

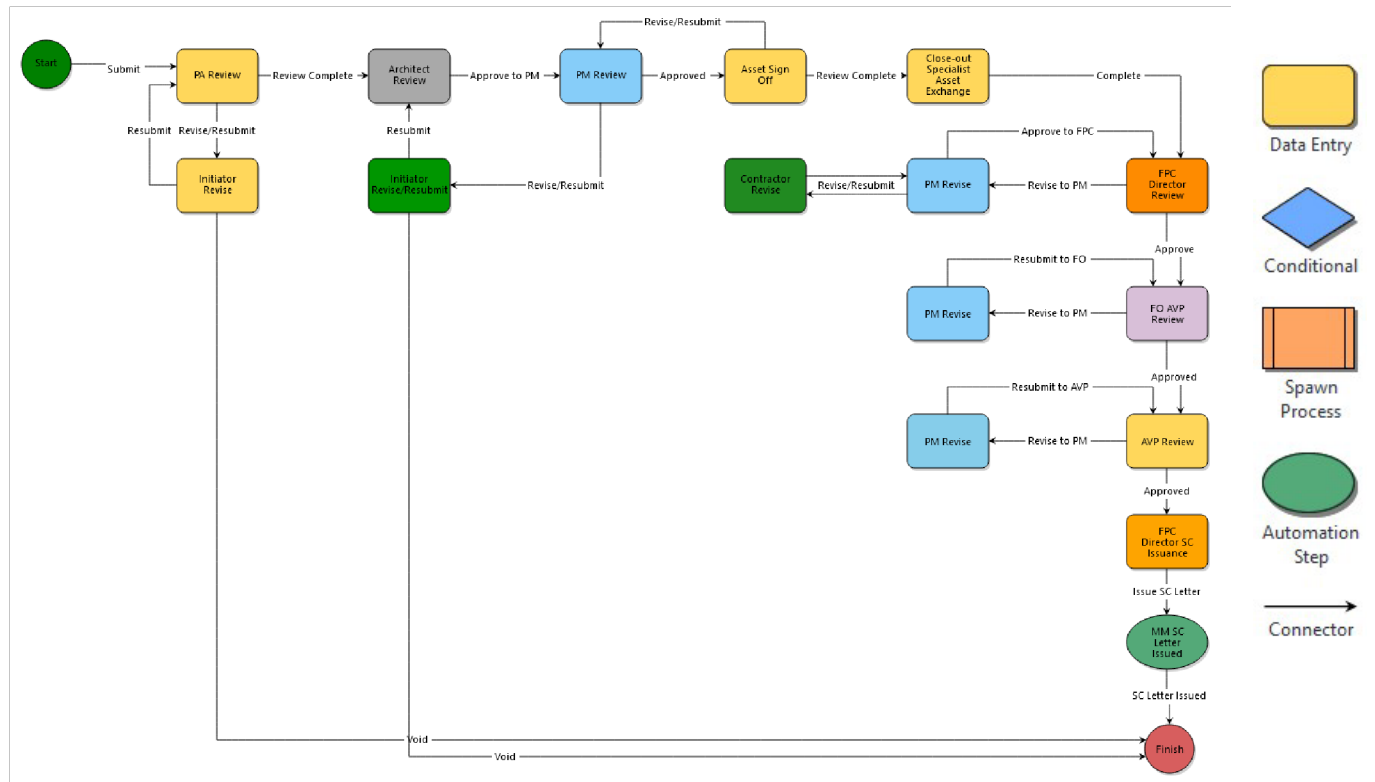
Completing The Substantial Completion Process

The Substantial Completion (SC) process captures specific information requires as part of UCF's policies and is an important prerequisite needed to complete the Final Close-out and Completion (FCCO) process on projects that require it. Most users in the FCCO workflow will only need to take action on the process once unless revisions are required. Each page layout in the FCCO process contains detailed instructions, but users should contact the eB Admins with any questions or concerns at eBuilderAdmin@ucf.edu.

The FCCO process requires actions from the following eB roles. Each step is expected to be completed in the listed timeframe.

