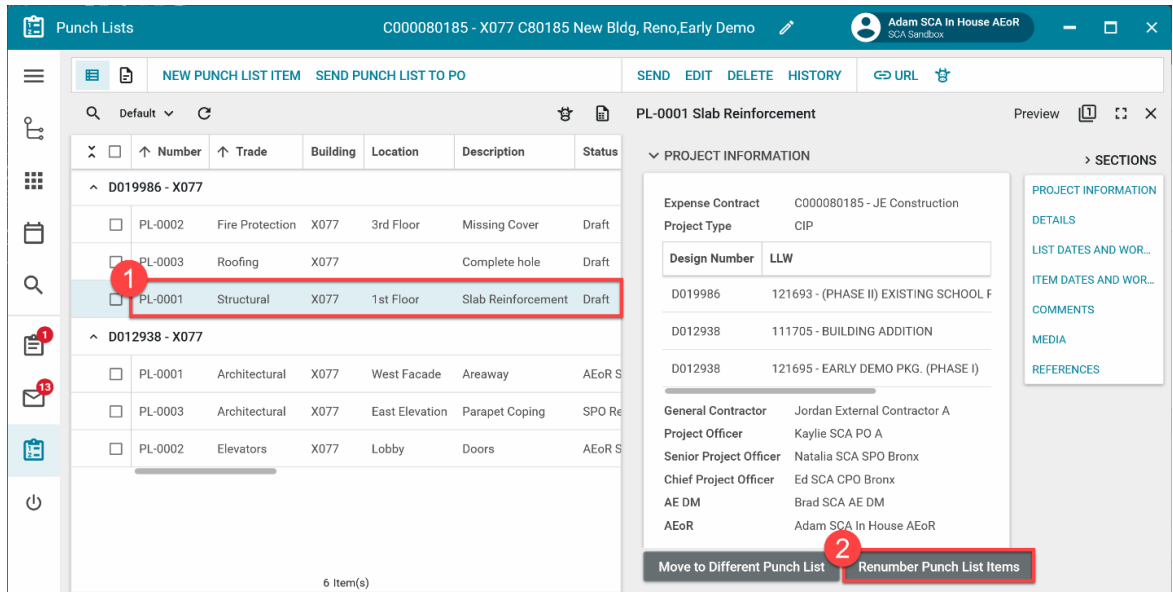


2. **Delete Single Item:** Select the item (do not use the checkboxes) > Click **Delete** > Click **Ok** to confirm.



Renumber Punch List Items

1. Select any item under the desired punch list > Click **Renumber Punch List Items**. System rennumbers items in the selected punch list so that the numbers do not skip.



AEoR Submits Punch List

1. Select item with the Draft or AEoR Recalled status under the desired punch list
2. Click **SEND PUNCH LIST TO PO**

The image below will submit Draft or AEoR Recalled items within the D012938 – X077 punch list.

The screenshot shows the 'Closeout' system interface for project 'C000080185 - X077 C80185 New Bldg, Reno,Early Demo'. The 'Punch List' tab is active, displaying a table of items. The item 'PL-0001 Architectural X077 West Facade Areaway' is selected and highlighted with a red box, with a red circle '1' next to it. The 'SEND PUNCH LIST TO PO' button is also highlighted with a red box and a red circle '2'. The right sidebar shows project information for 'D012938'.

Number	Trade	Building	Location	Description
PL-0003	Fire Protection	X077	3rd Floor	Missing Cover
PL-0001	Structural	X077	1st Floor	Slab Reinforce
PL-0001	Architectural	X077	West Facade	Areaway
PL-0003	Architectural	X077	East Elevation	Parapet Coping

3. Enter AEoR Comment (Optional)
4. Click **Send Punch List to PO**

The screenshot shows the 'Send Punch List to PO' dialog box overlaid on the system interface. The dialog box contains a confirmation message: 'Please confirm that you wish to send the punch list to the PO.' Below this is a text input field for 'AEoR Comment', which is highlighted with a red box and a red circle '1'. At the bottom of the dialog box, the 'Send Punch List to PO' button is highlighted with a red box and a red circle '2'. The dialog box also displays a table of items to be submitted.

LLW/Design No.	Number	Trade	Building	Location	Subject	Status
D012938 - X077	PL-0001	Architectural		West Facade	Areaway	Draft
D012938 - X077	PL-0002	Elevators		Lobby	Doors	Draft
D012938 - X077	PL-0003	Architectural		East Elevation	Parapet Coping	Draft

Accepts or Disputes Punch List

1. Go to **Messages** > Open message with subject **AEoR Submitted Punch List**
2. Click **Open in Kahua**

The screenshot shows the Messages app interface. On the left sidebar, the 'Messages' icon is highlighted with a red box and a '1'. The main inbox view shows an email with the subject 'AEoR Submitted Punch List D012938 - X077 on C000080185 - X077 C80185 New Bldg, Reno,Early Demo', which is also highlighted with a red box and a '2'. The email details on the right show a link to 'Open in Kahua' highlighted with a red box and a '3'.

3. Select item added by SPO/DPM/DM or has the status AEoR Submitted under the desired punch list

The screenshot shows the Kahua project information screen. A table of punch list items is displayed. The item 'PL-0003 Architectural X077 East Elevation Parapet Coping AEoR Submitted' is highlighted with a red box and a '2'. The table has the following columns: Number, Trade, Building, Location, Description, and Status.

Number	Trade	Building	Location	Description	Status
D019986 - X077					
PL-0003	Fire Protection	X077	3rd Floor	Missing Cover	Draft
PL-0001	Structural	X077	1st Floor	Slab Reinforcement	Draft
D012938 - X077					
PL-0001	Architectural	X077	West Facade	Areaaway	AEoR Submitted
PL-0003	Architectural	X077	East Elevation	Parapet Coping	AEoR Submitted
PL-0002	Elevators	X077	Lobby	Doors	AEoR Submitted

Option 1: Click SEND PUNCH LIST TO GC

The screenshot shows the 'Punch Lists' application interface. At the top, the title bar reads 'Punch Lists' and 'C000080185 - X077 C80185 New Bldg, Reno, Early Demo'. The user is identified as 'Kaylie SCA PO A SCA Sandbox'. The main content area is divided into a table of punch list items and a 'PROJECT INFORMATION' panel on the right. The table has columns for 'Number', 'Trade', 'Building', 'Location', 'Description', and 'Status'. The 'SEND PUNCH LIST TO GC' button is highlighted with a red box and a red circle with the number 1. The item 'PL-0003 Architectural X077 East Elevation Parapet Coping AEoR Submitted' is highlighted with a red box and a red circle with the number 2. The 'PROJECT INFORMATION' panel on the right shows details for 'PL-0003 Parapet Coping', including 'Expense Contract', 'Project Type', 'Design Number', and 'General Contractor'.

Number	Trade	Building	Location	Description	Status
D019986 - X077					
PL-0003	Fire Protection	X077	3rd Floor	Missing Cover	Draft
PL-0001	Structural	X077	1st Floor	Slab Reinforcement	Draft
D012938 - X077					
PL-0001	Architectural	X077	West Facade	Areaway	AEoR Submitted
PL-0003	Architectural	X077	East Elevation	Parapet Coping	AEoR Submitted
PL-0002	Elevators	X077	Lobby	Doors	AEoR Submitted

5 Item(s)

PROJECT INFORMATION

Expense Contract: C000080185 - JE Construction
Project Type: CIP
Design Number: LLW
D019986: 121693 - (PHASE II) EXISTING SCHOOL F
D012938: 111705 - BUILDING ADDITION
D012938: 121695 - EARLY DEMO PKG. (PHASE I)

General Contractor: Jordan External Contractor A
Project Officer: Kaylie SCA PO A
Senior Project Officer: Natalia SCA SPO Bronx
Chief Project Officer: Ed SCA CPO Bronx
AE DM: Brad SCA AE DM
AEoR: Adam SCA In House AEoR

Dispute

Enter Comments (optional) then click Send Punch List to GC

The screenshot shows the 'Punch Lists' application interface with a 'PO Review Punch List' dialog box open. The dialog box has a title bar 'PO Review Punch List' and a close button. It contains a text area for 'PO Comment' highlighted with a red box and a red circle with the number 1. Below the text area is a table of punch list items. At the bottom of the dialog box, the 'Send Punch List to GC' button is highlighted with a red box and a red circle with the number 2. The background shows the 'Punch Lists' application interface with the 'SEND PUNCH LIST TO GC' button highlighted.

Please confirm if you wish to send the punch list to the GC for acknowledgement.

PO Comment

LLW/Design No.	Number	Subject	Status
D012938 - X077	PL-0001	Areaway	AEoR Submitted
D012938 - X077	PL-0002	Doors	AEoR Submitted
D012938 - X077	PL-0003	Parapet Coping	AEoR Submitted

Send Punch List to GC

Dispute

5 Item(s)

Option 2: Select item with the AEO Submitted status > Click **Dispute**

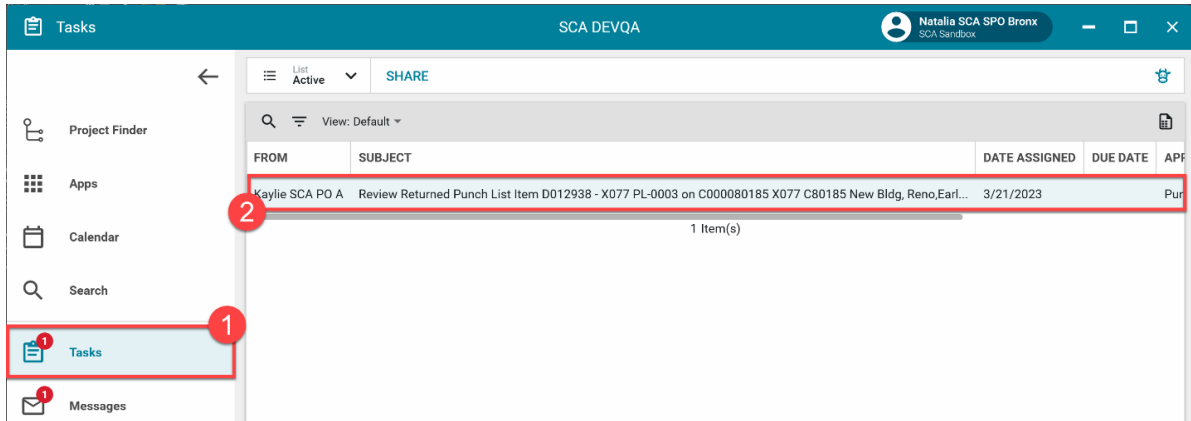
The screenshot shows the 'Punch Lists' application interface. At the top, the header includes 'Punch Lists', the project ID 'C000080185 - X077 C80185 New Bldg, Reno,Early Demo', and the user 'Kaylie SCA PO A SCA Sandbox'. Below the header is a navigation bar with 'SEND PUNCH LIST TO GC', 'SEND', 'HISTORY', and 'URL' options. The main area is divided into a table on the left and a 'PROJECT INFORMATION' panel on the right. The table has columns for 'Number', 'Trade', 'Building', 'Location', 'Description', and 'Status'. It lists items under two categories: 'D019986 - X077' and 'D012938 - X077'. The item 'PL-0003 Architectural X077 East Elevation Parapet Coping AEO R S' is highlighted with a red box and a red circle with the number '1'. The 'PROJECT INFORMATION' panel on the right shows details for 'PL-0003 Parapet Coping', including 'Expense Contract', 'Project Type', 'Design Number', and 'LLW'. A 'Dispute' button is located at the bottom right of the panel, highlighted with a red box and a red circle with the number '2'. The bottom status bar shows the login time and version information.

