Punch List Training Guide

Date Created: 2/17/2023
Date Updated: 7/24/2023

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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 These items will be addressed and completed by the GC or withdrawn from the list.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 AEoR 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 AEoR.
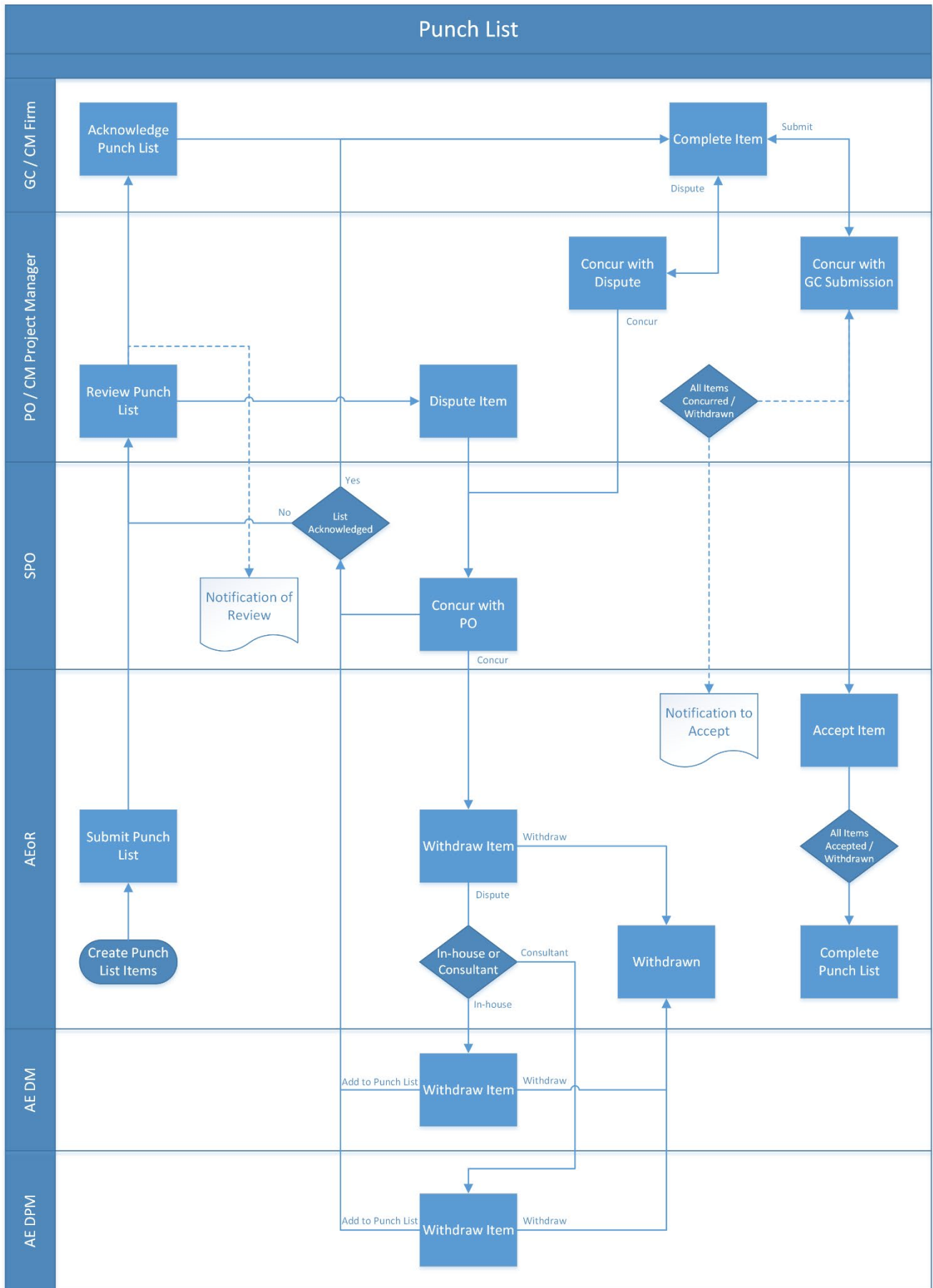
The AEoR submits each list separately to the PO to review. During the review of a punch list, the PO can return items to the AEoR for withdrawal. After the PO reviews a punch list, it is sent to the GC for acknowledgement. Once the items in the list are acknowledged, the GC will receive a task to complete or dispute individual punch list items. At any point before the punch list is completed, the AEoR 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 POs concurrence, the AEoR can accept or return the completed item. The AEoR will not be sent a notification to accept items unless all items in a punch list have been concurred by the PO or withdrawn.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 AEoR will receive a task to withdraw the disputed item from the punch list. The AEoR 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the DM (in-house projects) or DPM (consultant projects) will provide the final decision on whether the item should be withdrawn.

After every item in a punch list has been satisfied (all items have been accepted or withdrawn), the AEoR will complete the punch list.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

Punch List

GC / CM Firm

Acknowledge Punch List

Complete Item

Submit

Dispute

PO / CM Project Manager

Concur with Dispute

Concur with GC Submission

Review Punch List

Dispute Item

Concur

All Items Concurred / Withdrawn

SPO

Yes

No

List Acknowledged

Notification of Review

Concur with PO

Concur

AEoR

Notification to Accept

Accept Item

Submit Punch List

Withdraw Item

Withdraw

Withdrawn

Complete Punch List

Dispute

All Items Accepted / Withdrawn

Create Punch List Items

In-house or Consultant

Consultant

In-house

AE DM

Add to Punch List

Withdraw Item

Withdraw

AE DPM

Add to Punch List

Withdraw Item

Withdraw

Step-by-Step Instructions

AEoR Creates Punch List Item

1. Go to Project Finder > Select the desired project
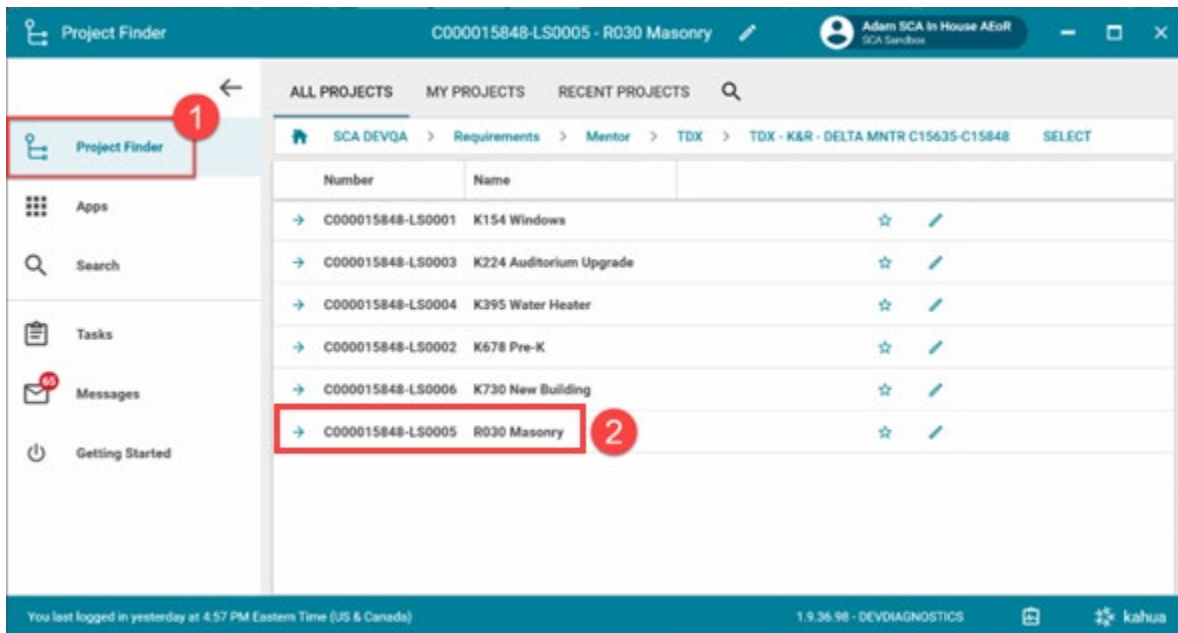
2. Go to **Apps** > **All Apps** > Select the **Closeout** App
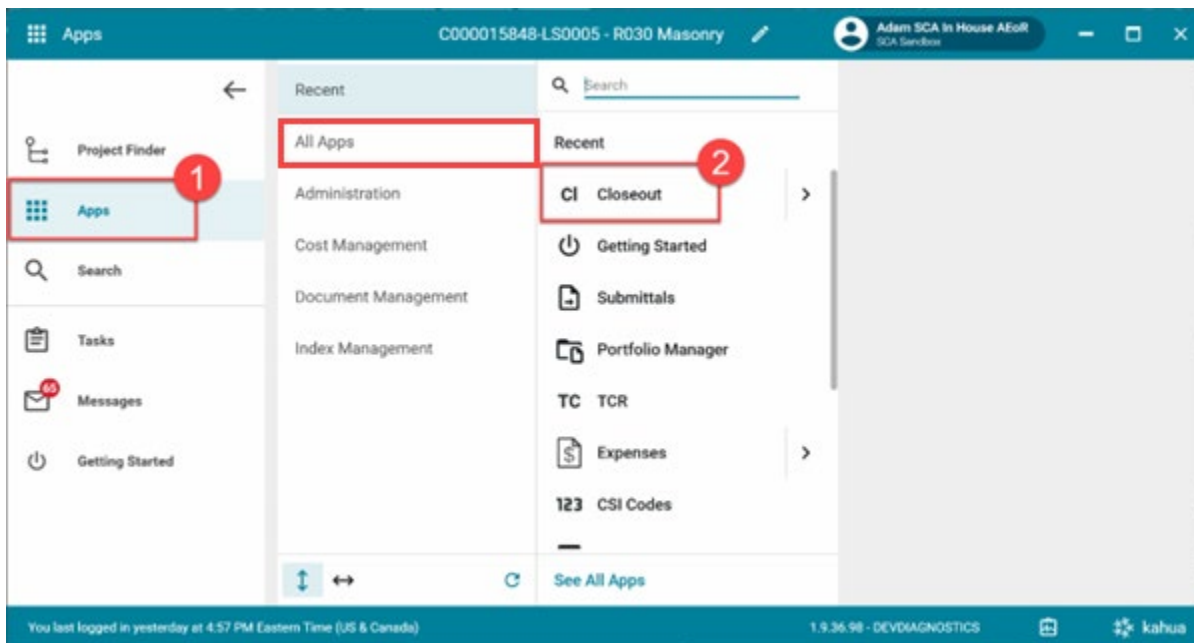
3. Select the **Punch List** tab> Click NEW PUNCH LIST ITEM
4. In the **Details** section, select
   a. LLW or Design Number
   b. Building
   c. Trade
   d. Enter a Description
5. **Media** section (Optional): Add supporting photos
6. **References** section (Optional): Add supporting documents
7. Click **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.
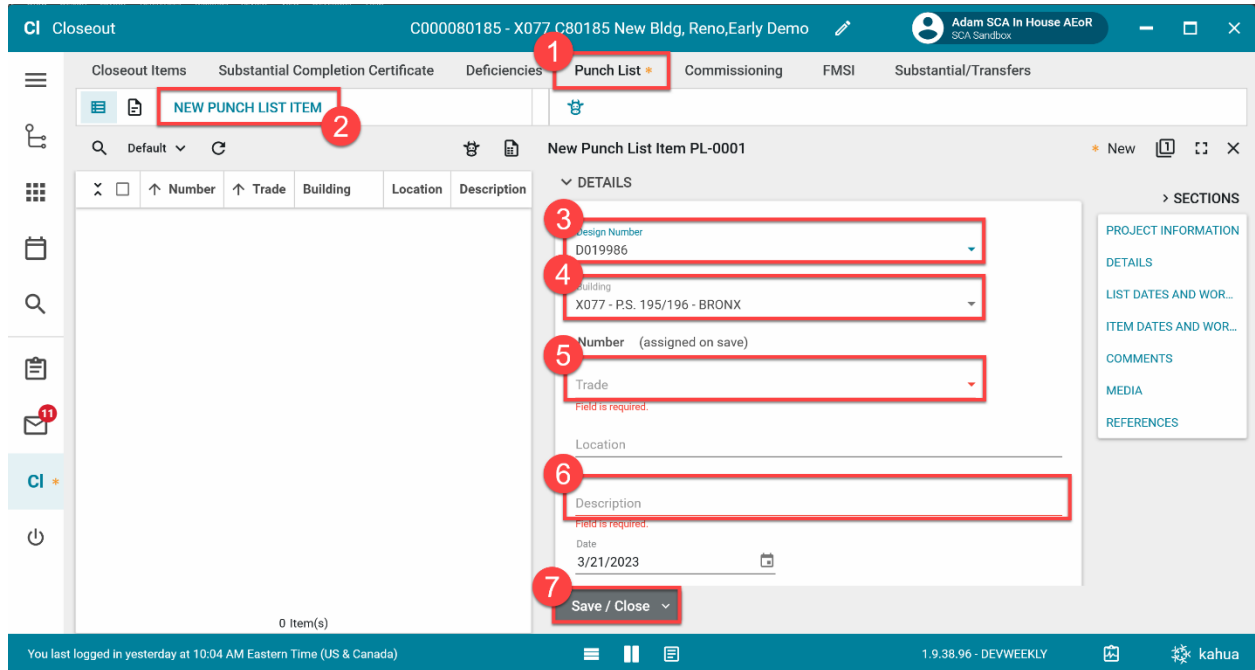
Edit Punch List Item
You can make changes to the Punch List before submitting by clicking **Edit**. Click **Save/Close** when finished.
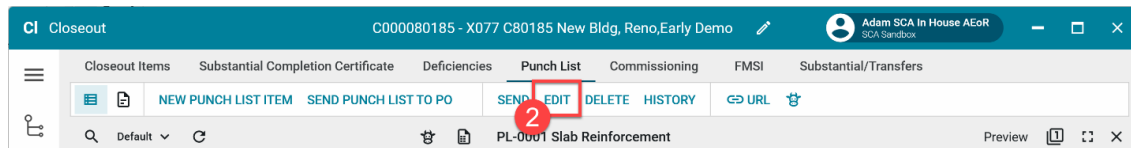
Move Item to Different Punch List