- Contractor (submittal to be completed less than 14 business days after the date of A/E Certificate of Substantial Completion)
- Project Administrator (1 business day)
- Architect/Engineer (A/E) (less than 3 business days)
- Planning, Design & Construction (PDC) Project Manager (less than 2 business days)
- Asset Management Coordinator (less than 3 business days)
- Project Close-out Specialist (1 business day)
- PDC Director (less than 3 business days)
- FO AVP (less than 3 business days)

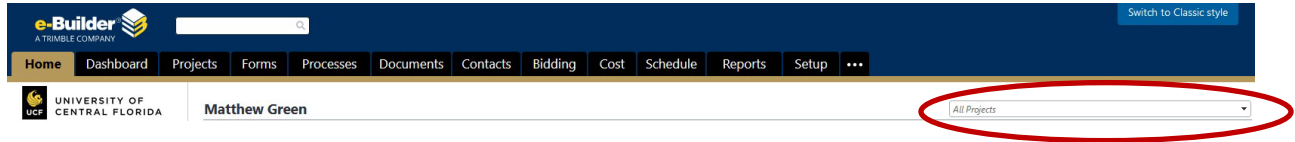
The SC workflow moves from person to person, collecting information and filing it in the appropriate eB project folder automatically. Users can send the process back to the contractor or other relevant user for corrections if necessary. The full SC workflow is shown on page 2 and will be explained further in this document.



Starting The Process

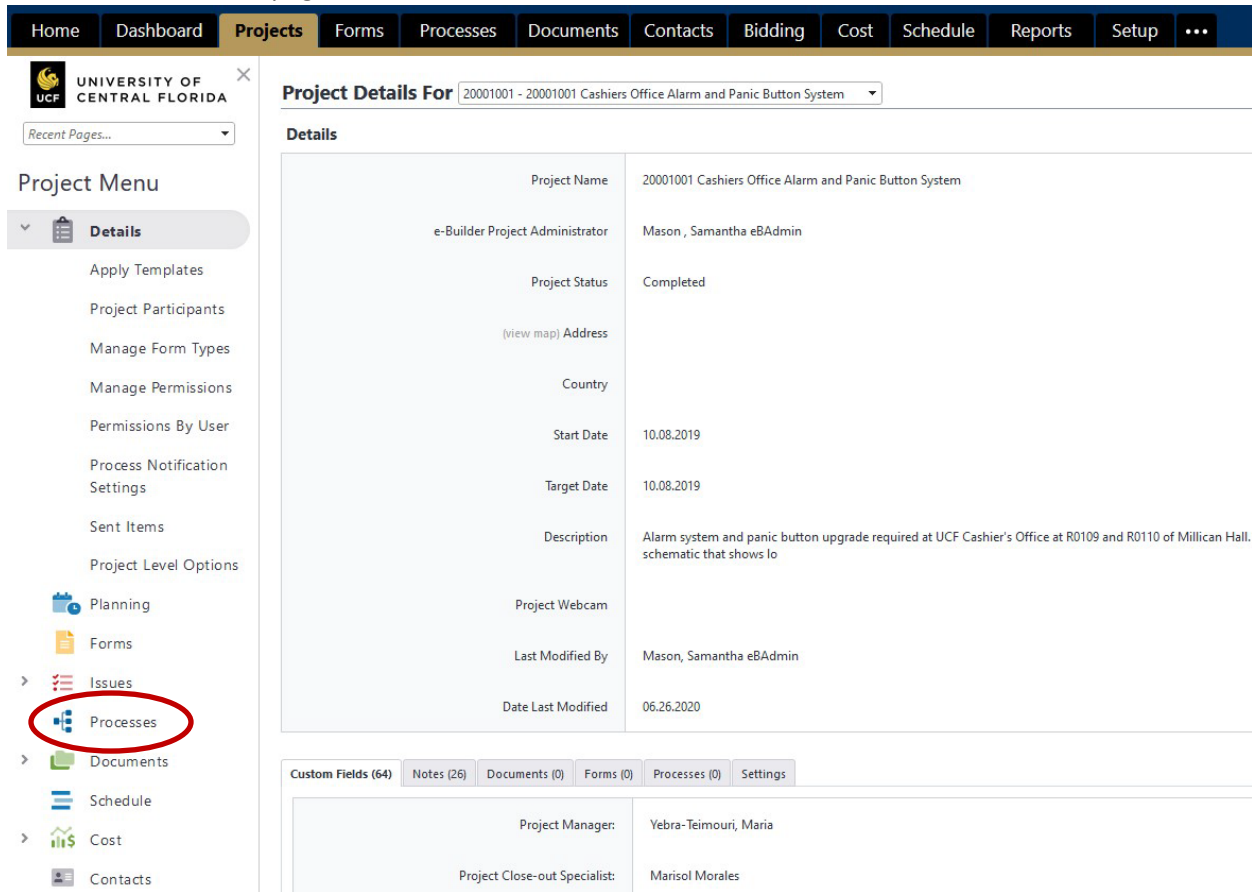
The Substantial Completion process is initiated from the Processes page of the project.

- 1) Search for the project by typing the UCF project number into the search box on the e-Builder home page. Click on the project when it appears in the box to go to the Project Details page.