Enter **PO Comment** > Click **Continue**

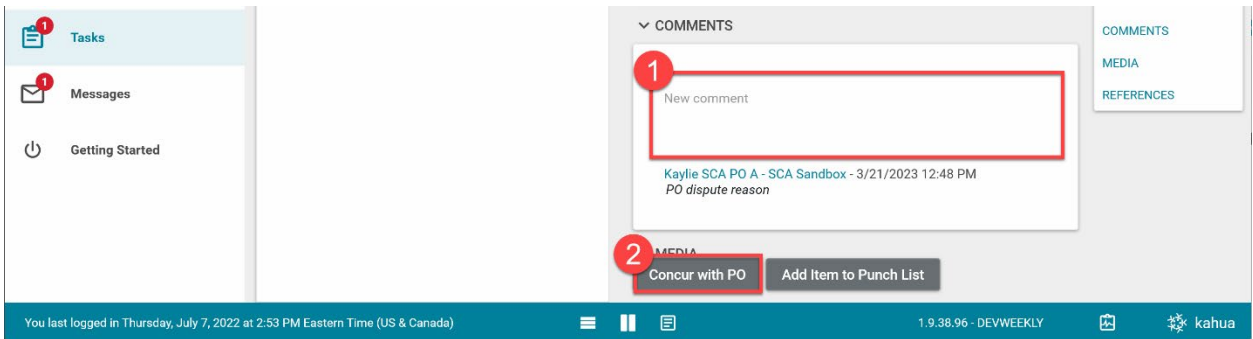
The screenshot shows the 'Dispute Item' dialog box overlaid on the application. The dialog has a title bar 'Dispute Item' and a close button. It contains a 'REASON' section with a text input field. A red box and a red circle with the number '1' highlight the input field, which contains the text 'Please enter the reason for disputing item PL-0001. (attachments not required)'. Below the input field is a 'PO Comment' label and a red error message 'Field is required.'. There is also a 'MEDIA' section with a 'SELECT' button and an 'ADD' button. At the bottom right of the dialog, there are 'Continue' and 'Cancel' buttons. The 'Continue' button is highlighted with a red box and a red circle with the number '2'. The background shows the same application interface as the previous screenshot, but the 'Dispute' button is now disabled.

SPO Concur or Adds Item to Punch List

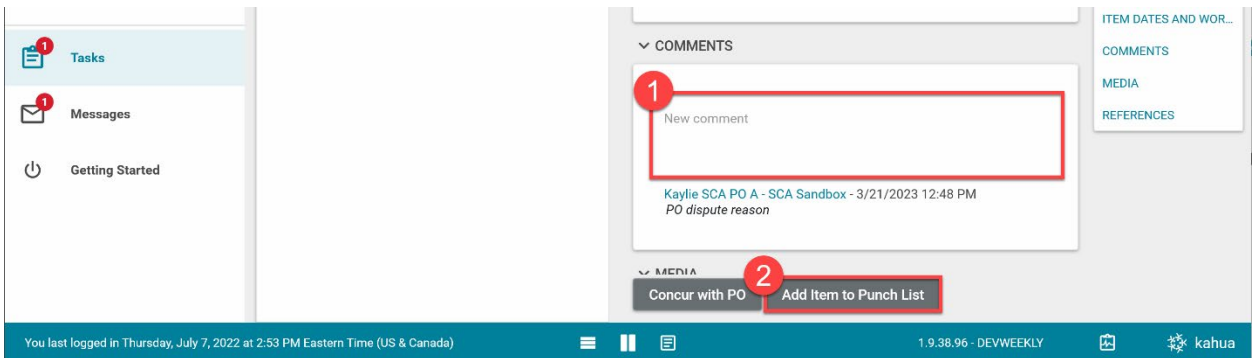
1. Go to **Tasks** > Open task with subject **Review Returned Punch List Item**



Option 1: Enter Comments > Click Concur with PO



Option 2: Enter Comments > Add Item to Punch List

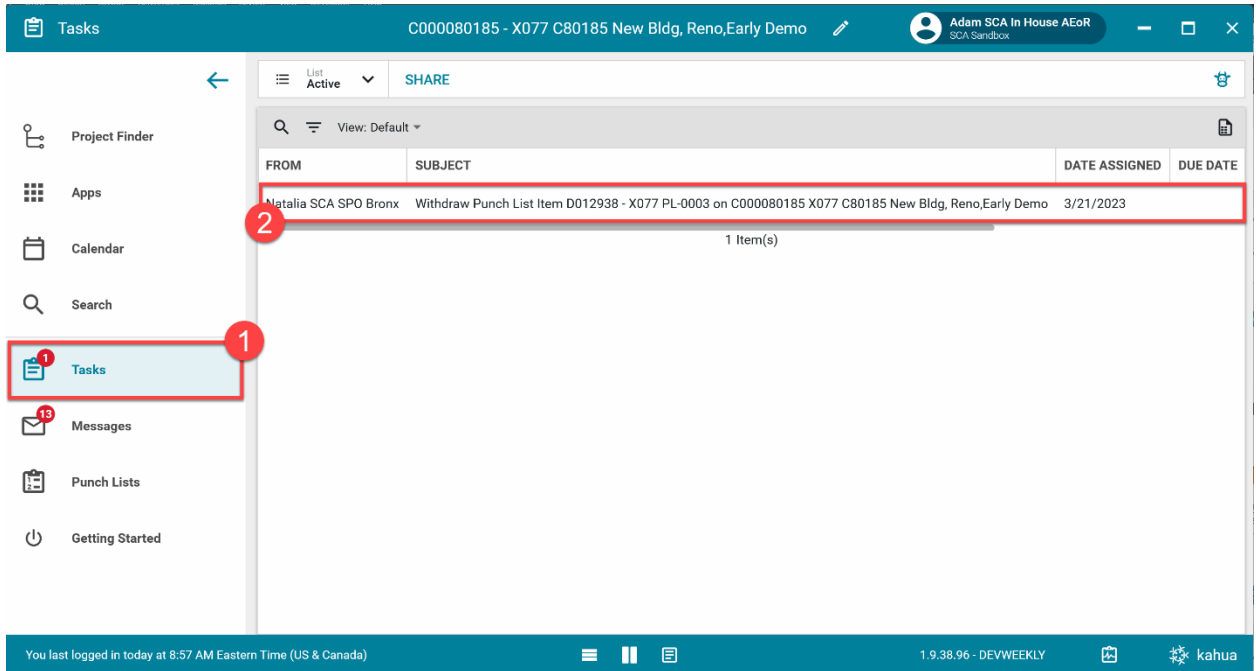


A task is generated for the AEO to Withdraw Disputed Punch List item.

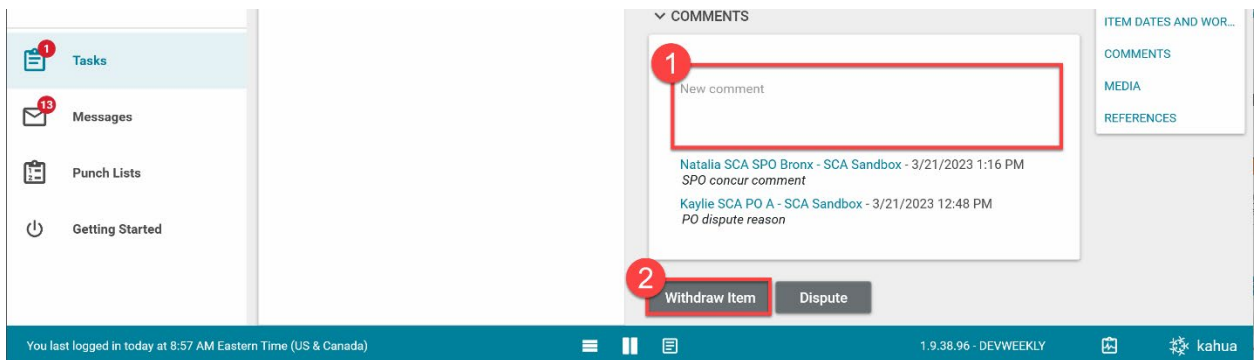
AEoR Withdraws Item or Disputes Withdrawal

SPO has concurred with the PO on the disputed punch list item.

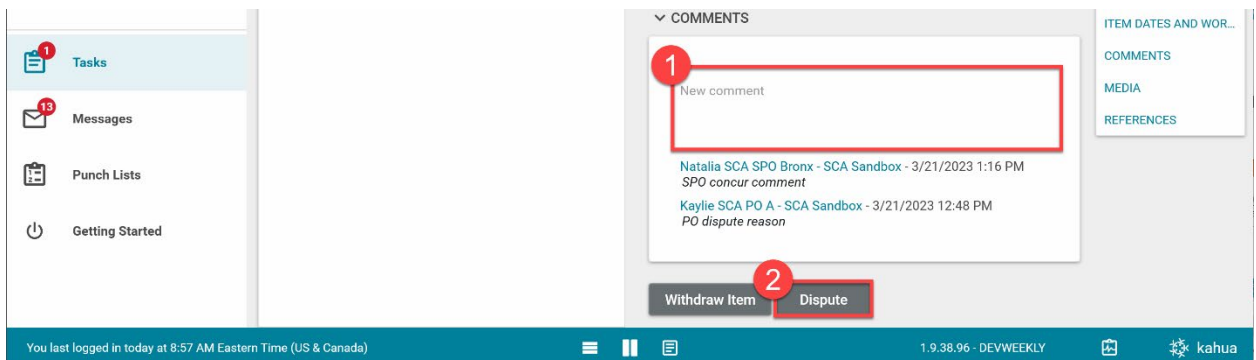
1. Go to **Tasks** > Open task with subject **Withdraw Punch List Item**



Option 1: Enter Comments > Click **Withdraw Item**



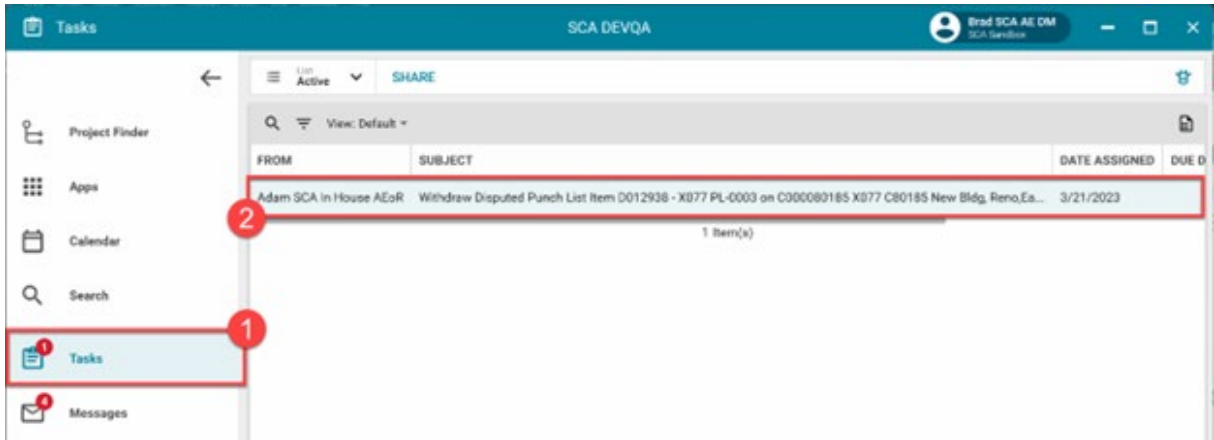
Option 2: Enter Comments > Click **Dispute**