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.
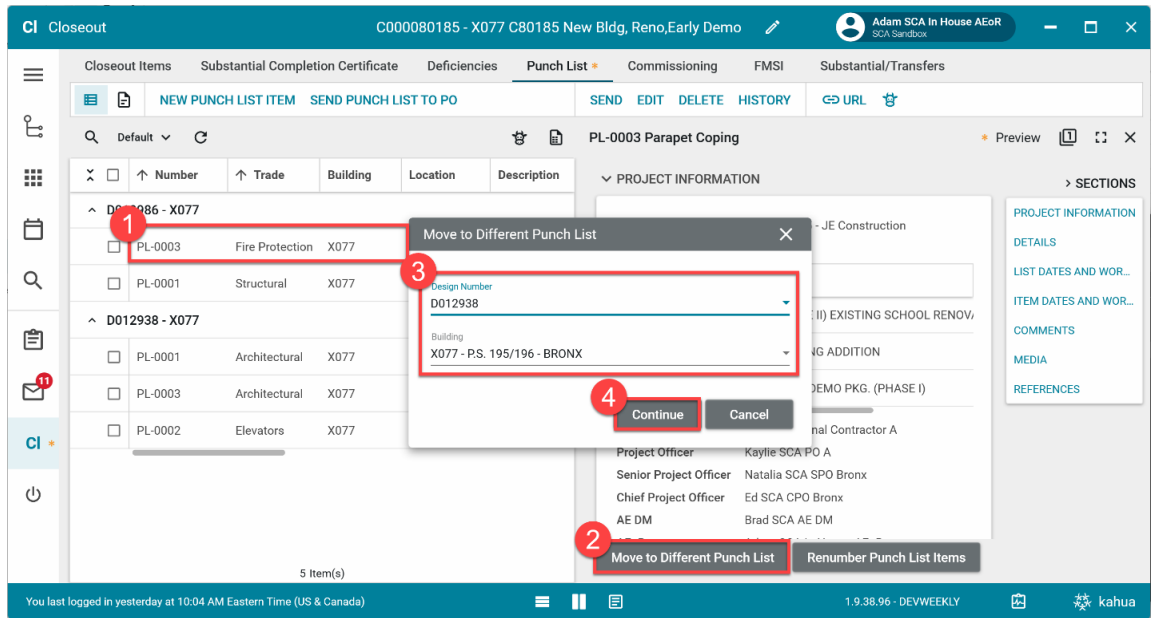
Delete Punch List Items

1. ***Delete Multiple Items:*** Select items by using **checkboxes** on the left > Click **Delete** > Click **Ok** to confirm.
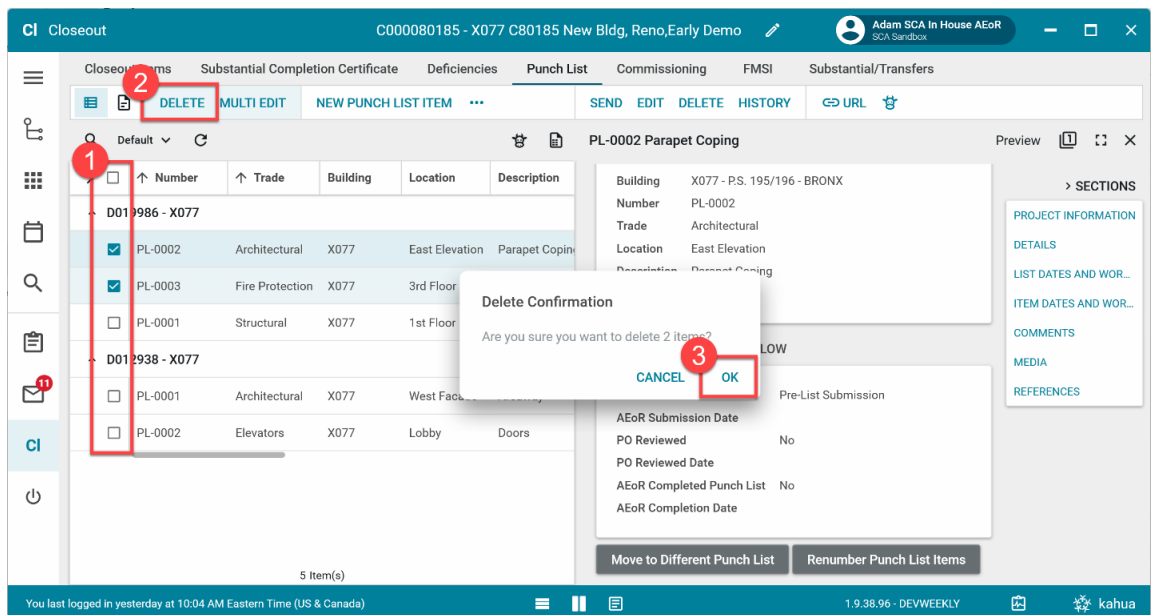
2. ***Delete Single Item:*** Select the item (**do not use** the checkboxes) > Click **Delete** > Click **Ok** to confirm.
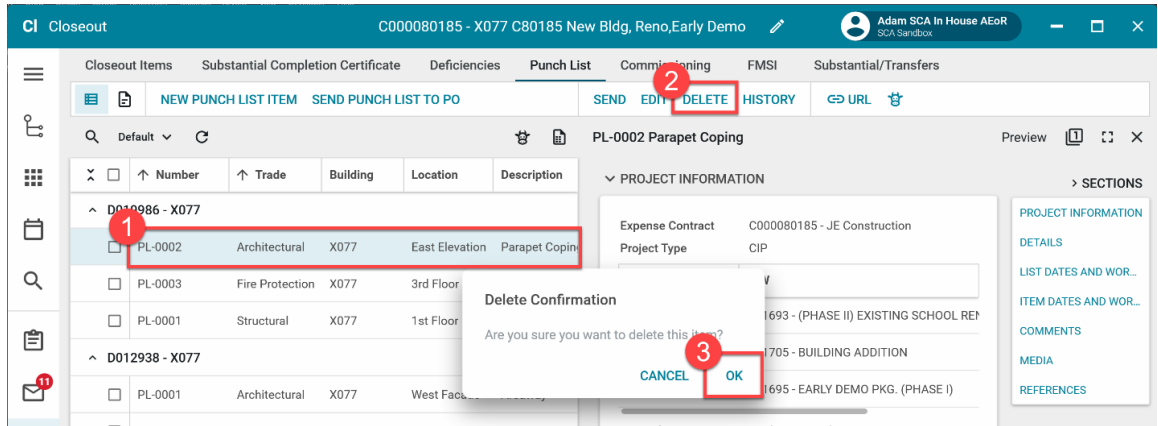
Renumber Punch List Items

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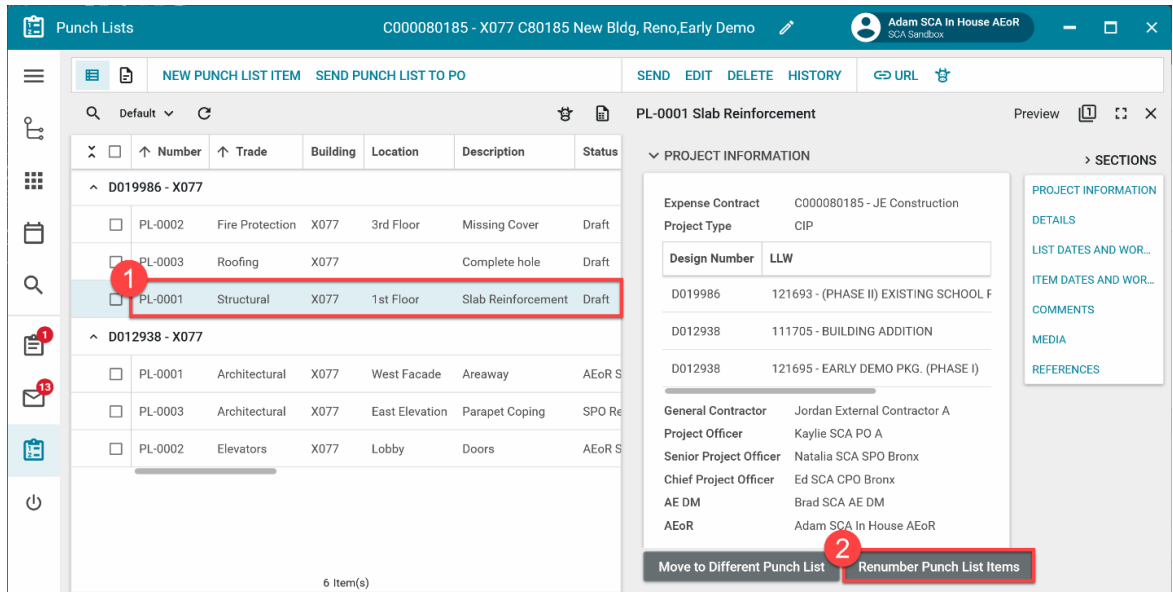
AEoR Submits Punch List

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.

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

Accepts or Disputes Punch List

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

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

Option 1: Click **SEND PUNCH LIST TO GC**

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

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

Enter **PO Comment** > Click **Continue**
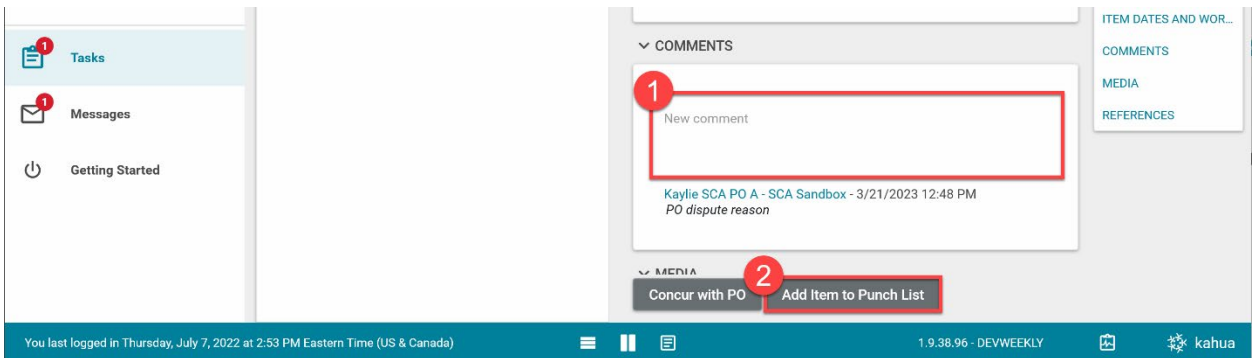
SPO Concurs or Adds Item to Punch List