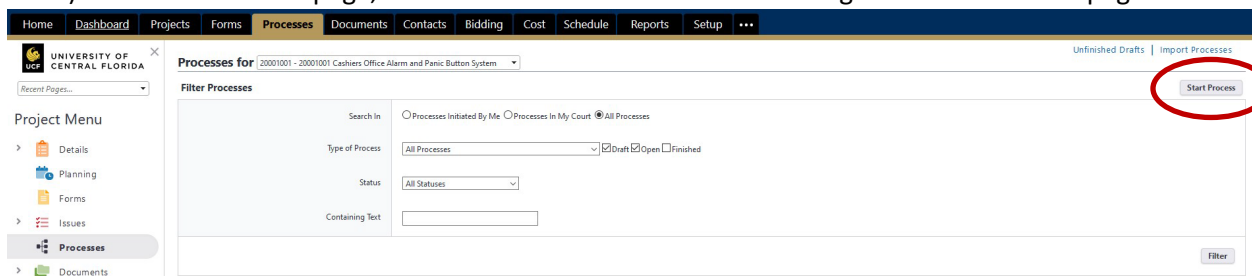
The screenshot shows the e-Builder home page. At the top, there is a navigation bar with links: Home, Dashboard, Projects, Forms, Processes, Documents, Contacts, Bidding, Cost, Schedule, Reports, Setup, and a menu icon. Below this is a user profile section for 'Matthew Green' with a dropdown menu labeled 'All Projects' which is circled in red.

- 2) On the Project Details page, click on the Processes link on the left-hand sidebar menu to go to the Processes page.



The screenshot shows the 'Project Details' page for '20001001 - 20001001 Cashiers Office Alarm and Panic Button System'. The left-hand sidebar menu is visible, with the 'Processes' link circled in red. The main content area shows project details such as Project Name, e-Builder Project Administrator, Project Status, Address, Country, Start Date, Target Date, Description, Project Webcam, Last Modified By, and Date Last Modified. Below this, there are tabs for Custom Fields, Notes, Documents, Forms, Processes, and Settings.

- 3) On the Processes page, click the Start Process button on the right-hand side of the page.



The screenshot shows the 'Processes' page for '20001001 - 20001001 Cashiers Office Alarm and Panic Button System'. The left-hand sidebar menu is visible, with the 'Processes' link circled in red. The main content area shows a search bar, a dropdown for 'Type of Process', a dropdown for 'Status', and a text input for 'Containing Text'. On the right-hand side, there is a 'Start Process' button circled in red.

- 4) On the Start Process page, scroll down to and click on 09 – Substantial Completion (SC). The Start page for the process will appear.

Processes

Cancel

Process Name	Description
02 - Project Charter Process (PCP)	This process is for reviewing/approving project requests, identifying configurations in e-Builder, assigning participants (staffing), identify milestones, entering and approving the initial budget (ROM), etc.
03 - Vendor Selection Bid Review (BIDVS)	This process is for reviewing and approving the winning bid/vendor and encompass bidding/GS quotes, rotation, and justification.
04 - Drawing & Design Plan Review (DDPR)	Drawing and design plan review process.
05 - Commitment Approval (CA)	This process is for creating and approving commitments in e-Builder.
05 - Minor Project Proposal (MPP)	This process is used to obtain funding from a Client to move forward with Design and/or construction.
06 - Potential Change Order (PCO)	This process is for receiving potential change orders (Addendum & Add Services). This process will be used in conjunction with the Change Order (CO) process for bundling multiple PCOs into a single CO.
07AS -Additional Service (AS)	This process is used for projects where the A/E is under contract typically for Major projects.
07B - Commitment Transfer Process (CTP)	This process is used to execute the following transfers: Line to Line Buyout Savings Contractor Contingency/Buyout Savings Use
07C - Purchase Order Revision (POR)	This process is used to submit for a Purchase Order Contract Change for continuing service or ODP contracts that us a Purchase order as a means of conveying scope and cost.
08 - Contractor Pay-App & Consultant Invoice (PMT)	Invoice Approval / Payment Application process for invoicing consultant contracts and construction pay apps.
08A - Owner Direct Purchase Invoice (ODP)	Use this process for the processing of invoice processing (ODP).
08B - Internal UCF Invoice Payments (UPMT)	Internal billing for UCF departments
09 - Substantial Completion (SC)	Process for working through standard completion procedures

Start Step

This kick-off step is initiated by the General Contractor or, if necessary, the PDC Project Manager and includes the following sections in which the listed information is collected. The process should only be submitted once all required documents have been properly named and packaged.