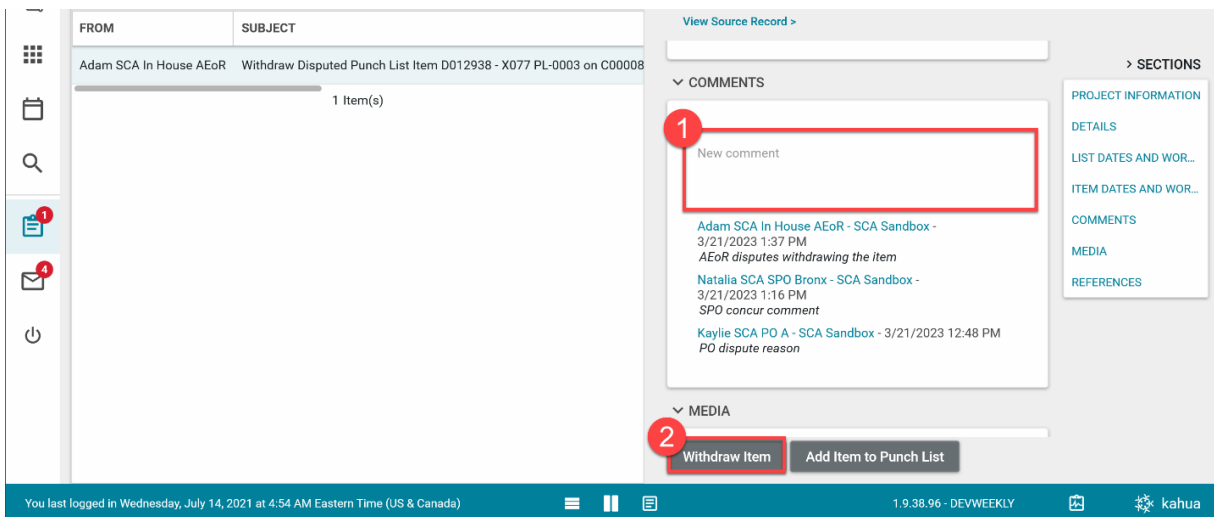
A task is generated for the DPM/DM to Withdraw Disputed Punch List item.

DPM/DM Withdraws Item or Adds Item to Punch List

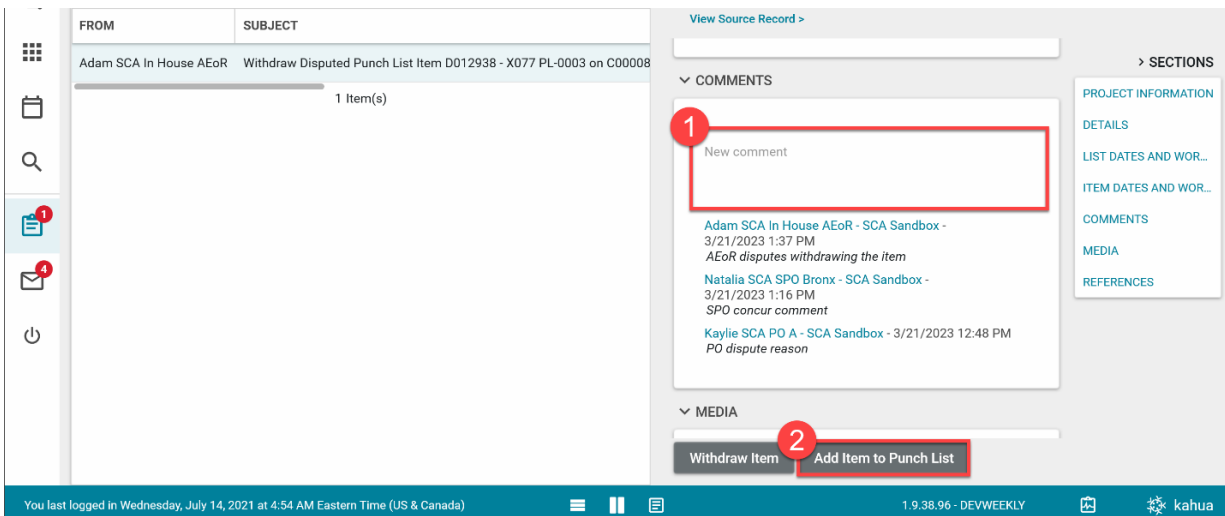
1. Go to **Tasks** > Open task with subject **Withdraw Disputed Punch List Item**



Option 1: Enter Comments > Click **Withdraw Item**

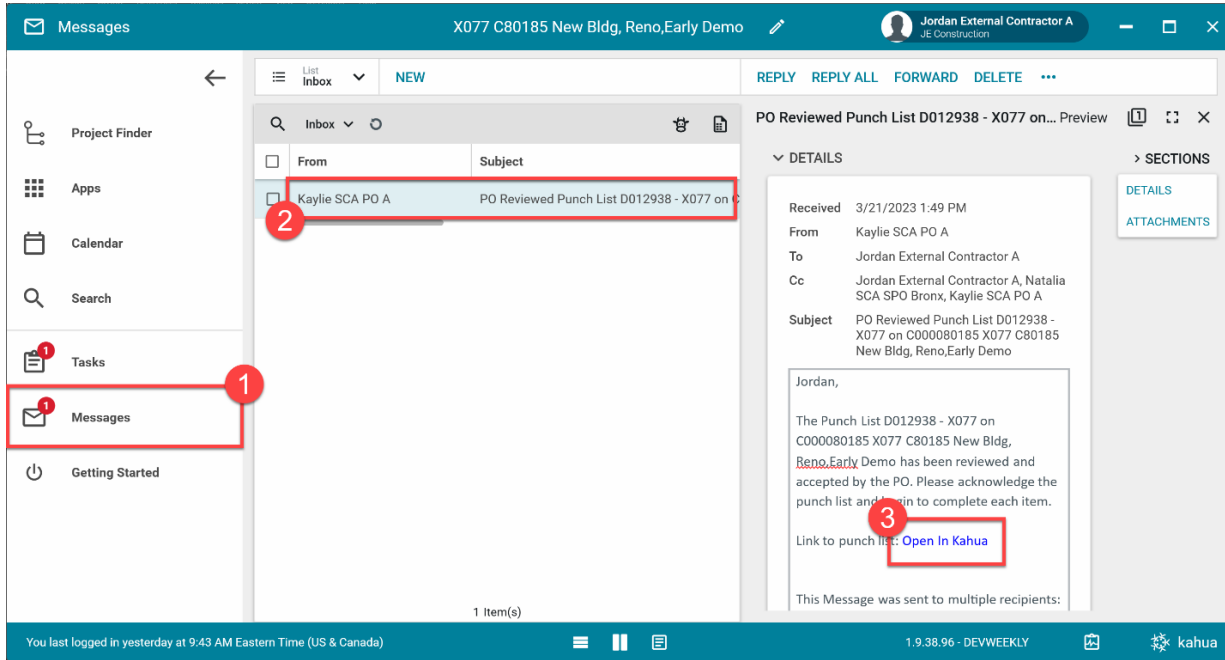


Option 2: Enter Comments > **Add Item to Punch List**

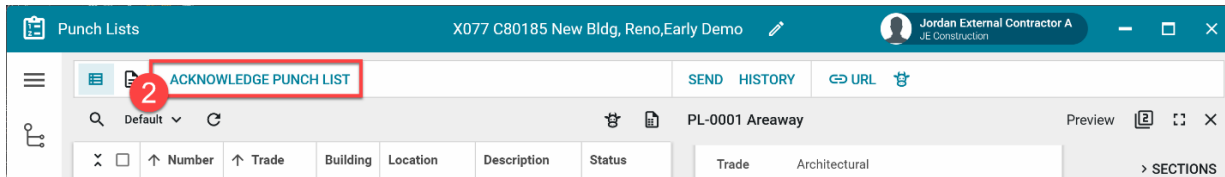


GC Acknowledges Punch List

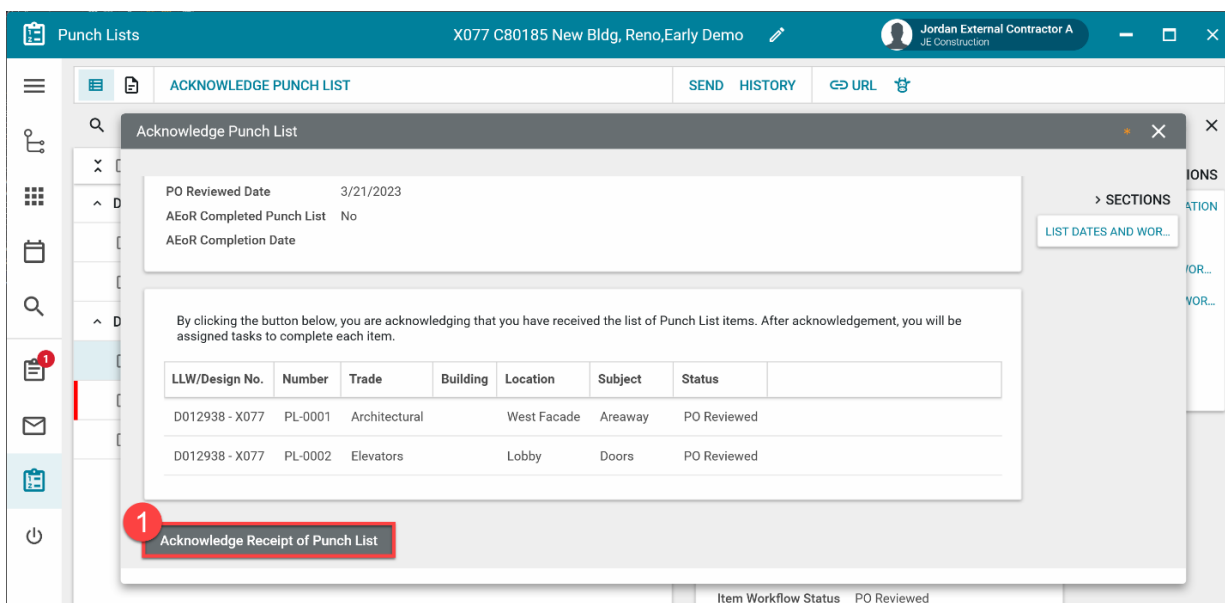
1. Go to **Messages** > Open message with subject **PO Reviewed Punch List** > Click **Open in Kahua**