1. Go to **Tasks** > Open task with subject **Review Returned Punch List Item**
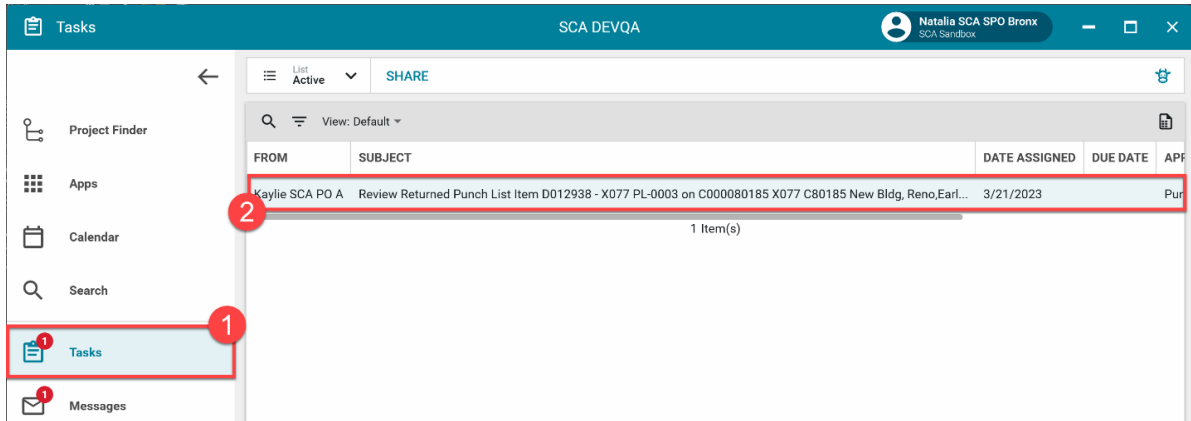
Option 1: Enter **Comments** > Click **Concur with PO**
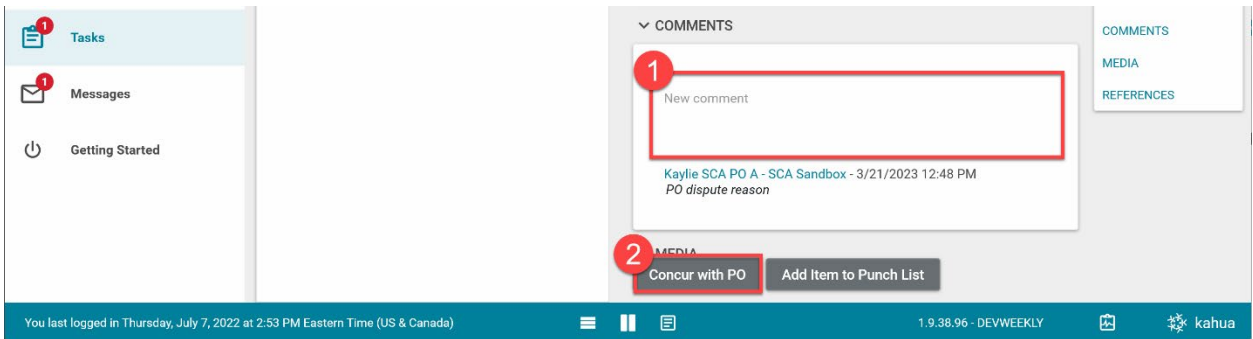
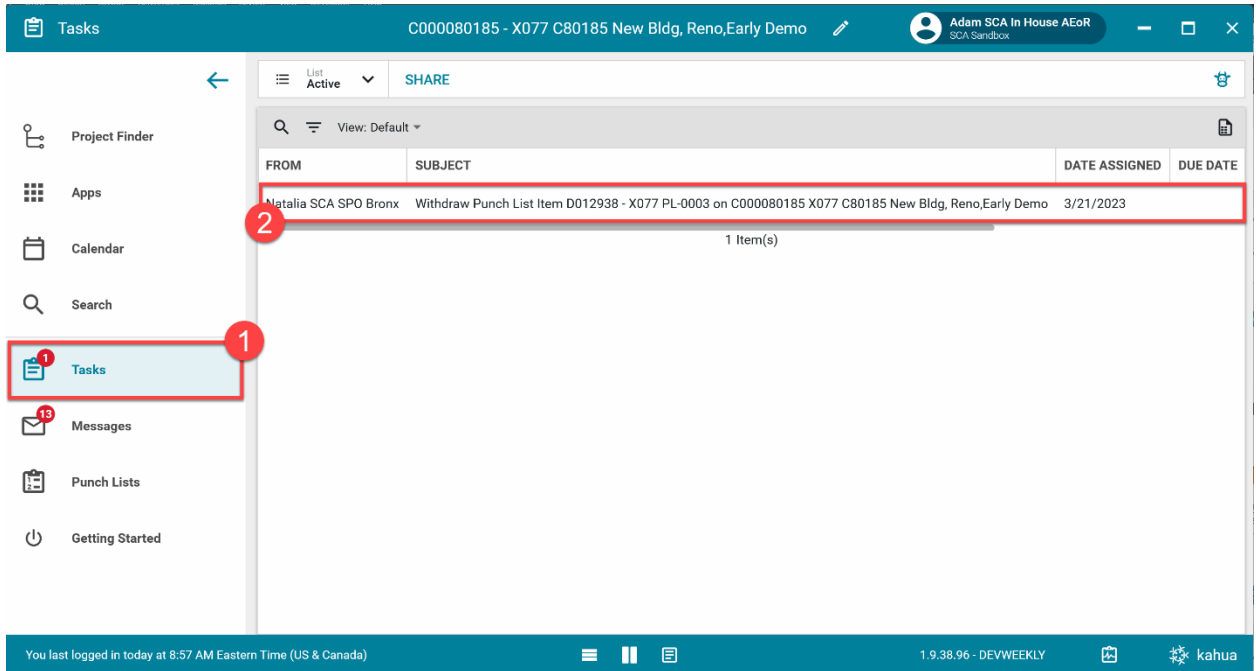**Option 2**: Enter **Comments** > **Add Item to Punch List**

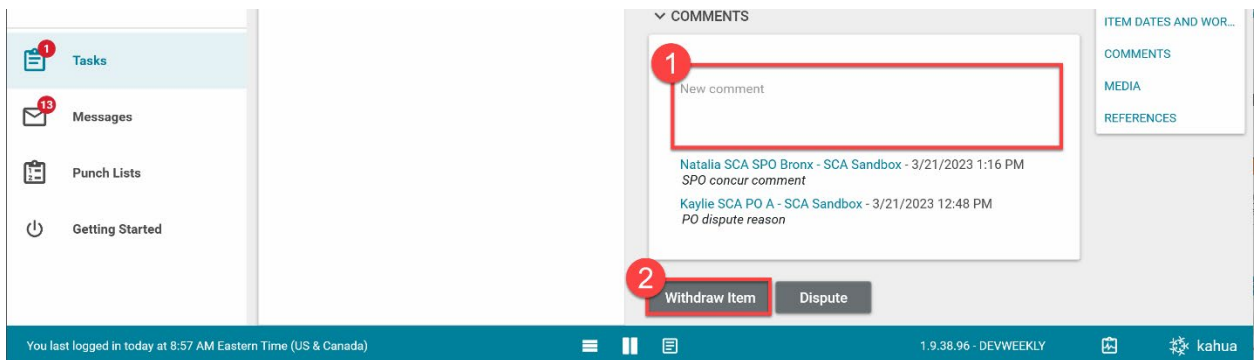A task is generated for the AEoR to Withdraw Disputed Punch List item.

AEoR Withdraws Item or Disputes Withdrawal
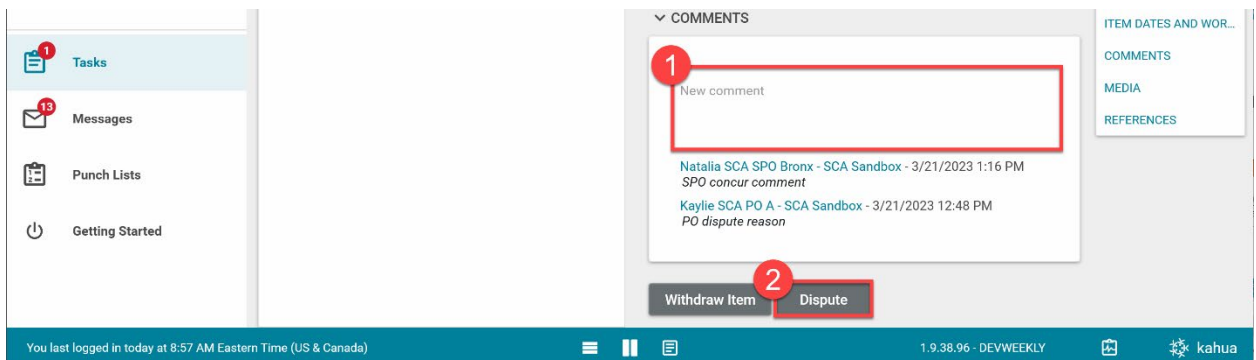SPO has concurred with the PO on the disputed punch list item.

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

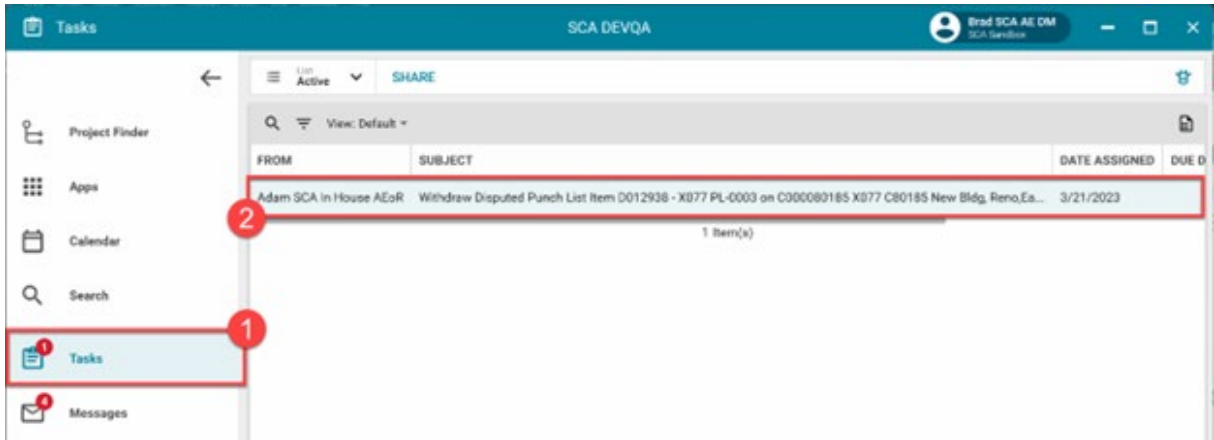**Option 1:** Enter **Comments** > Click **Withdraw Item**

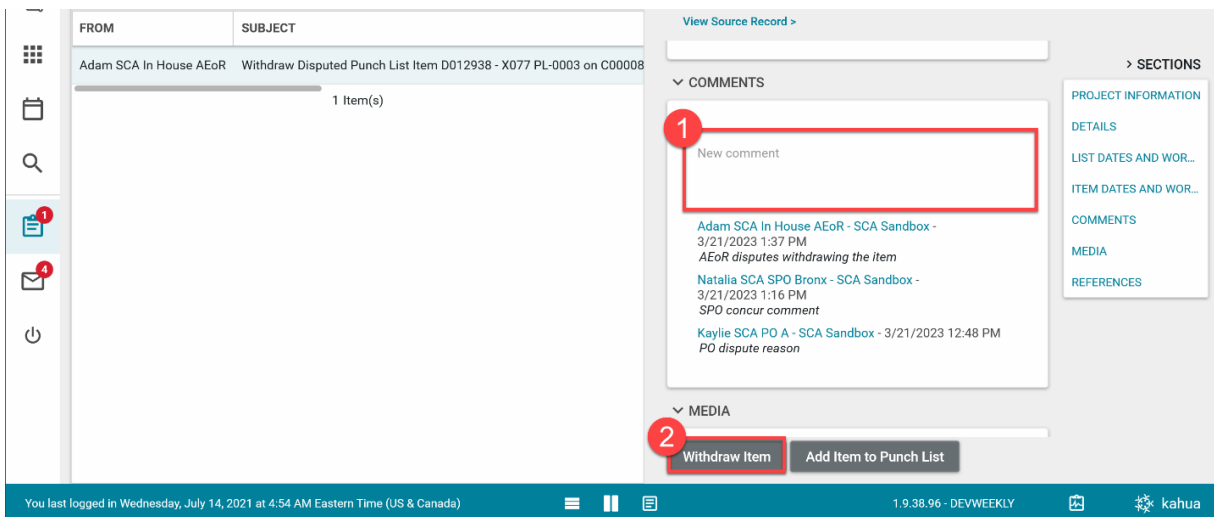**Option 2:** Enter **Comments** > Click **Dispute**