General Project Information

<p>* Does the project Include a lab space:</p> <p><input type="radio"/> Yes <input type="radio"/> No</p>	<p>For routing purposes, identify whether the project included lab-type spaces.</p>
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General Project Information – this Yes/No question determine how the workflow will route. An accurate response is crucial.

General Project Information (see page 4)– UCF requires that all of the following are required to obtain Owner's Substantial Completion when the item was included as part of the scope of the project:

- 5) Certificate of Occupancy or Completion
- 6) Permit Card with Inspections
- 7) Certificate of Substantial Completion
- 8) Construction Document Changes Submitted to BCO for Revision Review
- 9) Letter from EOR Confirming Arc Flash Studies
- 10) Arc Flash Studies
- 11) Lightning Protection Certificate

Please attach related corresponding documentation in the upload fields on the page for each item that is checked. Deselect any line item that does not pertain to the project and leave the corresponding upload fields empty. Any item with a checkbox requires a corresponding uploaded document(s) before submission of this process. If a document submission for a specific data point includes more than one document or file, each of the files should be named as indicated, zipped together in a compressed zip file, and then uploaded. If a box is checked, but no document is uploaded in the corresponding field, the process will be returned for revisions. The naming convention for each file must also be followed or else the process will be returned for revisions.

Certificates

Required Certificate Documentation:	<p>UCF requires that all of the following are required to obtain Owner's Substantial Completion when the item was included as part of the scope of the project. Please attach related corresponding documentation in the upload fields below for each item that is checked. Please deselect any line item that does not pertain to your project and leave the corresponding upload fields empty. Any item with a checkbox requires a corresponding uploaded document before submission of this process. If a box is checked, but no document is uploaded in the corresponding field, the process will be returned for revisions.</p> <p> <input checked="" type="checkbox"/> Certificate of Occupancy or Completion <input checked="" type="checkbox"/> Permit Card with Inspections <input checked="" type="checkbox"/> Certificate of Substantial Completion <input checked="" type="checkbox"/> Construction Document Changes Submitted to BCO for Revision Review <input checked="" type="checkbox"/> Letter from EOR Confirming Arc Flash Studies <input checked="" type="checkbox"/> Arc Flash Studies <input checked="" type="checkbox"/> Lightning Protection Certificate </p>
* Certificate of Occupancy or Completion:	<p><u>Attach the Certificate of Occupancy or Completion issued by the Building Code Office of the University of Central Florida</u></p> <p>Naming Standard: COO_Project Number_Permit Number / Example: COO_UCF-583_18-0220</p> <p> <input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/> </p>
* Permit Card with Inspections:	<p><u>Attach signed-off permit card indicating all inspections have passed. (Both Sides)</u></p> <p>Naming Standard: PRMT_UCF Project Number_Permit Number / Example: PRMT_UCF-583_18-0220</p> <p> <input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/> </p>
Architect of Record Substantial Completion Certificate:	<p><u>Attach a copy of the Architect of Record Substantial Completion Certificate with terms agreed on by the Architect, Contractor and Owner. This document must be signed by Owner, Contractor and A/E before it is uploaded.</u></p> <p>Naming Standard: AECERTSC_Architect Company Name_UCF Project Number / Example: AECERTSC_DAI_UCF-583</p> <p> <input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/> </p>
Changes to CDs have been reviewed by Building Code Office:	<p><u>Attach a signed and sealed letter from all project Architect's and Engineer's of Record attesting that all required changes to Construction Documents due to RFIs, ASIs and CCDs have been incorporated into submitted Revisions reviewed and approved by the Building Code Office.</u></p> <p>Naming Standard: LTR_AOR and EOR_BCO reviewed changes to CDs_UCF Project Number / Example: LTR_AOR and EOR_BCO reviewed changes to CDs_UCF-583</p> <p> <input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/> </p>
Confirmation from EOR Regarding Arc Flash:	<p><u>Attach signed and sealed letter from the Engineer of Record or Commissioning Agent that Arc Flash calculations and coordination studies have been completed and labels have been installed.</u></p> <p>Naming Standard: LTR_EOR_Arc Flash_UCF Project Number / Example: LTR_EOR_Arc Flash_UCF-583</p> <p> <input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/> </p>
Arc Flash Coordination Studies:	<p><u>Attach Arc Flash Coordination Studies</u></p> <p>Naming Standard: Arc Flash_UCF Project Number / Example: Arc Flash_UCF-583</p> <p> <input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/> </p>
Lightning Protection Certificate:	<p><u>Attach the Lightning Protection Certificate from the Testing Agency certifying the lighting protection system.</u></p> <p>Naming Standard: Lightning Protection_UCF Project Number / Example: Lightning Protection_UCF-583</p> <p> <input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/> </p>