2. Select item in the desired punch list with the status **PO Reviewed** > Select **ACKNOWLEDGE PUNCH LIST**



3. Click **Acknowledge Receipt of Punch List**

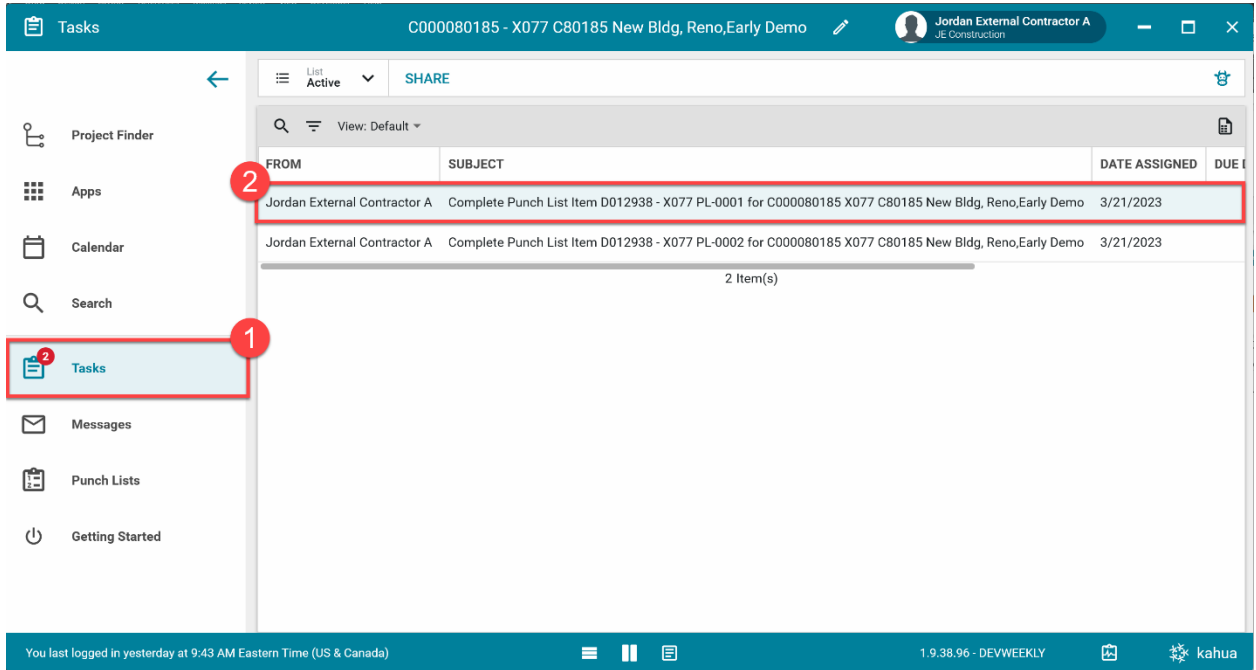


The GC acknowledges the punch list and receives tasks to complete each item.

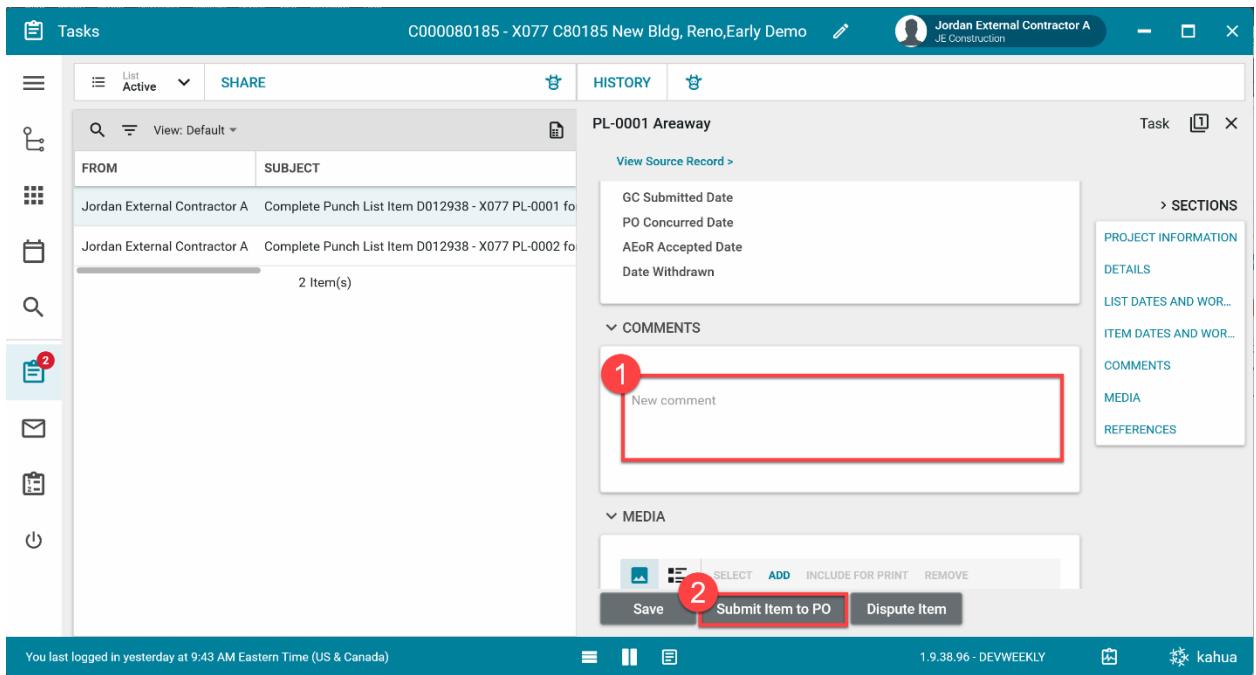
GC Completes Acknowledged Punch List Items

For GC who Acknowledged Punch List

1. Go to **Tasks**
2. Select the Complete Punch List Item task (or go to the item in the Punch List app)

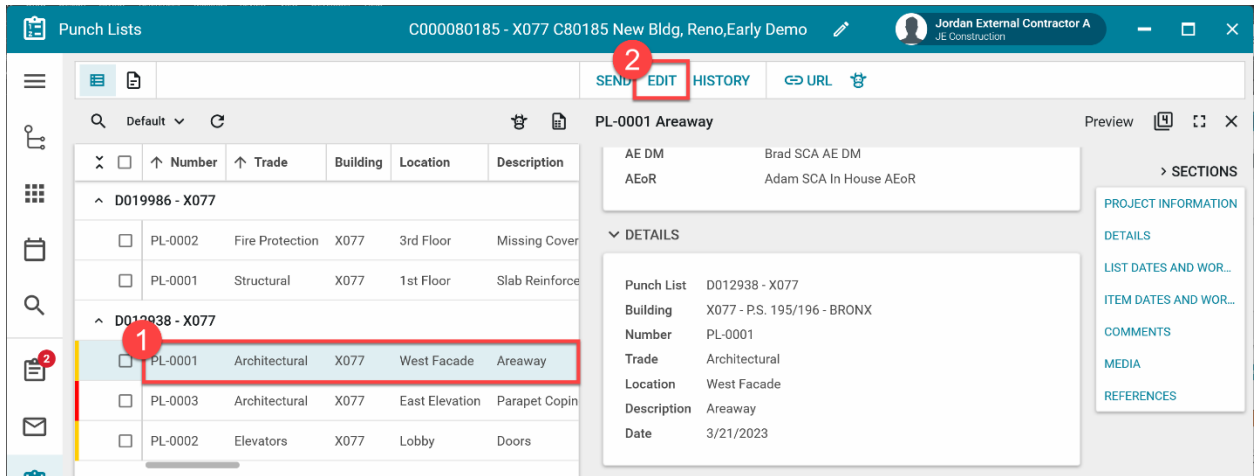


3. Add a **Comment**
4. Click **Submit Item to PO**

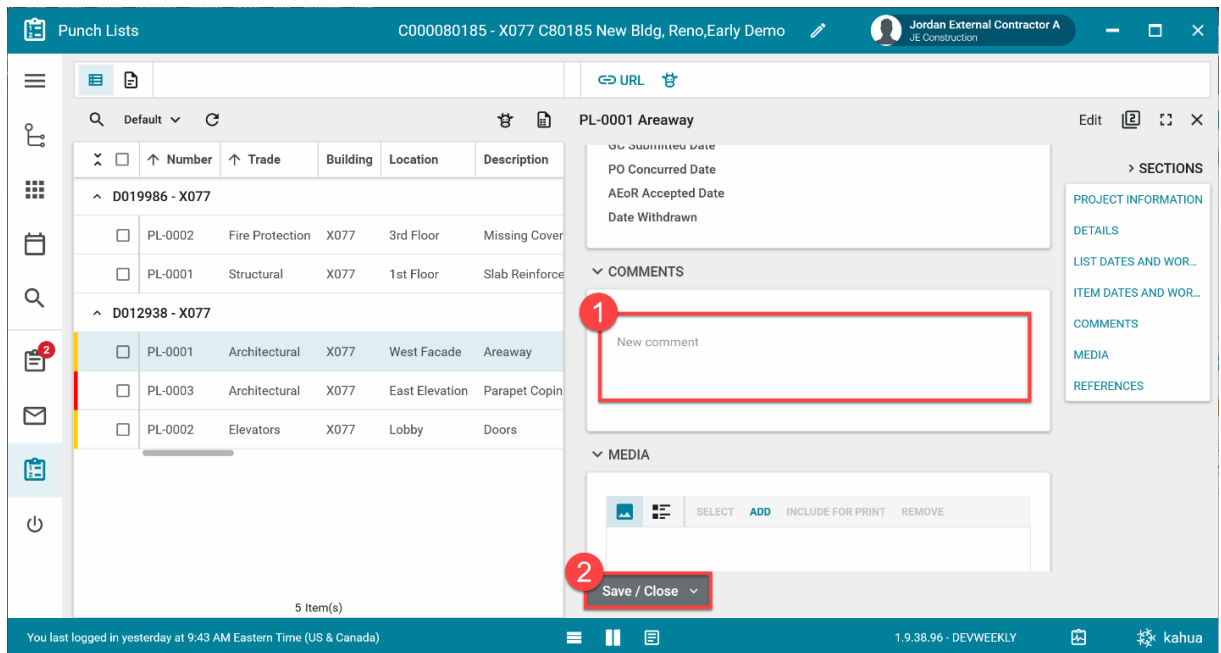


for Others

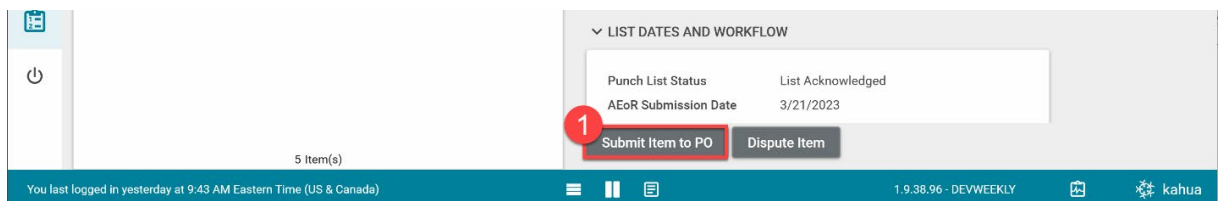
1. In the **Punch Lists app**, select the desired item
2. Click **Edit**