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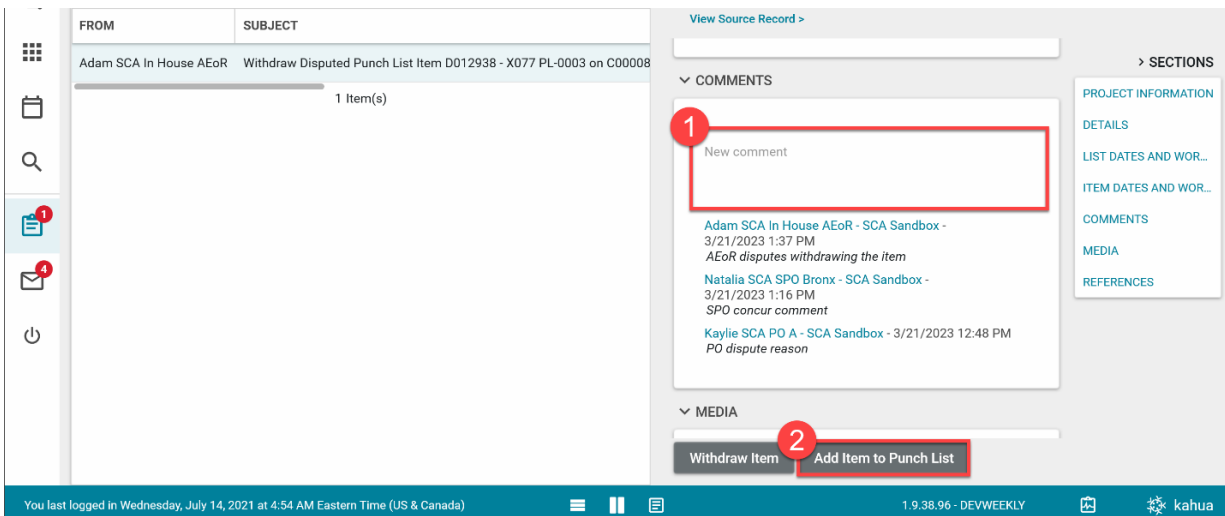
DPM/DM Withdraws Item or Adds Item to Punch List

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

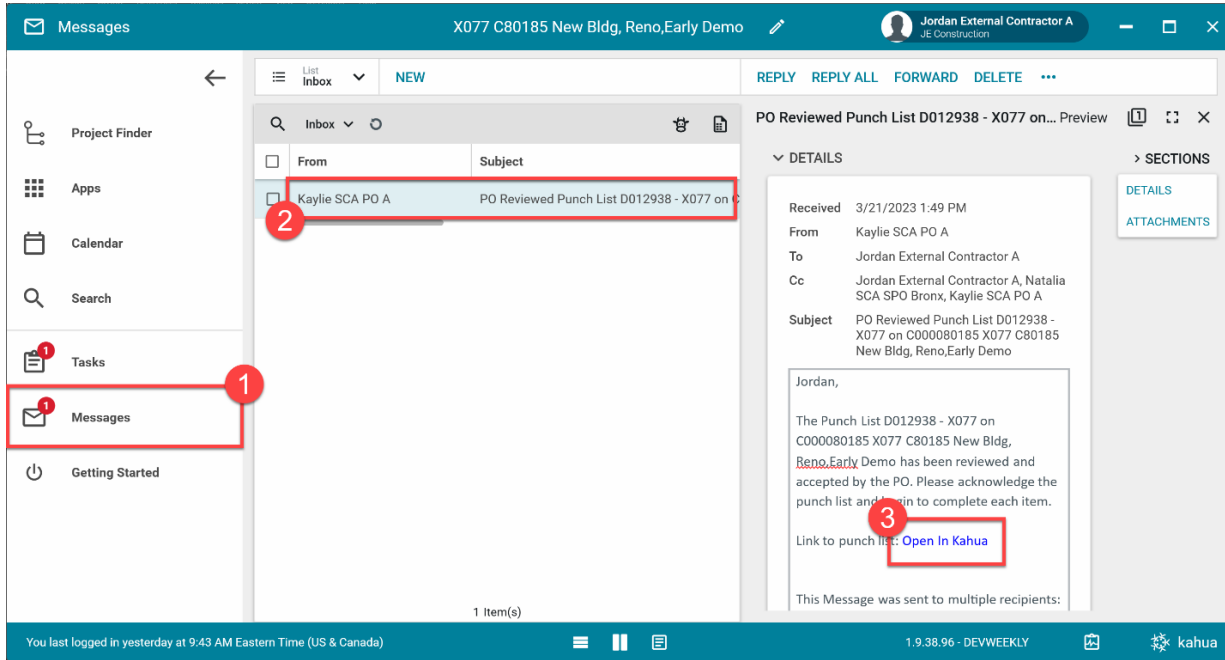**Option 1:** Enter **Comments** > Click **Withdraw Item**

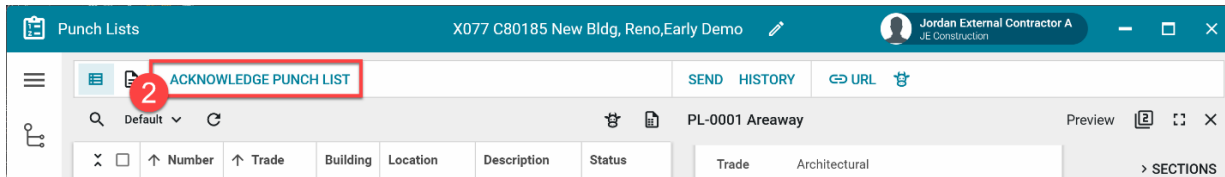**Option 2:** Enter **Comments** > **Add Item to Punch List**
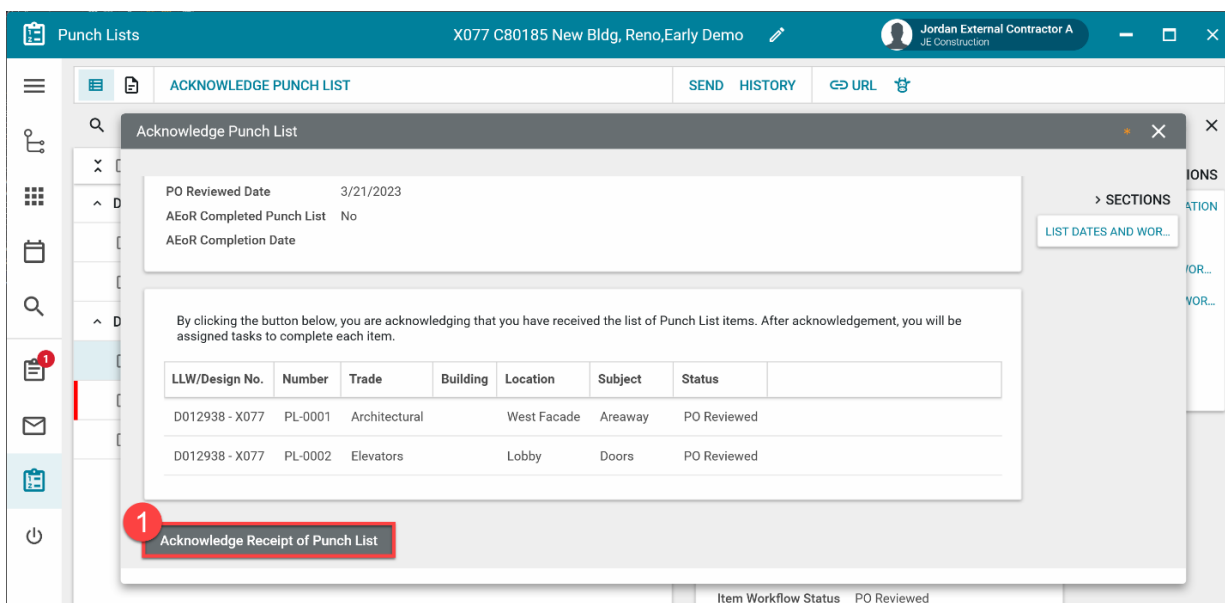
GC Acknowledges Punch List

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**

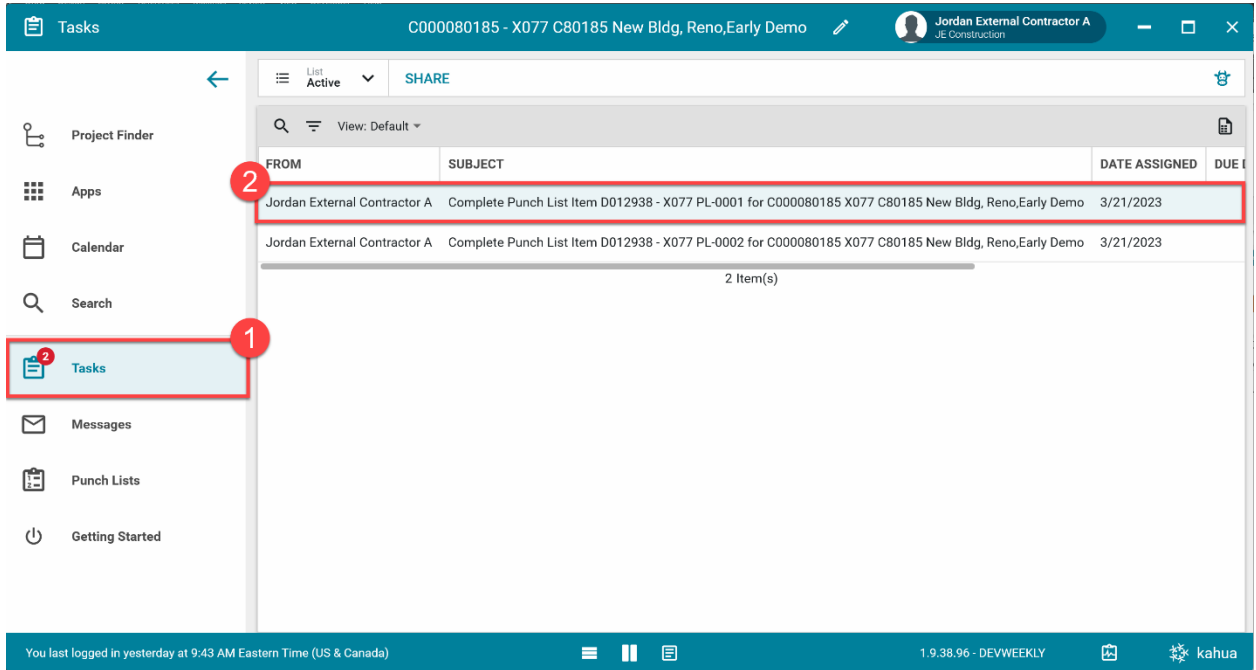3. Click **Acknowledge Receipt of Punch List**

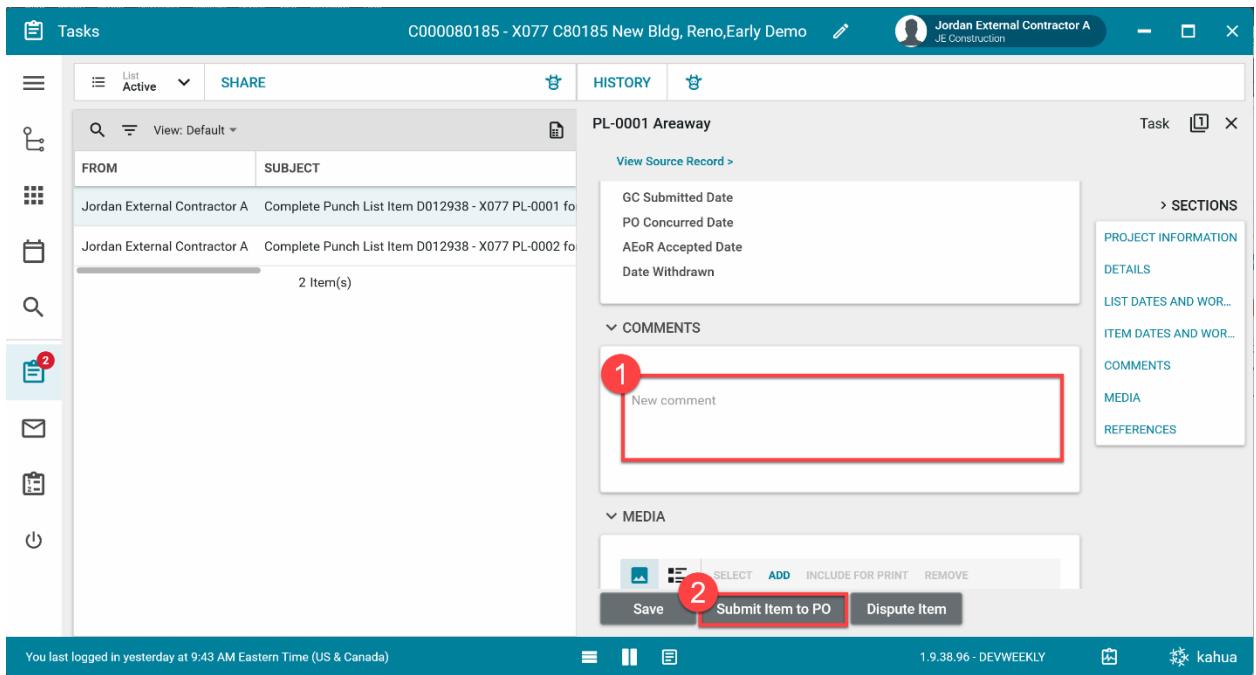The GC acknowledges the punch list and receives tasks to complete each item.