Close-Out Meeting

Required Close-Out Meeting Documentation:	<p>UCF requires that all of the following are required to obtain Owner's Substantial Completion. Please attach related corresponding close-out meeting agenda, minutes and attendance sheet in the upload fields below. The minutes should indicate that all close-out requirements have been identified, notice of actions required and contractual resolution dates.</p> <p><input checked="" type="checkbox"/> Close-out Meeting Agenda <input checked="" type="checkbox"/> Close-out Meeting Minutes <input checked="" type="checkbox"/> Close-out Meeting Attendance Sheet</p>
* Close-out Meeting Agenda:	<p><u>Attach the Agenda from the project's close-out meeting.</u> Naming Standard: Close-out Agenda_UCF Project Number / Example: Close-out Agenda_UCF-583</p> <p> <input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/> </p>
* Close-out Meeting Minutes:	<p><u>Attach the minutes from the project's close-out meeting.</u> Naming Standard: Close-out Minutes_UCF Project Number / Example: Close-out Minutes_UCF-583</p> <p> <input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/> </p>
* Close-out Meeting Attendance Sheet:	<p><u>Attach close-out meeting attendance sheet.</u> Naming Standard: Close-out Attendance_UCF Project Number / Example: Close-out Attendance_UCF-583</p> <p> <input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/> </p>

Close-Out Meeting – UCF requires that all of the following are required to obtain Owner's Substantial Completion:

- Close-out Meeting Agenda
- Close-out Meeting Minutes
- Close-out Meeting Attendance Sheet

Please attach related corresponding close-out meeting agenda, minutes and attendance sheet in the upload fields on the page. The minutes should indicate that all close-out requirements have been identified, notice of actions required, and contractual resolution dates.

Commissioning Documentation

Required Commissioning Documentation:	<p>UCF requires that all of the following are required to obtain Owner's Substantial Completion when the item was included as part of the scope of the project. Please attach related corresponding documentation in the upload fields below for each item that is checked. Please deselect any line item that does not pertain to your project and leave the corresponding upload fields empty. Any item with a checkbox requires a corresponding uploaded document before submission of this process. If a box is checked, but no document is uploaded in the corresponding field, the process will be returned for revisions.</p> <p> <input checked="" type="checkbox"/> Test and Balance Report with approval from EOR <input checked="" type="checkbox"/> Preliminary Commissioning Issues Log with Letters from EOR CXA and UES <input checked="" type="checkbox"/> CxAgent Confirms Commissioning Testing is 100% Complete in Lab-Type Spaces and Substantially Complete in Non-Lab Spaces <input checked="" type="checkbox"/> Building Envelope Report with Confirmation from Building Envelope Consultant </p>
Test and Balance Report:	<p>Attach initial Test and Balance Report that has been approved (or approved as noted) by the Engineer of Record.</p> <p>Naming Standard: ITB_EOR Company UCF Project Number / Example: ITB_Premiere TandB_UCF-583</p> <p> <input type="text"/> Drag and drop file here or <input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/> </p>
Preliminary Commissioning Report and Acceptance by EOR, CxAgent and UES:	<p>Attach the Cx Issues Log and confirmation from the Engineer of Record, the Commissioning Agent, and UCF UES that all systems requiring commissioning are operating as noted in the commissioning log. The systems to be commissioned have been tested and the commissioning report has been submitted with issues, issue status, and contractual completion dates for all systems requiring commissioning per the approved commissioning plan.</p> <p>Naming Standard for zip file and included documents</p> <p>Preliminary Commissioning Zip File: PCX_UCF Project Number (This should include the Cx Issues Log and the Letters from EOR, CxAgent and UES) / Example: PCX_UCF-583</p> <p>Preliminary Cx Issue Log: PCX_IssuesLog_UCF Project Number / Example: PCX_IssuesLog_UCF-583</p> <p>Letter from EOR: LTR_EOR_Cx Systems Operating as Noted_UCF Project Number / Example: LTR_EOR_Cx Systems Operating as Noted_UCF-583</p> <p>Letter from CxAgent: LTR_CXA_Cx Systems Operating as Noted_UCF Project Number / Example: LTR_CXA_Cx Systems Operating as Noted_UCF-583</p> <p>Letter from UES: LTR_UES_Cx Systems Operating as Noted_UCF Project Number / Example: LTR_UES_Cx Systems Operating as Noted_UCF-583</p> <p> <input type="text"/> Drag and drop file here or <input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/> </p>
Cx Agent Confirms Commissioning Testing is Complete:	<p>Attach Letter from the Commissioning Agent attesting that commissioning testing is 100% complete for the laboratory-type spaces and that commissioning in non-laboratory type spaces is substantially complete and that the preliminary commissioning report has been approved by the Engineer of Record. A schedule, including all remaining commissioning activities, is submitted, and completion is tied into Contract Final Completion date.</p> <p>Naming Standard: LTR_CXA_CX Testing Complete_UCF Project Number / Example: LTR_CXA_CX Testing Complete_UCF-583</p> <p> <input type="text"/> Drag and drop file here or <input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/> </p>
Building Envelope Report and Confirmation:	<p>Attach letter from the Building Envelope Consultant along with the final building envelope report stating that the roof and building envelope are complete as installed and in compliance with the Contract documents.</p> <p>Naming Standard: Envelope_UCF Project Number / Example: Envelope_UCF-583</p> <p> <input type="text"/> Drag and drop file here or <input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/> </p>