3. Add a **Comment**
4. Click **Save / Close**

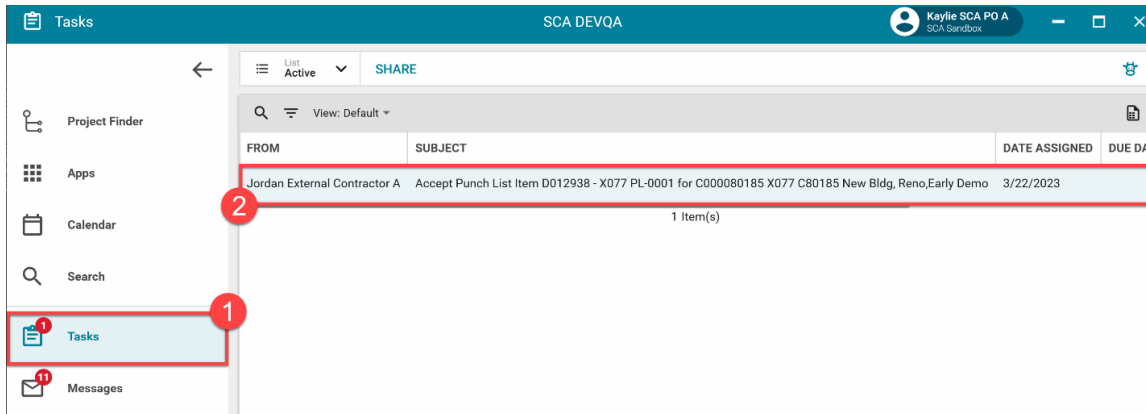


5. Click **Submit Item to PO**

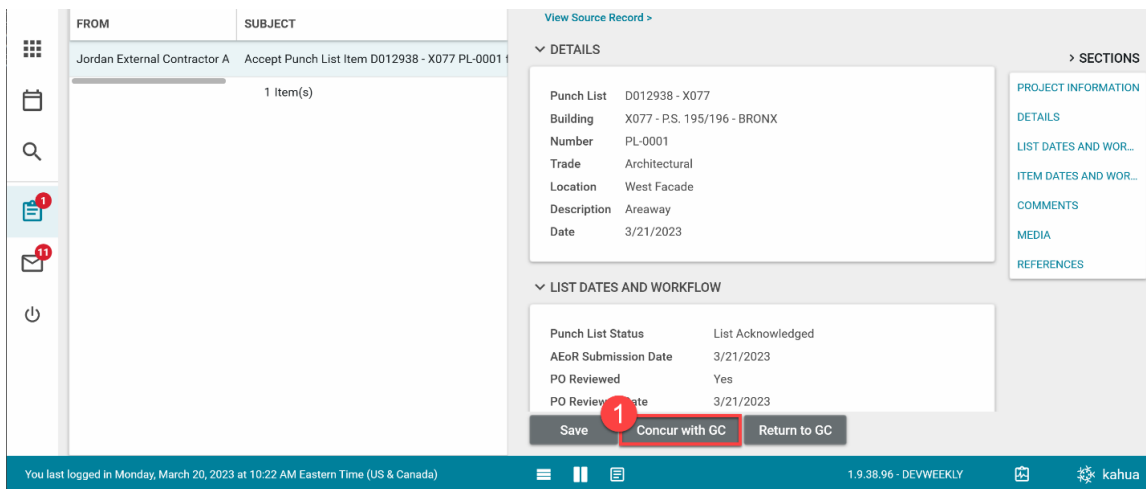


PO Concur or Returns to GC

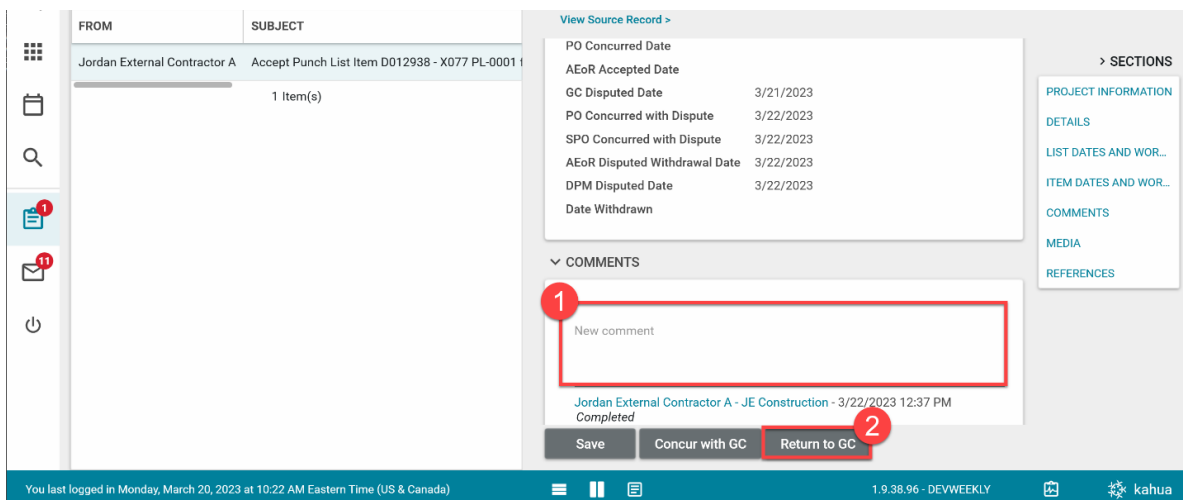
1. Go to **Tasks** > Open task with subject **Accept Punch List Item**



Option 1: Click Concur with GC



Option 2: Enter Comments > Click Return to GC.

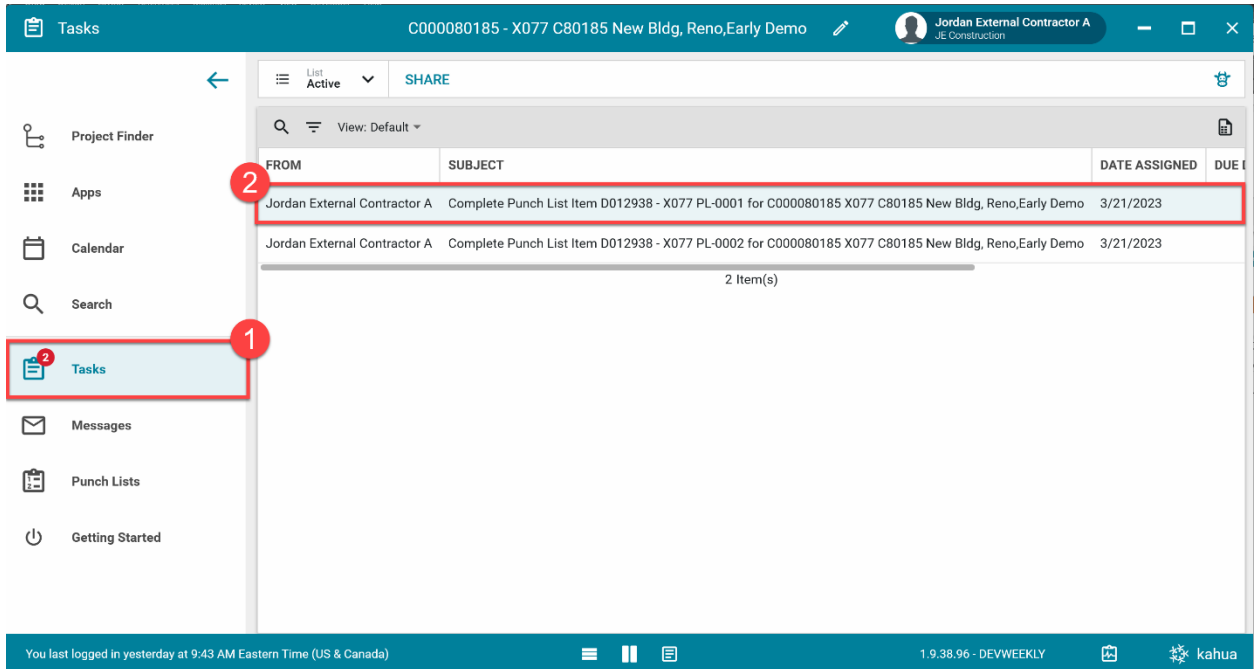


If the PO concurs with the GC, the item is available for the AEO to accept. However, there is no notification until all items in the list have been concurred by PO or withdrawn.