GC Completes Acknowledged Punch List Items

For GC who Acknowledged Punch List

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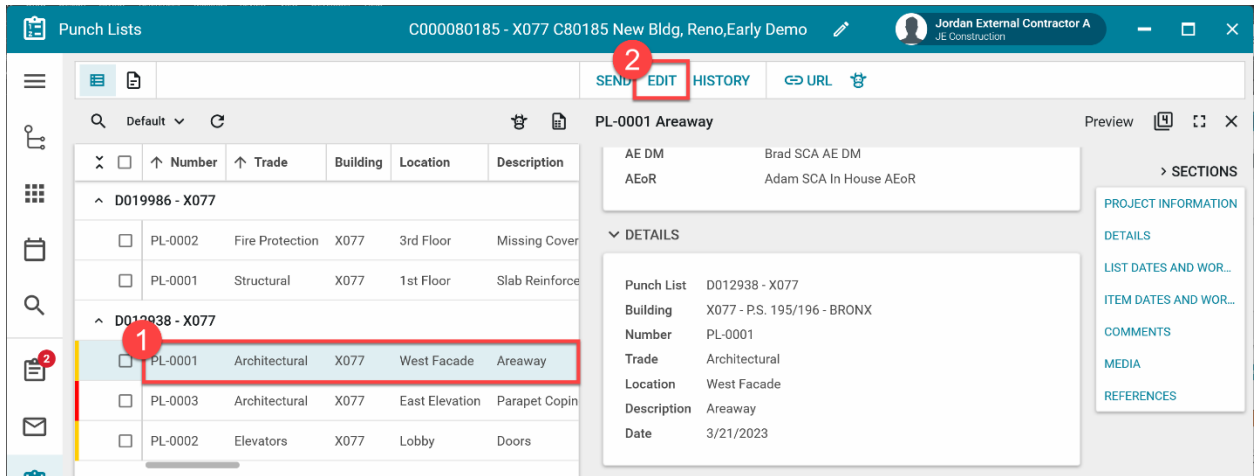2. Select the Complete Punch List Item task (or go to the item in the Punch List app)

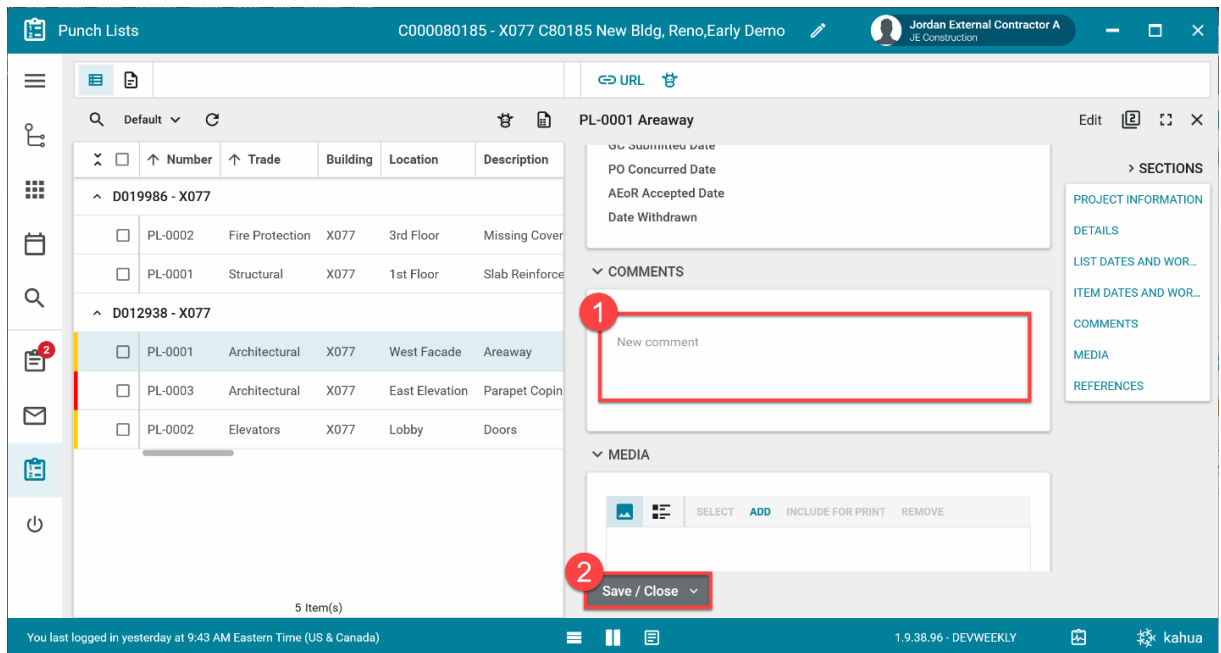3. Add a **Comment**
4. Click **Submit Item to PO**
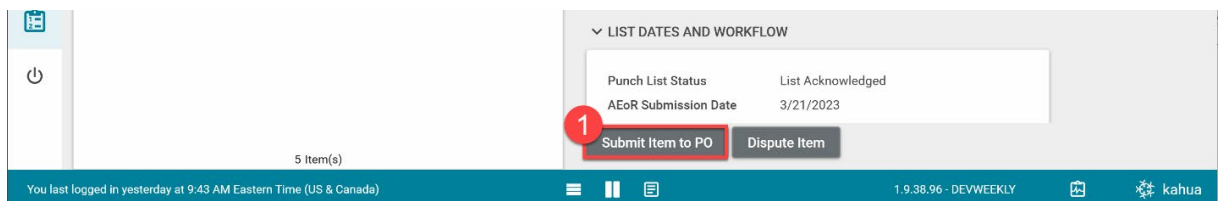
for Others

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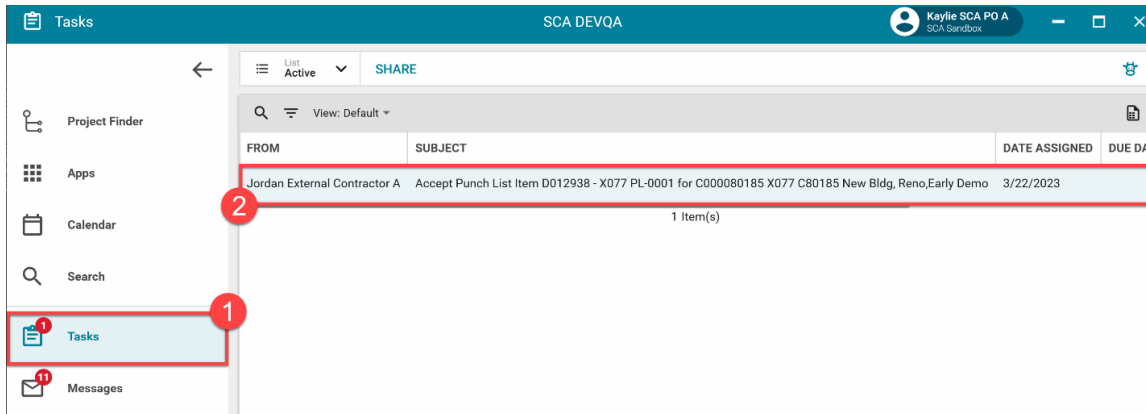

3. Add a **Comment**
4. Click **Save / Close**
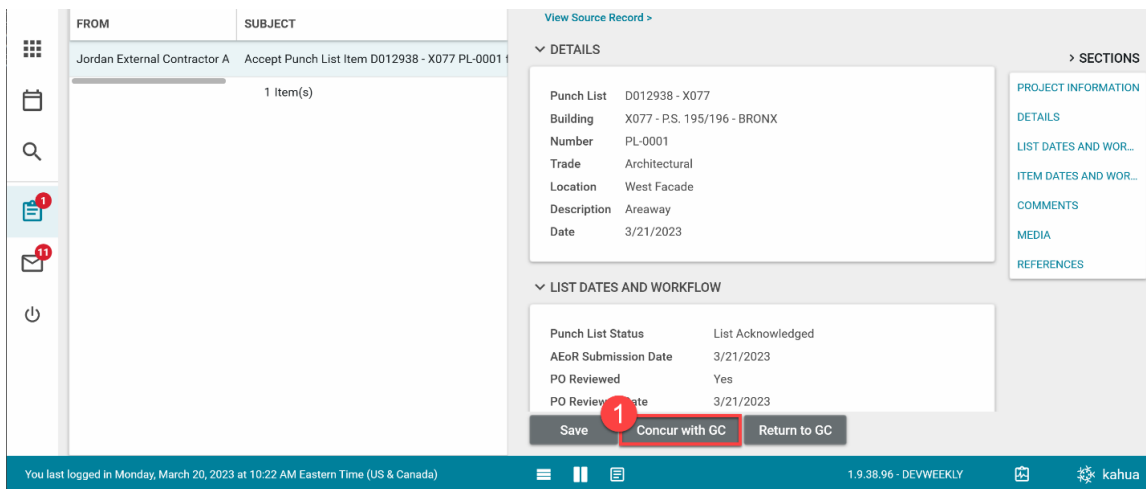

5. Click **Submit Item to PO**
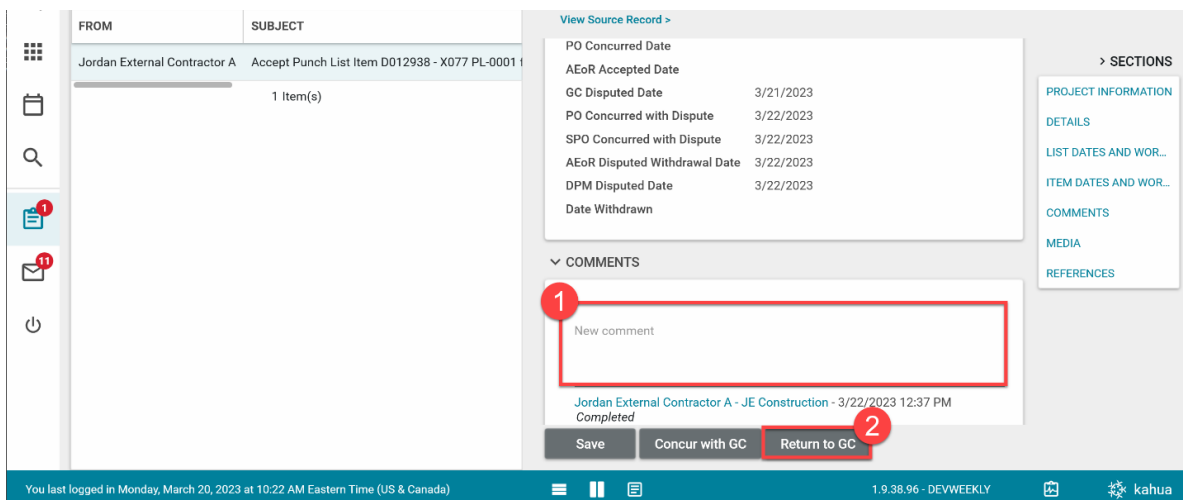
PO Concurs or Returns to GC

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

Option 1: Click **Concur with GC**

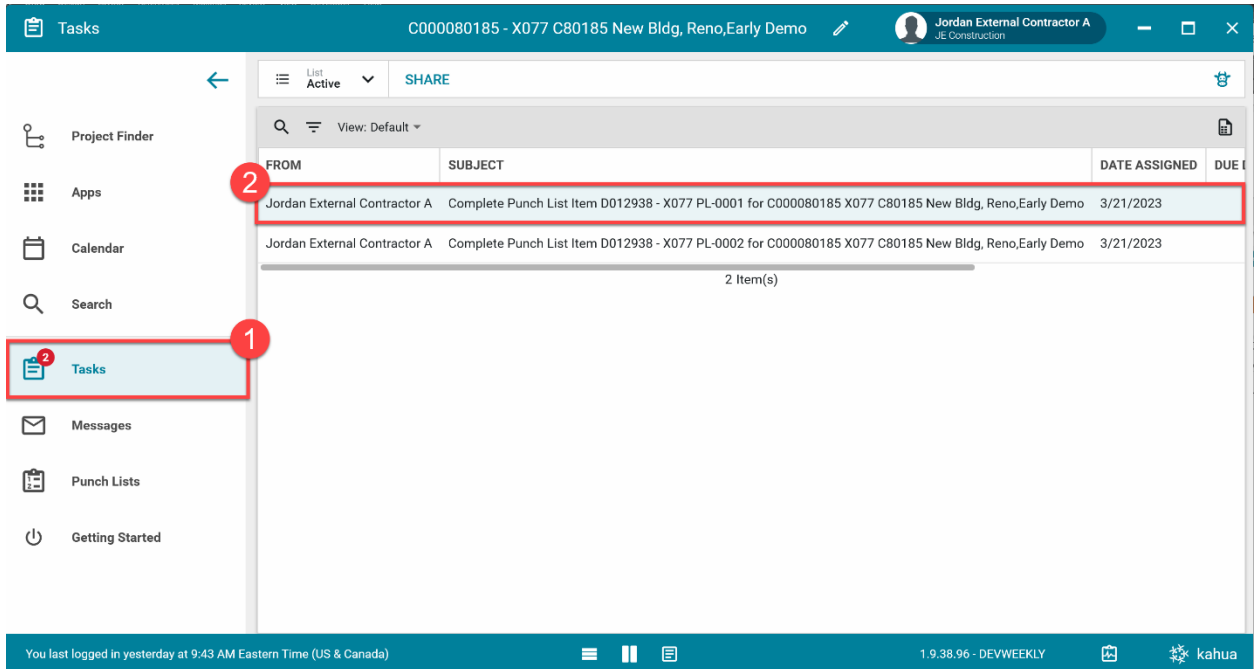**Option 2:** Enter **Comments**> Click **Return to GC.**