Commissioning Documentation – UCF requires that all of the following are required to obtain Owner's Substantial Completion when the item was included as part of the scope of the project:

- Test and Balance Report with approval from EOR
- Preliminary Commissioning Issues Log with Letters from EOR CXA and UES
- CxAgent Confirms Commissioning Testing is 100% Complete in Lab-Type Spaces and Substantially Complete in Non-Lab Spaces
- Building Envelope Report with Confirmation from Building Envelope Consultant

Please attach related corresponding documentation in the upload fields on the page for each item that is checked. Please deselect any line item that does not pertain to your project and leave the corresponding upload fields empty. Any item with a checkbox requires a corresponding uploaded



document before submission of this process. If a box is checked, but no document is uploaded in the corresponding field, the process will be returned for revisions.



Close-Out Documents

Required Close-out Documents:	<p>UCF requires that all of the following are required to obtain Owner's Substantial Completion when the item was included as part of the scope of the project. Please attach related corresponding documentation in the upload fields below for each item that is checked. Please deselect any line item that does not pertain to your project and leave the corresponding upload fields empty. Any item with a checkbox requires a corresponding uploaded document before submission of this process. If a box is checked, but no document is uploaded in the corresponding field, the process will be returned for revisions.</p> <p> <input checked="" type="checkbox"/> Contractor's As-builts <input checked="" type="checkbox"/> Contractor Warranty <input checked="" type="checkbox"/> Project Asset Table <input checked="" type="checkbox"/> Manufacturer Warranties and O&M <input checked="" type="checkbox"/> Subcontractor Warranties <input checked="" type="checkbox"/> Punch List <input checked="" type="checkbox"/> LEED </p>
★ Contractor's As-built Documents:	<p><u>Attach complete set of Contractor's As-Built Documents. Every sheet of the complete As-Built Drawing package must be stamped As-built and dated in the lower right-hand corner whether or not there are changes in that plan sheet. Drawings must be a complete package, not just a collection of the pages containing changes. MEPF discipline as-built sets may be submitted as individual files that are zipped into the primary project As-built file.</u></p> <p>Naming Standards Complete As-built zip file: ASBLT_UCF Project Number_Contractor Company / Example: ASBLT_UCF583_WSI Mechanical Discipline As-built: ASBLT_MECH_UCF Project Number_Contractor Company / Example: ASBLT_MECH_UCF-583_Trane Electrical Discipline As-built: ASBLT_ELEC_UCF Project Number_Contractor Company Name / Example: ASBLT_ELEC_UCF-583_Bright Lights Plumbing Discipline As-built: ASBLT_PLUM_UCF Project Number_Contractor Company / Example: ASBLT_PLUM_UCF-583_Waterworks Fire Sprinkler Discipline As-built: ASBLT_FIRE_UCF Project Number_Contractor Company / Example ASBLT_FIRE_UCF-583_Blaze</p> <p> <input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/> </p>
★ Contractor Warranty:	<p><u>Attach the General Contractor Final Warranty. Contractor warranties must specify the warranty start date and end date (or duration), specify the project and coverages of the warranty, and be signed by an authorized representative of the company providing the warranty. Unless otherwise agreed upon by the owner and contractor and noted on the A/E Certificate of Substantial Completion, contractor warranties shall begin at the date of Certificate of Occupancy or Certificate of Completion. (Draft warranties are not acceptable)</u></p> <p>Naming Standard: WTY_GC_UCF Project Number_GC Company Name / Example: WTY_GC_UCF-583_WSI</p> <p> <input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/> </p>
Project Asset Table:	<p><u>Attach Project Asset Table. (Template and Instructions at Project Asset Table)</u></p> <p>Naming Standard: ASSET_UCF Project Number_Contractor Company / Example ASSET_UCF-583_WSI</p> <p> <input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/> </p>
Manufacturer Warranties and O&M:	<p><u>Attach all of the individual files for manufacturer's O&Ms and warranties for the project. Files should be bound into a zip file. The zip file and individual files should be named as referenced below. Warranties that require Owner's Acceptance must be fully executed before upload.</u></p> <p>Naming Standard: Warranty and O&M Information Zip File: WOM_UCF Project Number_Prime Contractor / Example: WOM_UCF-583_WSI Manufacturer O&M Files: CSI Division+Section+Subsection_O&M_Item Description / Example: 087100_O&M_Door Hardware Manufacturer Warranty Files: CSI Division+Section+Subsection_WTY_Item Description / Example: 233616_WTY_VAV Units Combined Manufacturer Warranty and O&M Files (when the manufacturer provides WTY and O&M as one document): CSI Division+Section+Subsection_WOM_Item Description / Example: 096813_WOM_Tile Carpeting</p> <p> <input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/> </p>
Subcontractor Warranties:	<p><u>Attach a zip file of all sub-contractor warranties. Contractor warranties must specify the warranty start date and end date (or duration), specify the project and coverages of the warranty, and be signed by an authorized representative of the company providing the warranty. Unless otherwise agreed upon by the owner and contractor and noted on the A/E Certificate of Substantial Completion, contractor warranties shall begin at the date of Certificate of Occupancy or Certificate of Completion. Warranties that require Owner's Acceptance must be fully executed before upload. (Draft warranties are not acceptable and equipment and materials warranties should be provided under O&M)</u></p> <p>Naming Standard Sub-contractor warranty zip file: WTYSUB_UCF Project Number / Example: WTYSUB_UCF-583 Sub-contractor warranty by discipline: WTY_Trade Discipline_Contractor Name_UCF Project Number / Examples: WTY_Plumbing_Waterworks_UCF-583 or WTY_Electrical_Bright Lights_UCF-583</p> <p> <input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/> </p>
Punch List:	<p><u>Attach copy of punch list with agreed upon completion dates.</u></p> <p>Naming Standard: PUNCH_UCF Project Number / Example: PUNCH_UCF-583</p> <p> <input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/> </p>
LEED Documents Submitted to LEED Administrator:	<p><u>Attach letter from Contractor indicating that all LEED documents have been submitted and approved by the party responsible for LEED administration. All LEED documents for the design and construction phases have been submitted to LEED Online and corresponding assigned credit forms have been completed and marked 'Ready for Review.'</u></p> <p>Naming Standard: LTR_CONTRACTOR_LEED documents submitted_UCF Project Number / Example: LTR_CONTRACTOR_LEED documents submitted_UCF-583</p> <p> <input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/> </p>