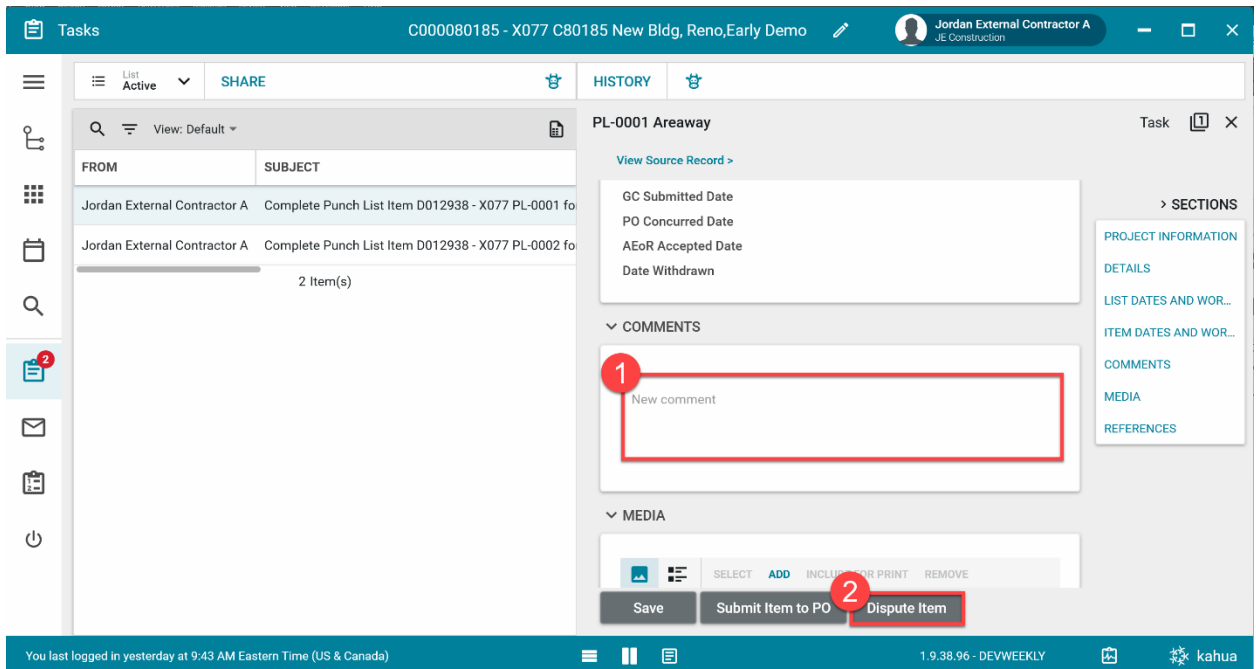
Dispute Acknowledged Punch List Items

GC Disputes Acknowledged Punch List Item

1. Go to Tasks > Select the Complete Punch List Item task (you can also select the item in the Punch List app)

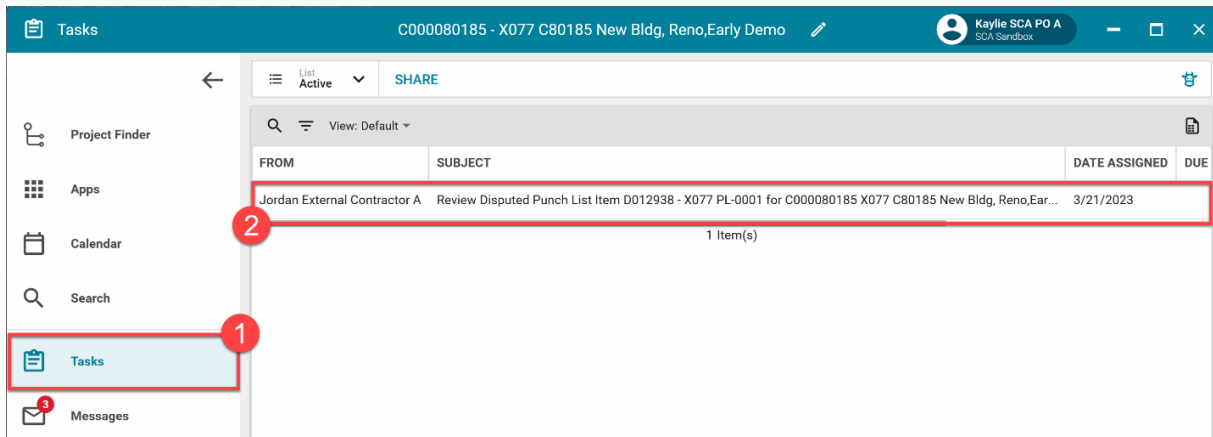


2. Add a **Comment** > Click **Dispute Item**

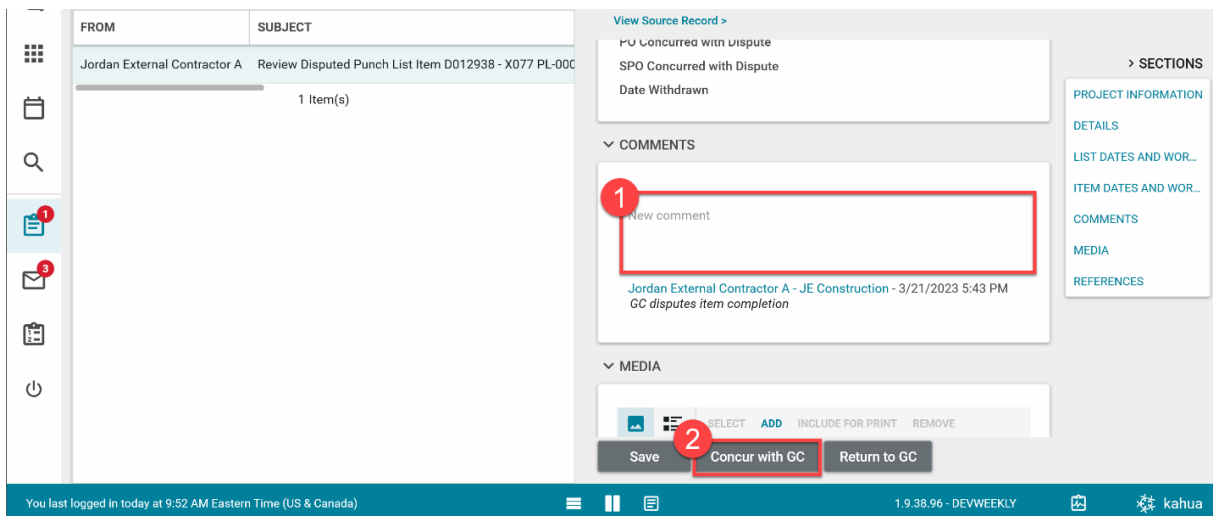


PO Concur or Returns Disputed Item to GC

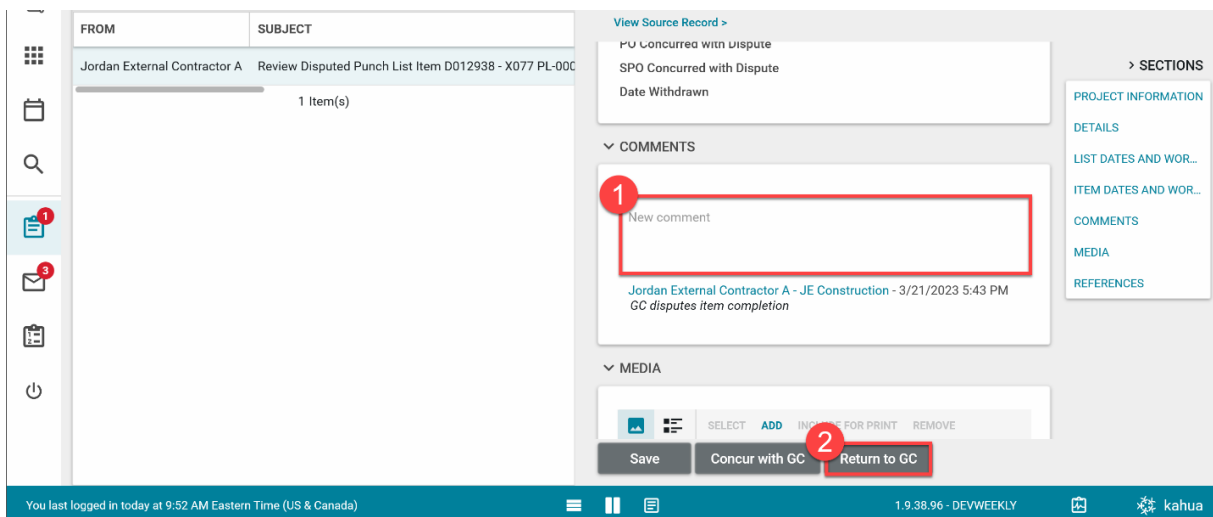
1. Go to Tasks > Open task with subject Review Disputed Punch List Item



Option 1: Enter Comments > Click Concur with GC

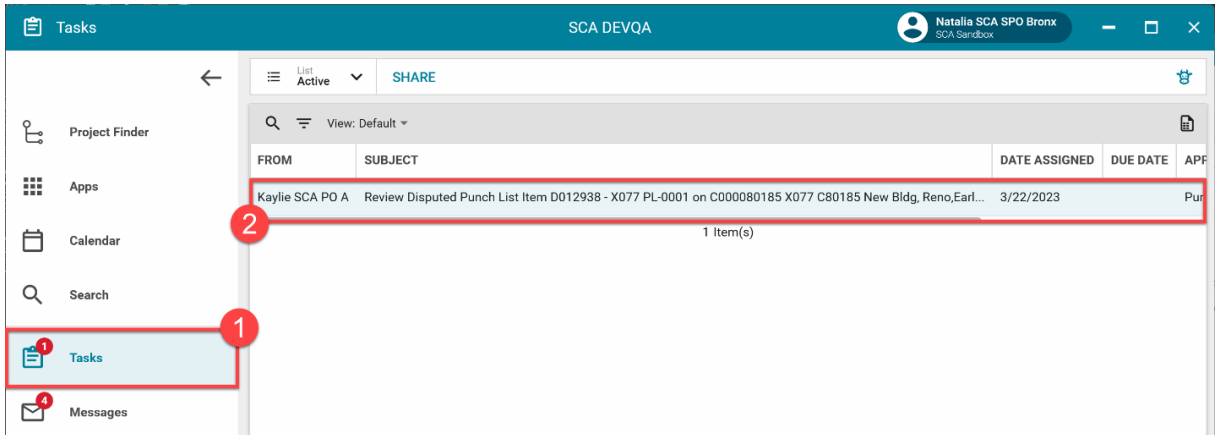


Option 2: Enter Comments > Click Return to GC

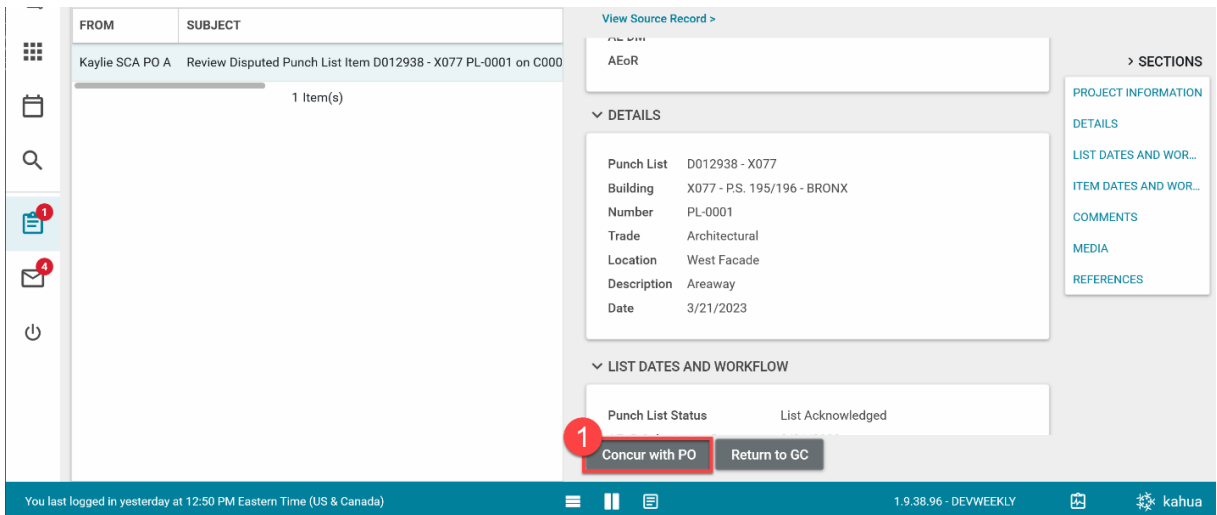


SPO Concur or Returns Disputed Item to GC

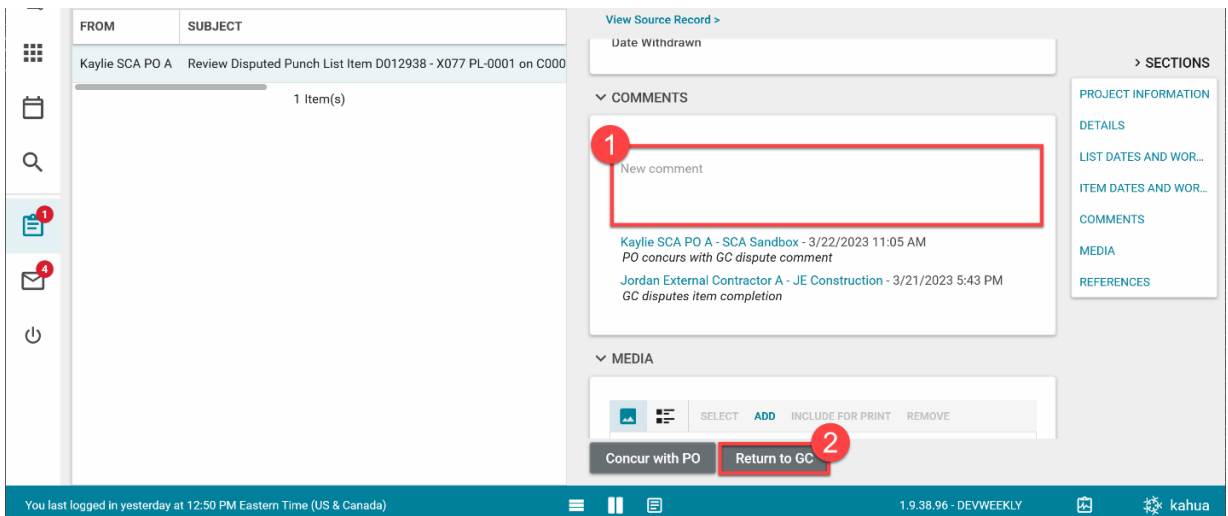
1. Go to **Tasks** > Open task with subject **Review Disputed Punch List Item**