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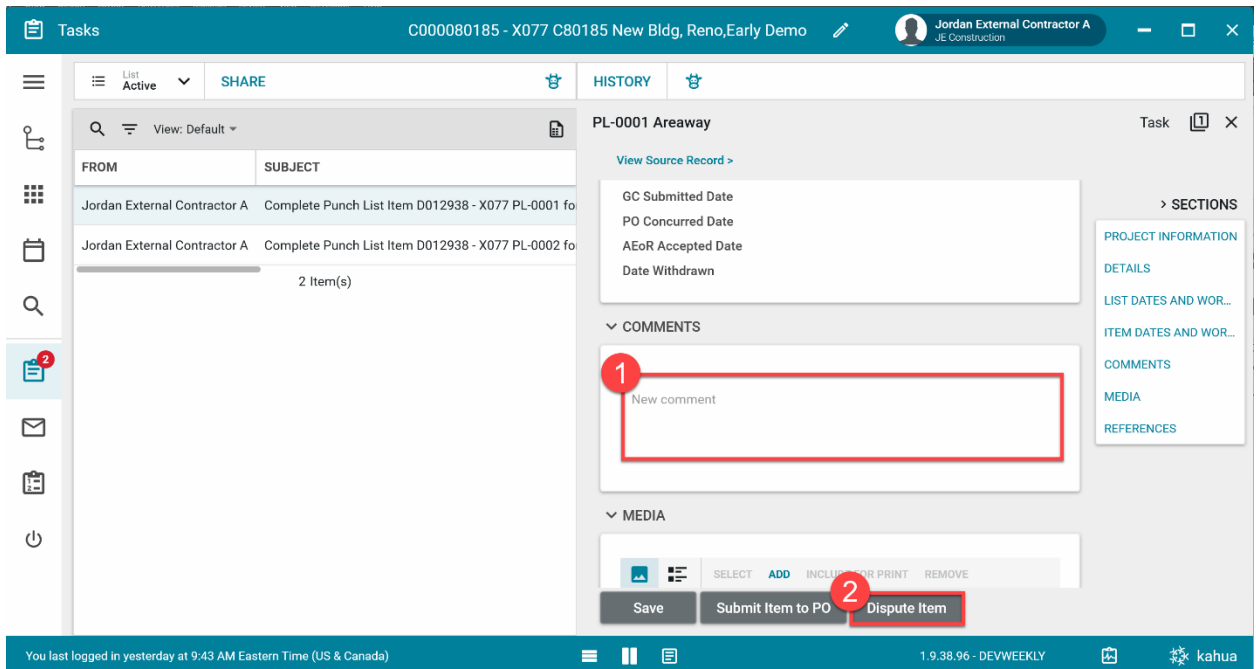
Dispute Acknowledged Punch List Items

GC Disputes Acknowledged Punch List Item

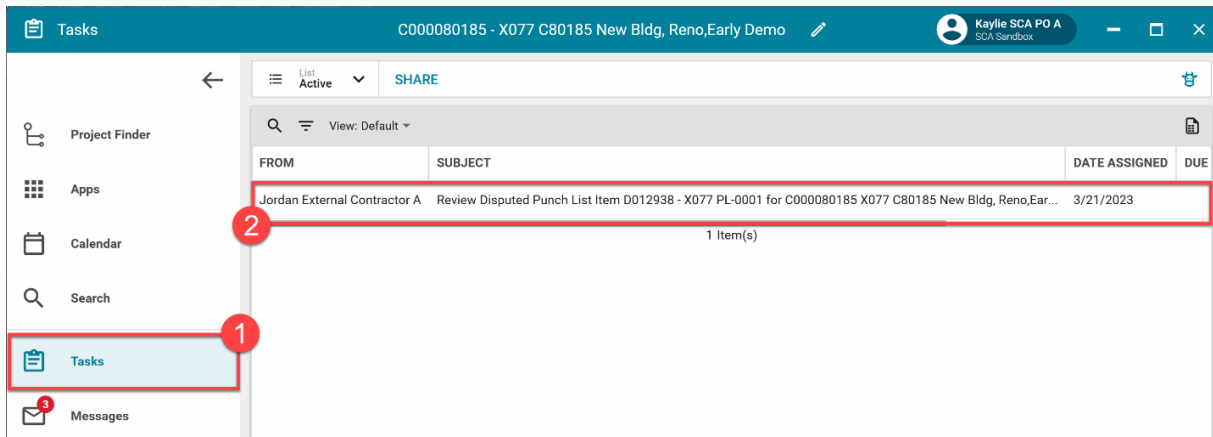1. Go to Tasks > Select the Complete Punch List Item task (you can also select the item in the Punch List app)

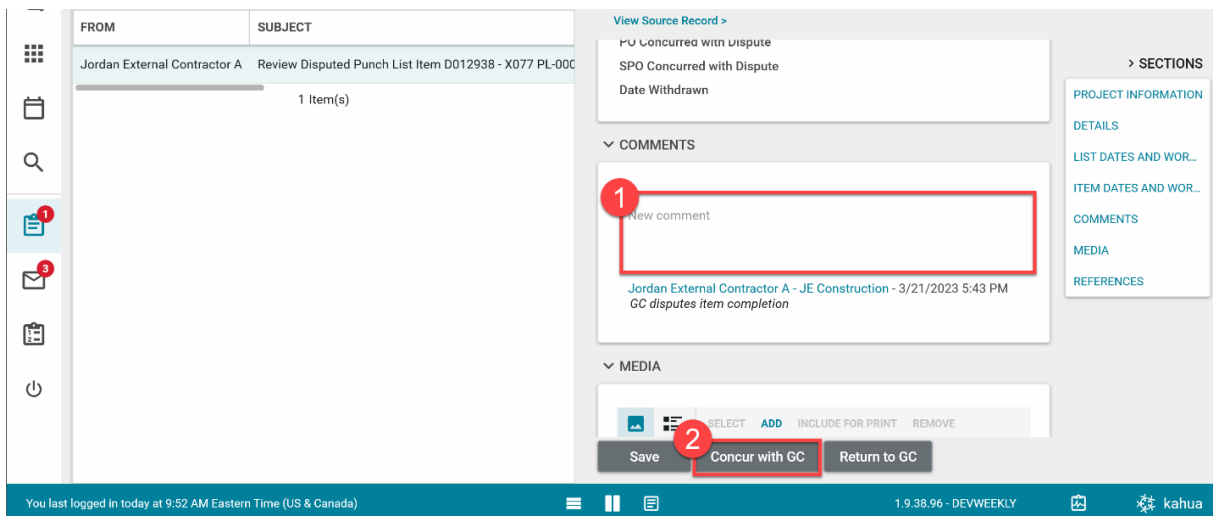2. Add a **Comment** > Click **Dispute Item**
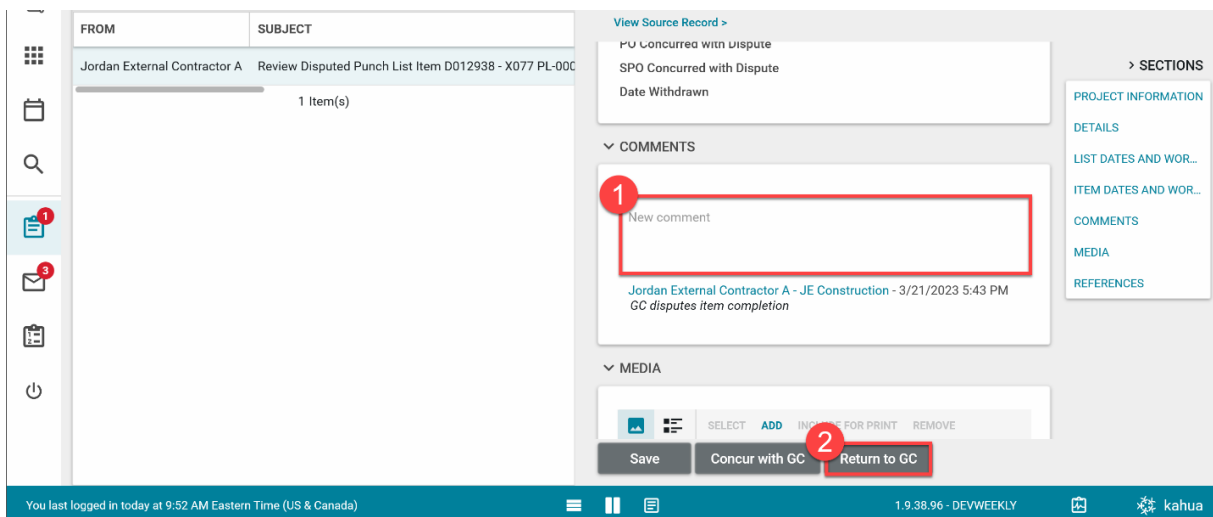
PO Concurs or Returns Disputed Item to GC

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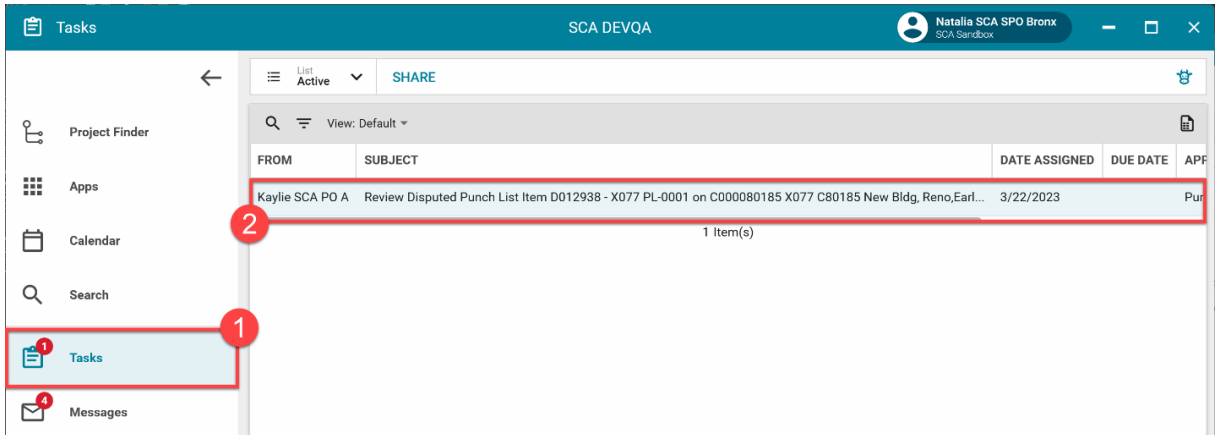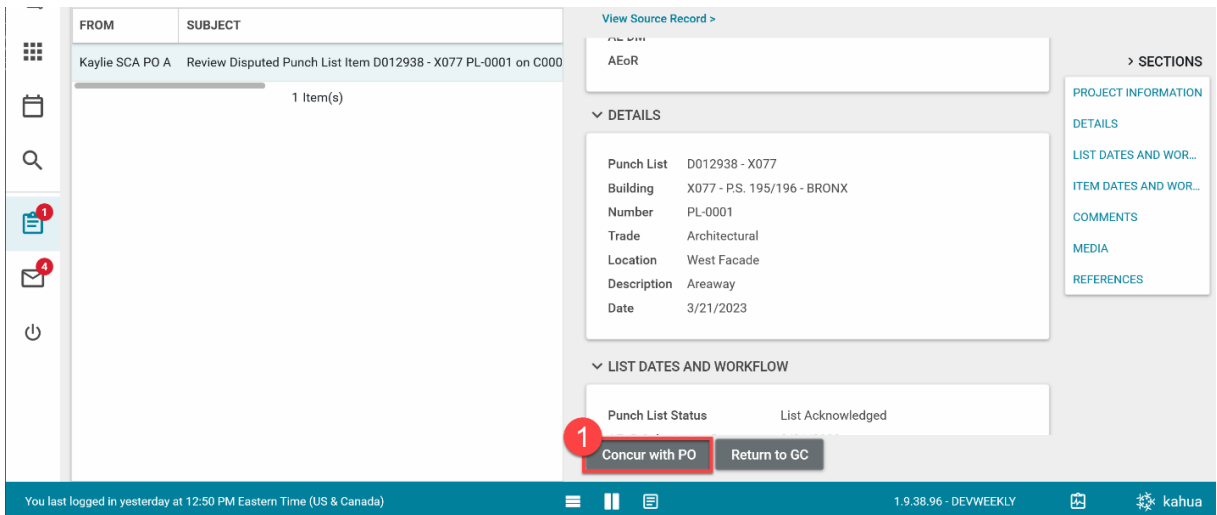