Close-Out Documents – UCF requires that all of the following are required to obtain Owner's Substantial Completion when the item was included as part of the scope of the project:

- Contractor's As-builts
- Contractor Warranty
- Project Asset Table
- Manufacturer Warranties and O&M
- Subcontractor Warranties
- Punch List
- LEED

Please attach related corresponding documentation in the upload fields on the page for each item that is checked. Please deselect any line item that does not pertain to your project and leave the corresponding upload fields empty. Any item with a checkbox requires a corresponding uploaded document before submission of this process. If a box is checked, but no document is uploaded in the corresponding field, the process will be returned for revisions.

Operations Review

Building Turnover Required Documentation:	<p>UCF's requires that all of the following are required to obtain Owner's Substantial Completion when the item was included as part of the scope of the project. Please attach related corresponding documentation in the upload fields below for each item that is checked. Please deselect any line item that does not pertain to your project and leave the corresponding upload fields empty. Any item with a checkbox requires a corresponding uploaded document before submission of this process. If a box is checked, but no document is uploaded in the corresponding field, the process will be returned for revisions.</p> <p><input checked="" type="checkbox"/> UCF Locksmith Confirms Lock Core Changes are Complete</p> <p><input checked="" type="checkbox"/> Confirmation that Utilities meters are Operational and Ready for Transfer</p> <p><input checked="" type="checkbox"/> UES Concurrency Certificate</p> <p><input checked="" type="checkbox"/> Owner's Training Schedule</p> <p><input checked="" type="checkbox"/> Building Cleaning Confirmation</p>
UCF Locksmith Confirms Lock Core Changes Complete:	<p><u>Attach confirmation from the UCF Locksmith that lock cores have been changed to UCF lock cores.</u></p> <p>Naming Standard: LOCKS_UCF Project Number / Example: LOCKS_UCF-583</p> <p><input type="text"/> Drag and drop file here or <input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/></p>
Confirmation that Utilities Meters are Operational and Ready for Transfer:	<p><u>Attach letter of confirmation from the contractor that all utility meters have been connected, tested, and are operational and accepted by the Utilities & Energy Services (UES). Utility cost responsibility is ready to be transferred to the Owner</u></p> <p>Naming Standard: LTR_CONTRACTOR_Meters Ready For Transfer_UCF Project Number / Example: LTR_CONTRACTOR_Meters Ready For Transfer_UCF-583</p> <p><input type="text"/> Drag and drop file here or <input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/></p>
Concurrency Certificate:	<p><u>Attach concurrency certificate of utility capacity reservation from UES stating service levels are met in accordance with FL Chapter 163.3180.</u></p> <p>Naming Standard: Concurrency_UCF Project Number / Example: Concurrency_UCF-583</p> <p><input type="text"/> Drag and drop file here or <input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/></p>
Training Schedule:	<p><u>Attach the training schedule matrix for Owner training of equipment.</u></p> <p>Naming Standard: TRNMATRIX_UCF Project Number / Example: TRNMATRIX_UCF-583</p> <p><input type="text"/> Drag and drop file here or <input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/></p>
Building Cleaning Confirmation:	<p><u>Attach email confirmation from Facilities Operations and UCF Project Manager that building cleaning has been completed to the Owner's satisfaction.</u></p> <p>Naming Standard: MSG_CLEAN_UCF Project Number / Example: MSG_CLEAN_UCF-583</p> <p><input type="text"/> Drag and drop file here or <input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/></p>