Option 1: Enter **Comments**> Click **Concur with PO**

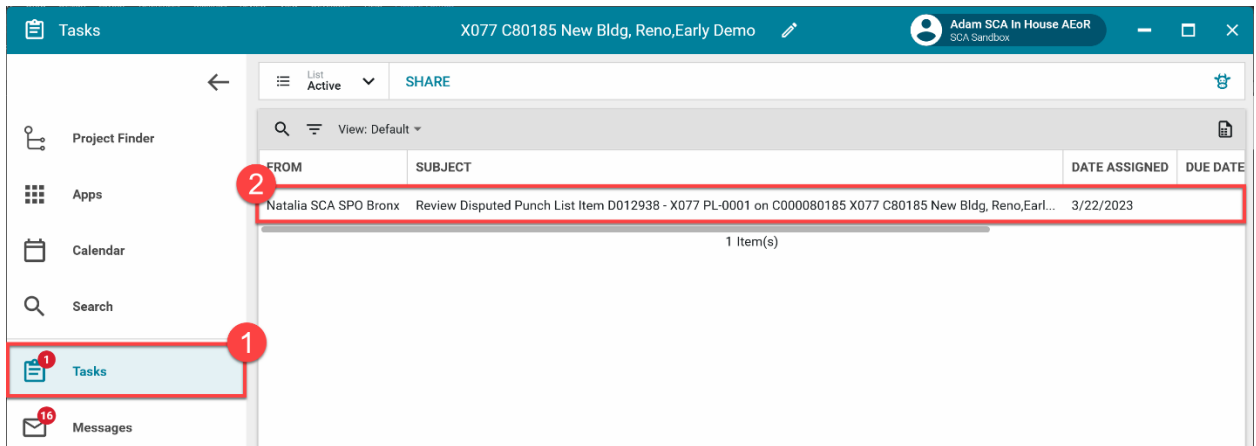


Option 2: Enter **Comments**> Click **Return to GC**

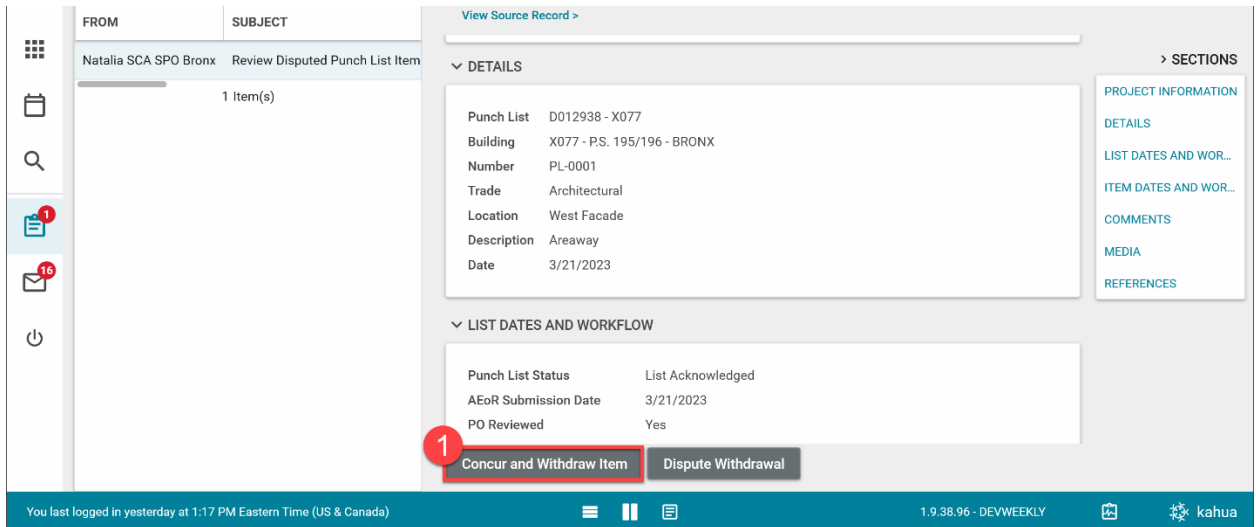


AEoR Withdraws Item or Disputes Withdrawal

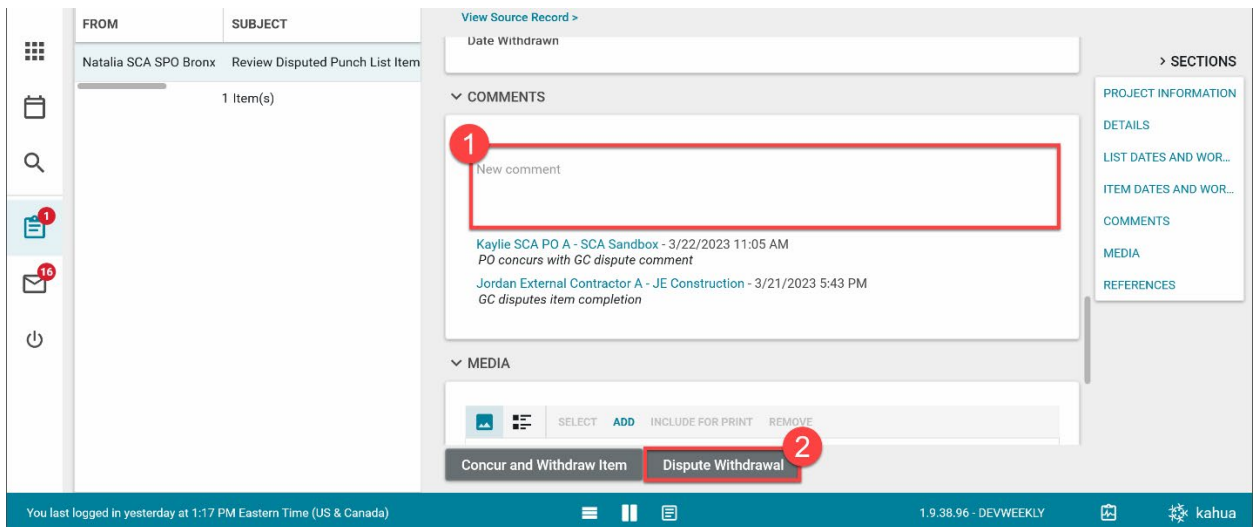
1. Go to **Tasks** > Open task with subject **Review Disputed Punch List Item**



Option 1: Click Concur and Withdraw Item

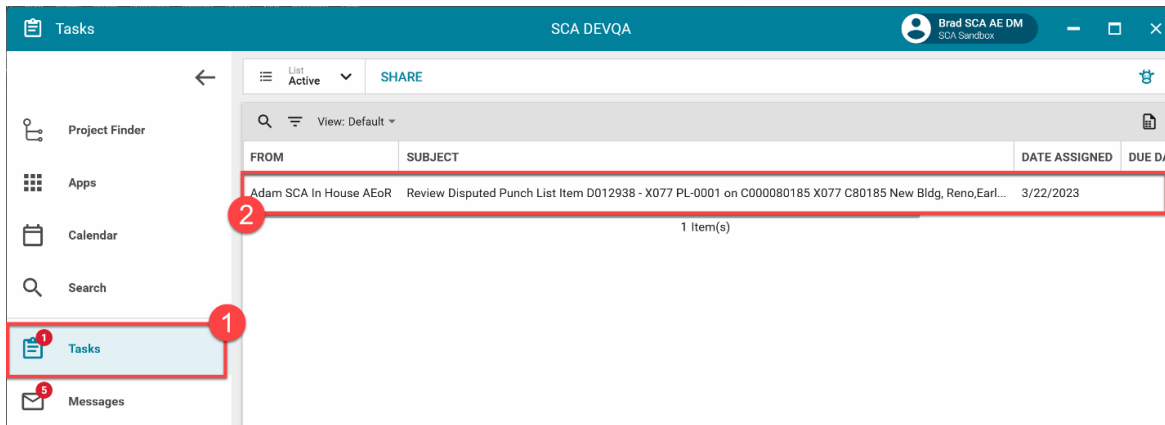


Option 2: Enter Comments > Click Dispute Withdrawal

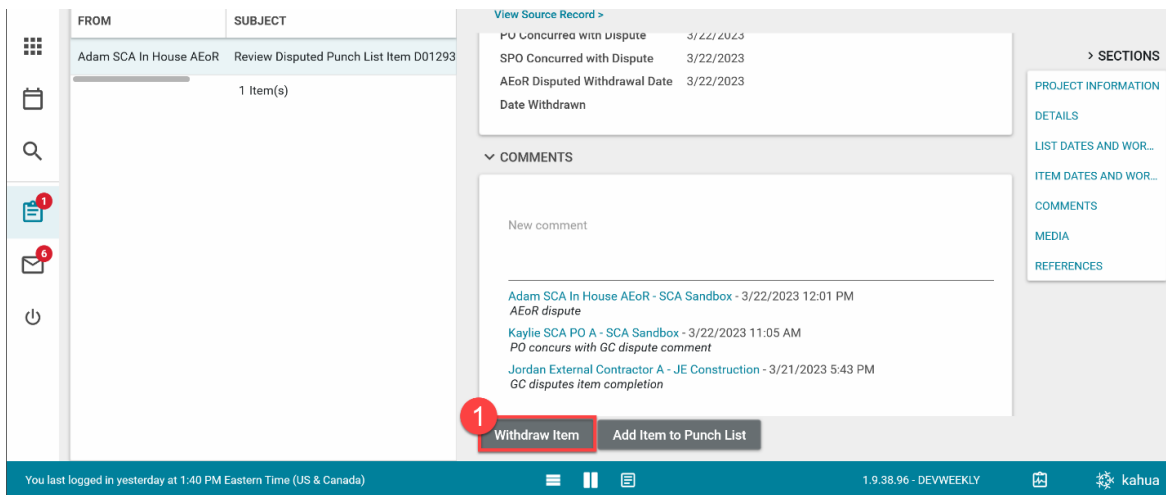


DPM/DM Withdraws or Adds Item to Punch List

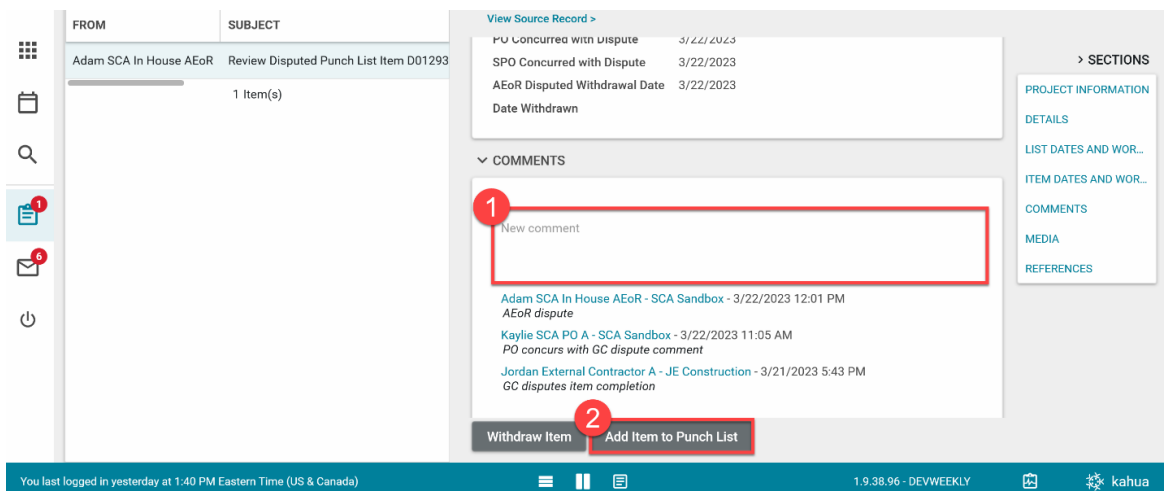
1. Go to **Tasks** > Open task with subject **Review Disputed Punch List Item**