Option 1: Enter **Comments** > Click **Concur with GC**

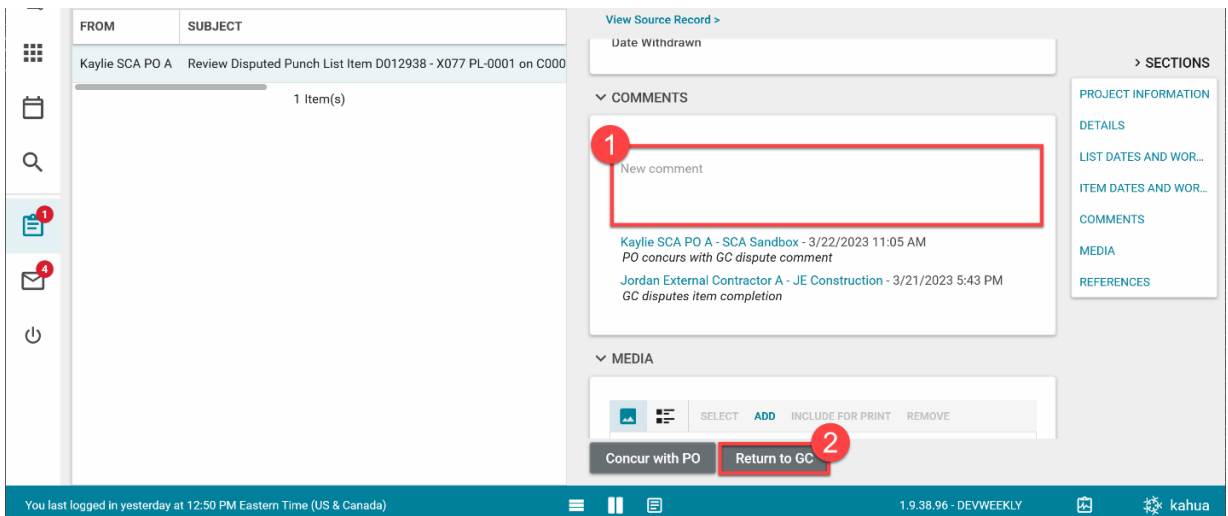**Option 2:** Enter **Comments** > Click **Return to GC**

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

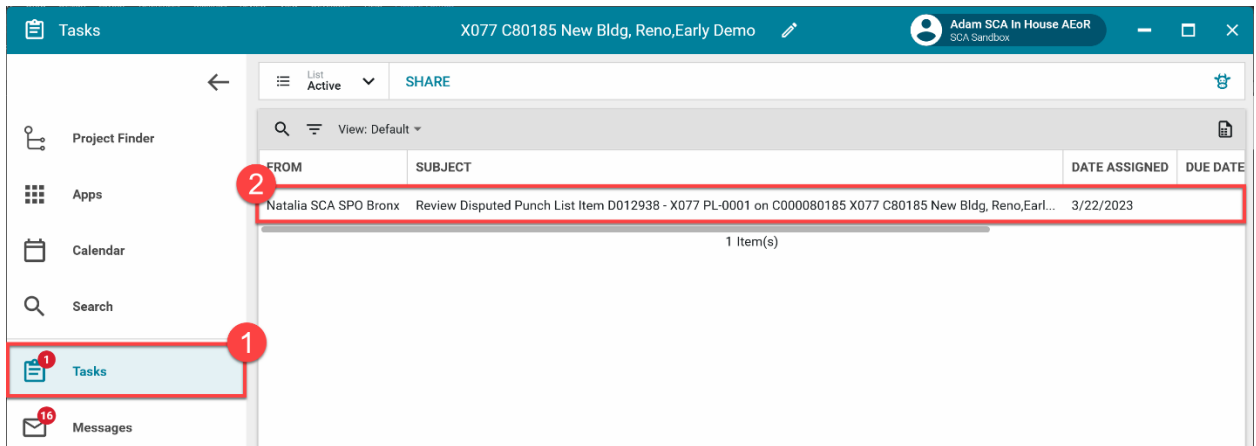

Option 1: Enter **Comment**s> Click **Concur with PO**

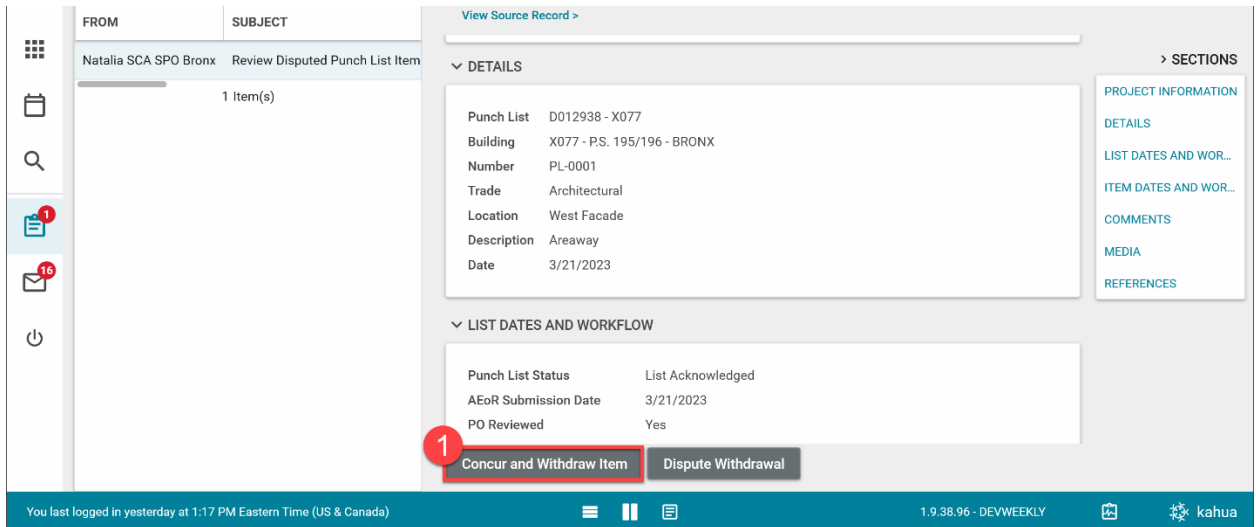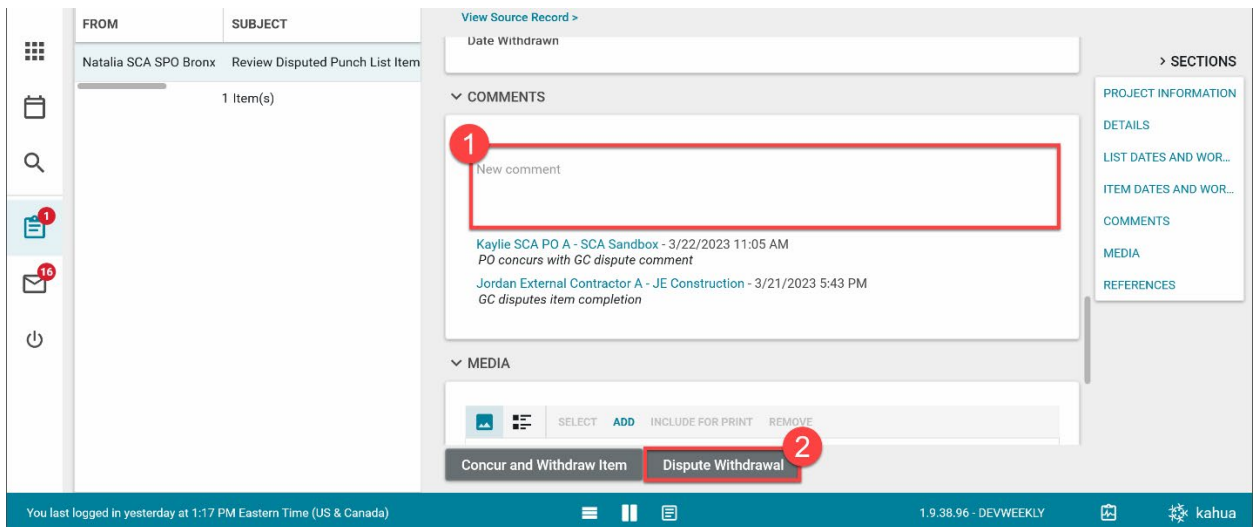Option 2: Enter **Comments**> Click **Return to GC**

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

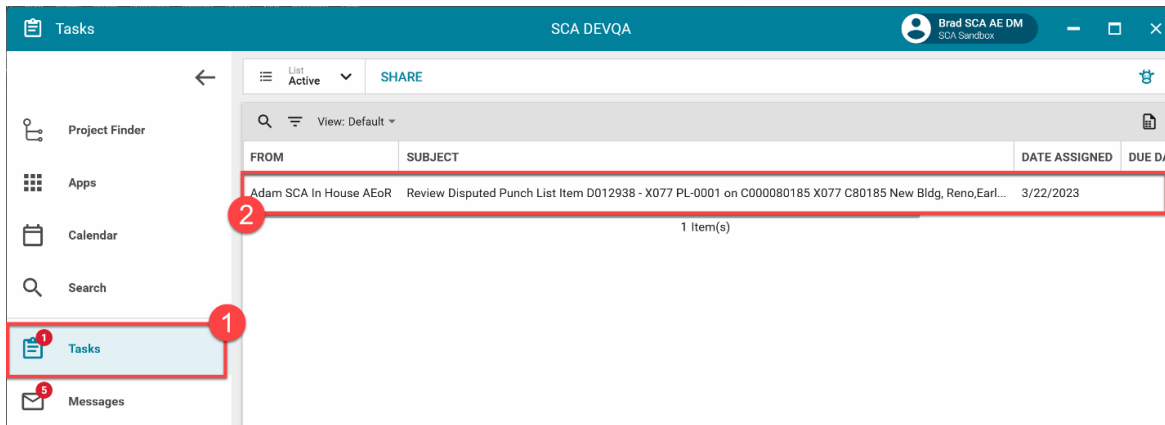**Option 1:** Click **Concur and Withdraw Item**

