

Project Number

Project Name

Project Manager

Contractor

**AGENCY/INSTITUTION NAME:**

**PROJECT CLOSE OUT CHECKLIST FOR PROJECTS UNDER \$150,000**

Provide information and documentation listed below:

Required for Full Close-out	Documentation in Folder	Date	Remark
<b>A/E (Prime Responsible Party) - if applicable</b>			
<input type="checkbox"/>	Asbestos Letter - Non specification (if applicable)		
<b>Contractor (Prime Responsible Party)</b>			
<input type="checkbox"/>	Asbestos Letter - Non use		
<input type="checkbox"/>	Completed Building Inspection Record - if Permit required		
<input type="checkbox"/>	Fire Alarm & Detecion Record Documents, Graphics map (pdf & CAD), and Fireworks Graphics		
<input type="checkbox"/>	Irrigation Record Documents		
<input type="checkbox"/>	CO - if Permit required		
<b>Documents Compiled for Internal and State Buildings Reporting (PM - Prime Responsibility)</b>			
<input type="checkbox"/>	Notice of Code Compliance include any code variances or email from Code Authority that no code inspections required		Copies from Orig Submittal
<input type="checkbox"/>	Building Permit		Copies from Orig Submittal
<b>APPROVALS AND SIGNATURES</b>		<b>Date</b>	<b>Initials</b>
Project Manager	File complete for submittal indicated above		
State Buildings Delegate	File verified for completeness and appropriate forms signed		
Project Coordinator	File reviewed for completeness for Internal and State Buildings Reporting documents Notification as required (GC/PM) If noted in Bid or Documented Quote - can be advertised electronically		
Finance/Accting	Notified that Project is Closed		

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**PROJECT CLOSE OUT CHECKLIST FOR PROJECTS OVER \$150,000**

Check box below appropriate for submittal intent and provide appropriate documentation in folder:

- Partial Final Acceptance and Partial Contractor's Settlement (Review w/State Bldgs & Finance before proceeding)
- Final Close-Out - Final Acceptance and Final Contractor's Settlement

Required for Partial or Full Close-out	Documentation in Folder	Date	Remark
<b>A/E (Prime Responsible Party)</b>			
<input type="checkbox"/>	<i>if applicable - Notice of Partial Substantial Completion (SBP-071)</i>		
<input type="checkbox"/>	<b>Notice of Substantial Completion (SBP-07)</b>		
<input type="checkbox"/>	<i>if applicable - Notice of Approval Occupancy/Use - Partial (SBP-01)</i>		
<input type="checkbox"/>	<b>Notice of Approval of Occupancy/Use - Total (SBP-01)</b>		
<input type="checkbox"/>	<b>Pre-Acceptance Checklist (SBP-05)</b>		
<input type="checkbox"/>	Completion/Close-Out Letter of Concurrence		
<input type="checkbox"/>	Asbestos Letter - Non specification		
<b>Contractor (Prime Responsible Party)</b>			
<input type="checkbox"/>	Completion/Close-Out Request Letter		
<input type="checkbox"/>	Asbestos Letter - Non use		
<input type="checkbox"/>	Completed Building Inspection Record (SBP-BIR)		
<input type="checkbox"/>	Fire Alarm & Detecion Record Documents, Graphics map (pdf & CAD), and Fireworks Graphics		
<input type="checkbox"/>	Irrigation Record Documents		
<input type="checkbox"/>	<i>if applicable - TCO</i>		
<input type="checkbox"/>	<i>if applicable - final letter from Materials Testing consultant</i>		
<input type="checkbox"/>	CO		
<b>Proj Mgr (Prime Responsible Party)</b>			
<input type="checkbox"/>	Notice of Occupancy and Use List / Project Acceptance List		
<input type="checkbox"/>	Complete Lessons Learned and Project Monitoring and Administrative letters		
<b>Documents Needed for Advertising Settlement</b>			
<input type="checkbox"/>	<i>if applicable - Notice of Partial Final Acceptance (SBP-6.271)</i>		
<input type="checkbox"/>	<b>Notice of Final Acceptance (SBP-6.27)</b>		
<input type="checkbox"/>	<i>if applicable - Notice of Partial Contractors Settlement (SBP-7.31)</i>		
<input type="checkbox"/>	<i>if applicable - Consent of Surety to Reduction in or Partial Release of Retainage (G707A)</i>		
<input type="checkbox"/>	<b>Notice of Contractors Settlement (SBP-7.3)</b>		
<input type="checkbox"/>	<b>Consent of Surety to Final Payment (G707)</b>		
<b>Documents Compiled for Internal and State Buildings Reporting (PM - Prime Responsibility)</b>			
<input type="checkbox"/>	Notice of Code Compliance include any code variances		Copies form Orig Submittal
<input type="checkbox"/>	Original BIR issued with permit or email from Code Authority that no code inspections required - <i>Exhibit L</i>		
<input type="checkbox"/>	Notice to Proceed (SBP-6.26) or Commence Construction Phase (SBP-7.26)		Copies form Orig Submittal
<input type="checkbox"/>	Building Permit		Copies form Orig Submittal
<input type="checkbox"/>	Complete Change Order Log (for Final SC4.1 report)		
<input type="checkbox"/>	Current Finance Spreadsheet from PRF log (for Final SC4.1 report)		

APPROVALS AND SIGNATURES		Date	Initials
Project Manager	File complete for submittal indicated above		
State Buildings Delegate	File verified for completeness and appropriate forms signed		
Principal Representative	Appropriate forms signs as needed (date Partial or Final Acceptance and Contractor's Settlement as required)		
Project Coordinator	File reviewed for completeness for Internal and State Buildings Reporting documents Advertisement and/or notification as required (GC/CM/PM) If noted in Bid advertisement - can be advertised electronically		

**FOLDER DISTRIBUTION**

ALL Original copies of Transition / Close-Out are retained by your organization

CLAIMS & FINAL PAYMENT	Date	Initials
<input type="checkbox"/> "No Claims" letter dated on or after "settlement date" is provided by Contractor to PM (If Retainage Held)		
Finance/Acting		Claims Reconciliation and Final Payment