Option 1: Enter Comments > Click Withdraw Item

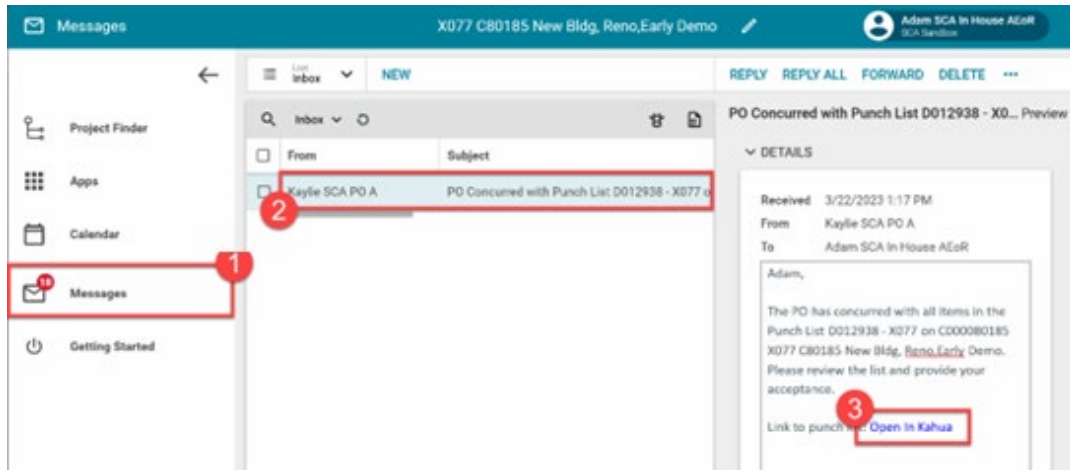


Option 2: Enter Comments > Click Add Item to Punch List

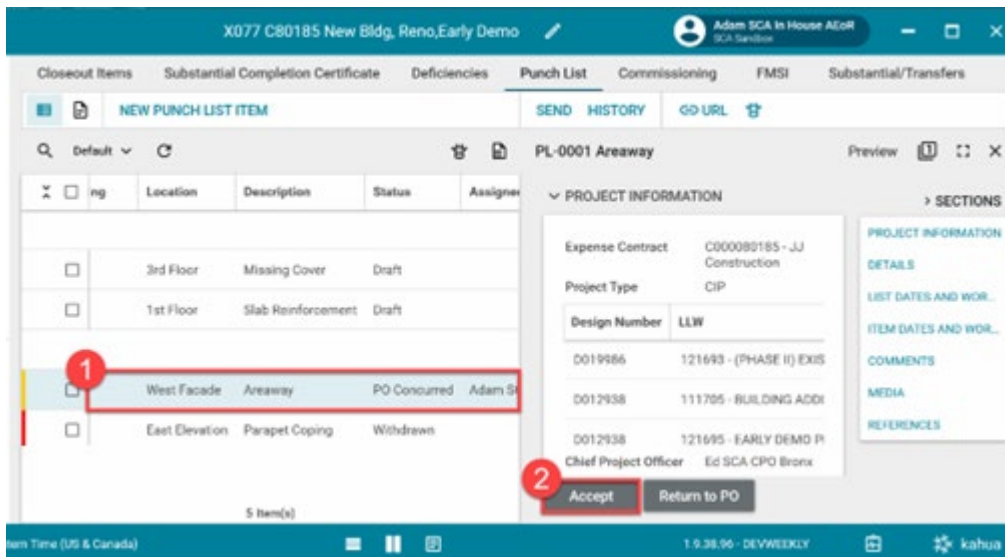


AEoR Accepts or Returns Completed Item

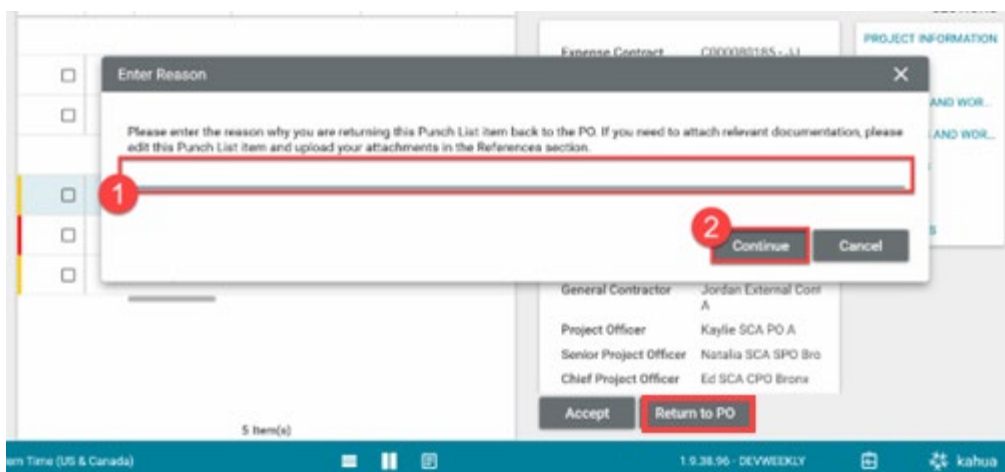
1. Go to **Messages** > Open message with subject **PO Concurred with Punch List** > Select **Open in Kahua**



Option 1: Select item with the status **PO Concurred** > Click **Accept**

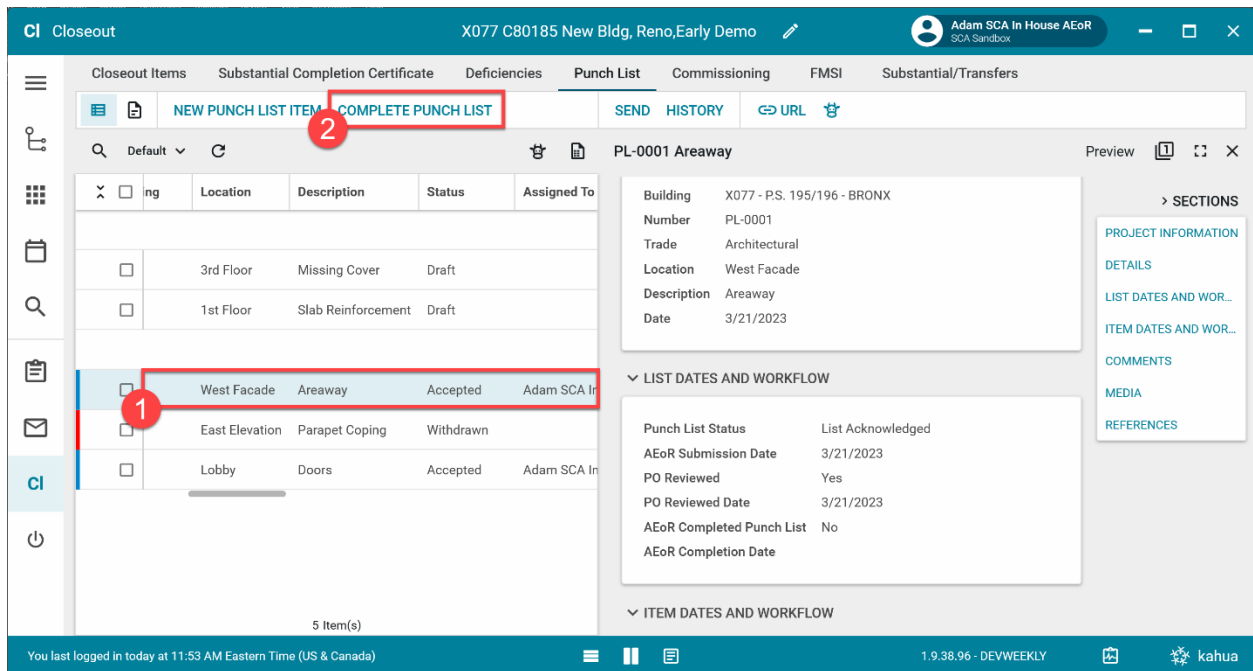


Option 2: Click **Return to PO** > Enter a Reason > Click **Continue**

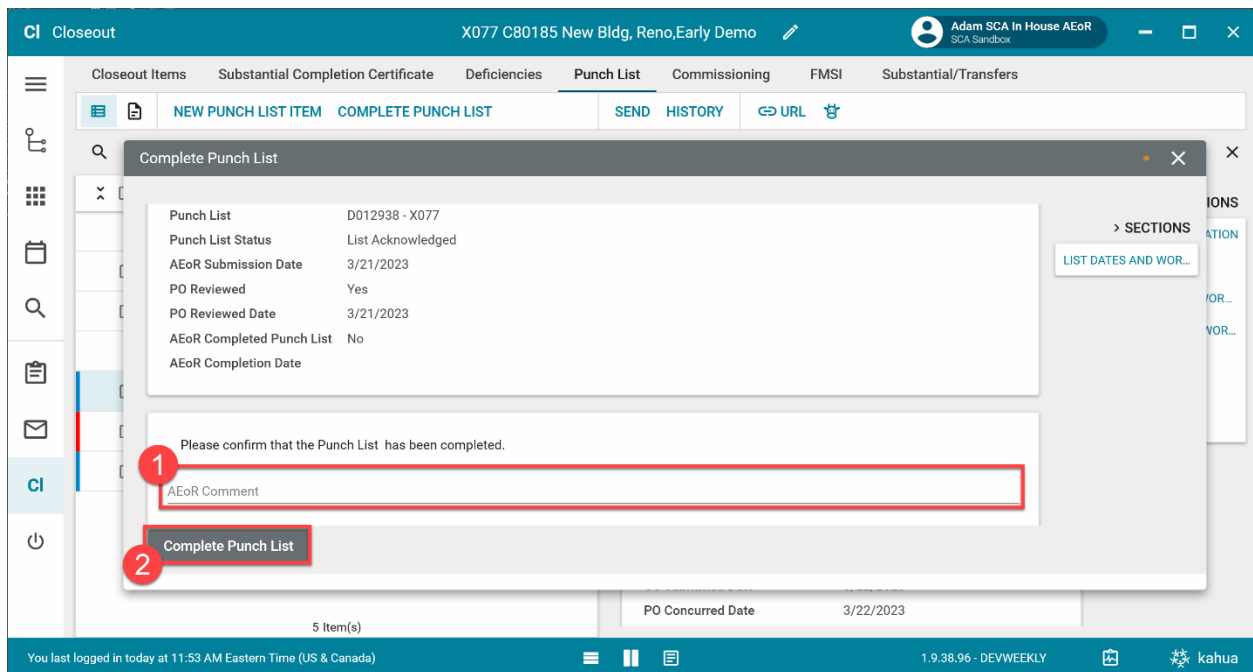


AEoR Completes Punch List

1. Select an item within the desired punch list
2. Select **COMPLETE PUNCH LIST**



3. Enter **Comment** (Optional)
4. Click **Complete Punch List**



Completed punch lists will have a green indicator on the left. In addition, the Punch List Status within the List Dates and Workflow section will be Completed.