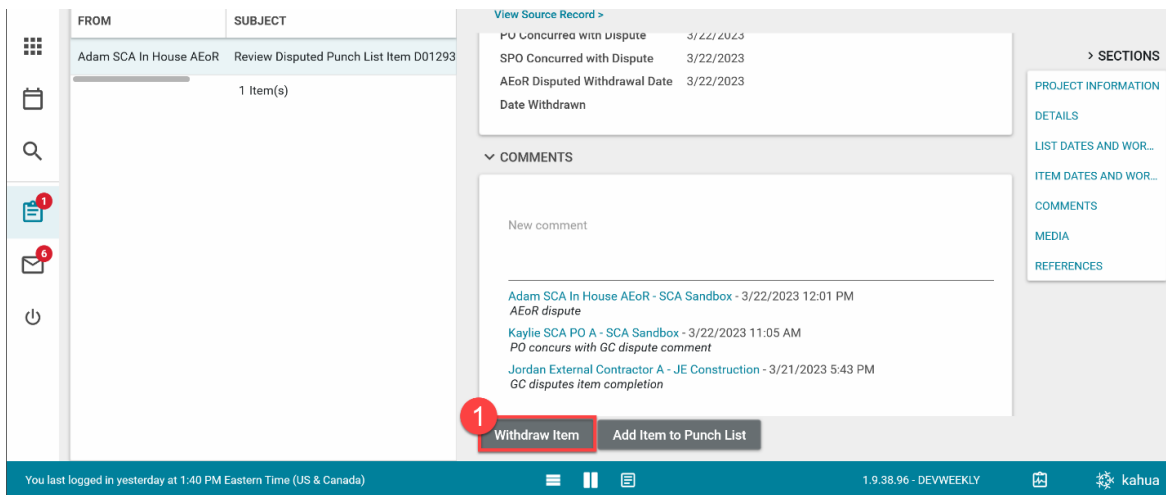**Option 2:** Enter **Comments**> Click **Dispute Withdrawal**
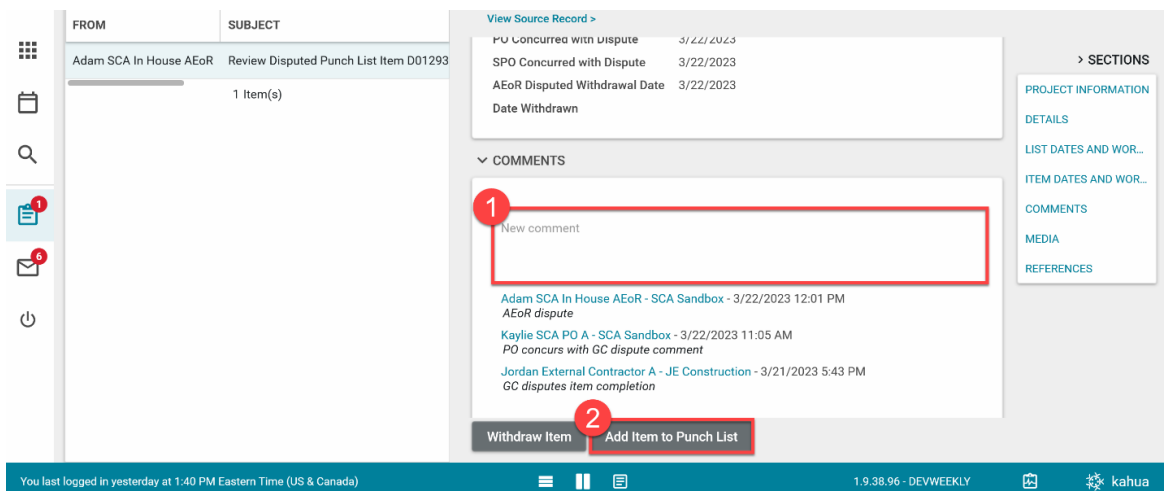
DPM/DM Withdraws or Adds Item to Punch List

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

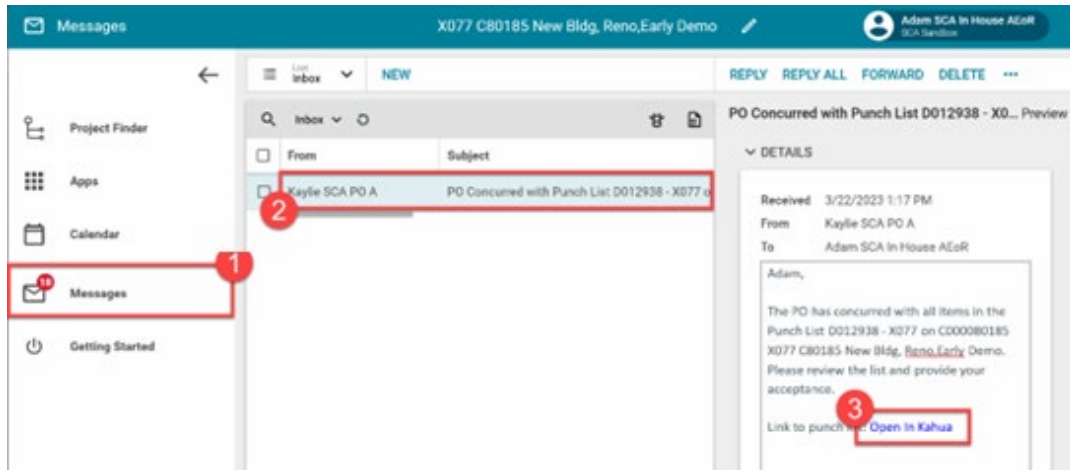**Option 1:** Enter **Comments**> Click **Withdraw Item**

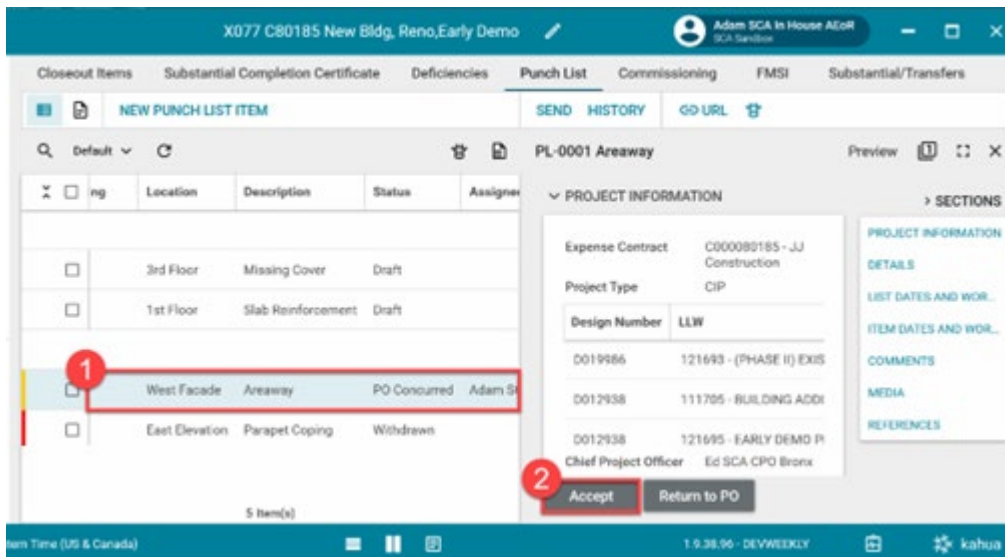**Option 2:** Enter **Comments**> Click **Add Item to Punch List**
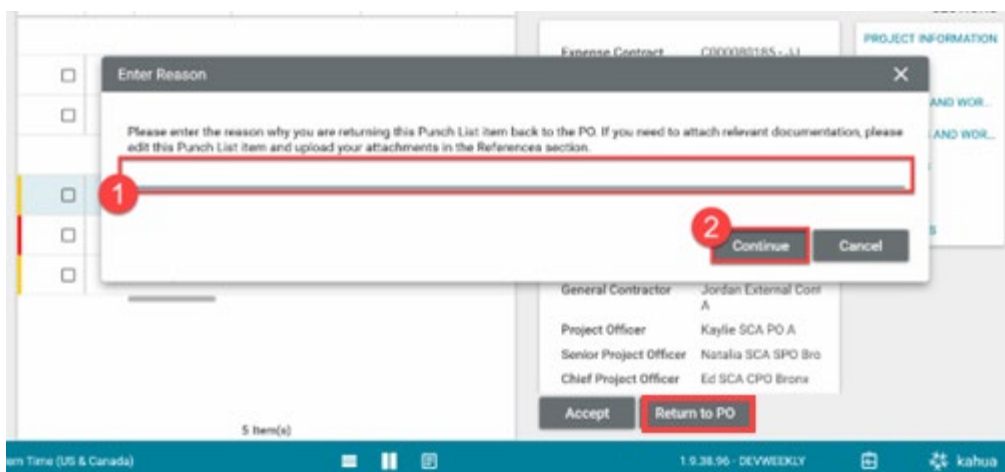
AEoR Accepts or Returns Completed Item

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

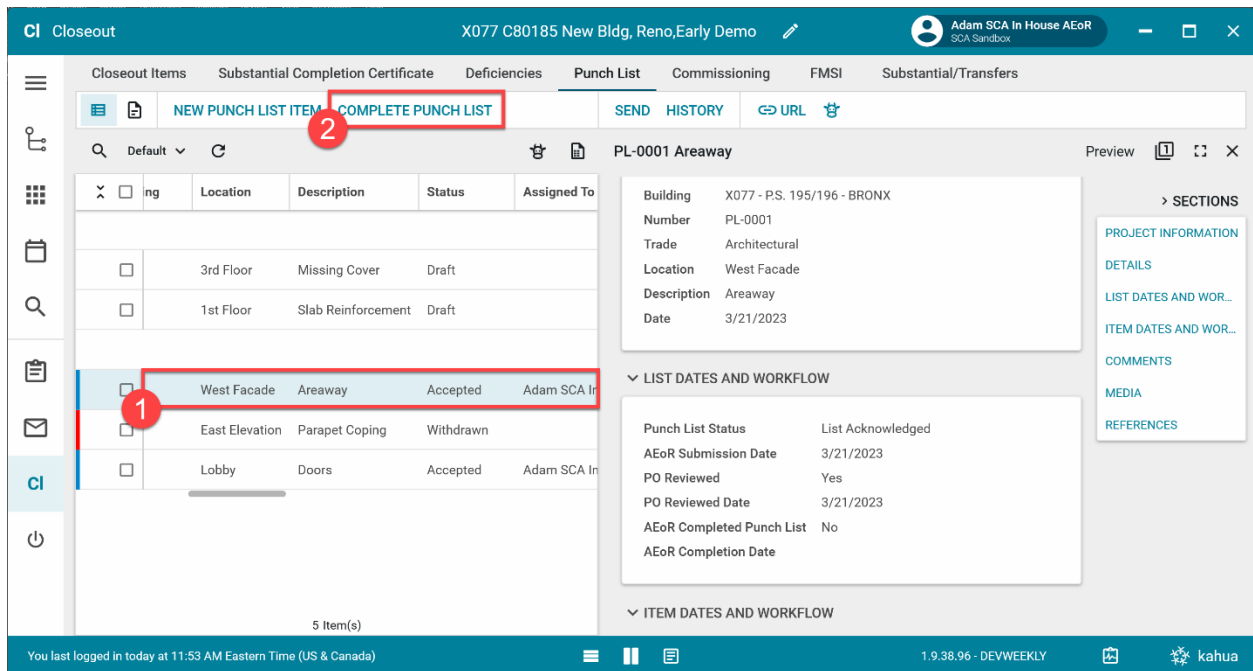**Option 1:** Select item with the status **PO Concurred** > Click **Accept**

Option 2: Click **Return to PO>** Enter a **Reason>** Click **Continue**
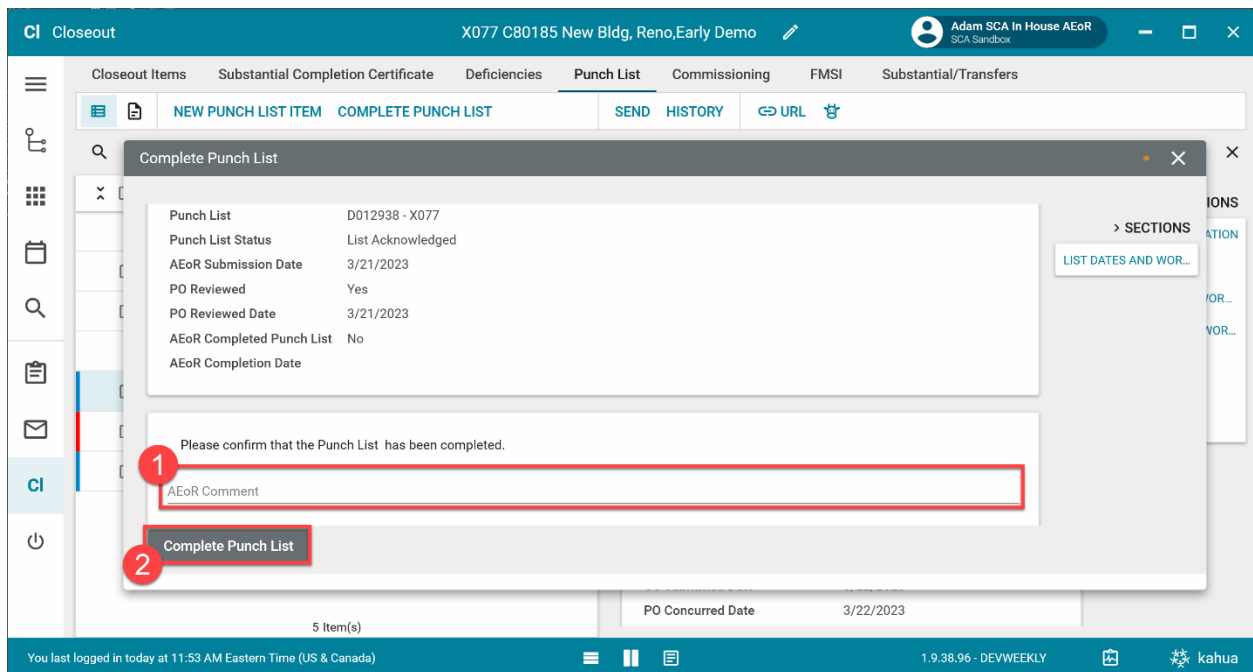
AEoR Completes Punch List

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.