Operations Review – UCF's requires that all of the following are required to obtain Owner's Substantial Completion when the item was included as part of the scope of the project:

- UCF Locksmith Confirms Lock Core Changes are Complete
- Confirmation that Utilities meters are Operational and Ready for Transfer
- UES Concurrency Certificate
- Owner's Training Schedule
- Building Cleaning Confirmation

Please attach related corresponding documentation in the upload fields on the page for each item that is checked. Please deselect any line item that does not pertain to your project and leave the corresponding upload fields empty. Any item with a checkbox requires a corresponding uploaded document before submission of this process. If a box is checked, but no document is uploaded in the corresponding field, the process will be returned for revisions.

Insurance Documents

Required Insurance Documents:	<p>UCF's requires that all of the following are required to obtain Owner's Substantial Completion when the item was included as part of the scope of the project. Please attach related corresponding documentation in the upload fields below for each item that is checked. Please deselect any line item that does not pertain to your project and leave the corresponding upload fields empty. Any item with a checkbox requires a corresponding uploaded document before submission of this process. If a box is checked, but no document is uploaded in the corresponding field, the process will be returned for revisions.</p> <p> <input checked="" type="checkbox"/> First Floor Elevation Survey <input checked="" type="checkbox"/> Contractor Confirms First Floor Elevations Installed as Designed <input checked="" type="checkbox"/> Insurance Form </p>
First Floor Elevation Survey:	<p><u>Attach survey of the elevation of all first floor entry/exit doors.</u></p> <p>Naming Standard: Elevation_UCF Project Number / Example: Elevation_UCF-583</p> <p> <input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/> </p>
Contractor Confirms First Floor Elevations Installed as Designed:	<p><u>Attach confirmation letter from the Contractor's License holder that the elevations are installed in accordance with the Contract documents.</u></p> <p>Naming Standard: LTR_CONTRACTOR_First Floor Elevations_UCF Project Number / Example: LTR_CONTRACTOR_First Floor Elevations_UCF-583</p> <p> <input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/> </p>
Insurance Form:	<p><u>Attach the Building Insurance Information Form.</u> (Template found at Building Insurance Form)</p> <p>Naming Standard: Building Insurance_UCF Project Number / Example: Building Insurance_UCF-583</p> <p> <input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/> </p>

Insurance Documents – UCF's requires that all of the following are required to obtain Owner's Substantial Completion when the item was included as part of the scope of the project:

- First Floor Elevation Survey
- Contractor Confirms First Floor Elevations Installed as Designed
- Insurance Form

Please attach related corresponding documentation in the upload fields on the page for each item that is checked. Please deselect any line item that does not pertain to your project and leave the corresponding upload fields empty. Any item with a checkbox requires a corresponding uploaded

document before submission of this process. If a box is checked, but no document is uploaded in the corresponding field, the process will be returned for revisions.

Substantial Completion Statements

<p>* Contractor Confirmation:</p>	<p>By submission of this process, I "The Contractor" confirm that all Owner's Substantial Completion terms of the Contract have been met. Additionally, I confirm that I have provided true and accurate documents corresponding to the scope of the project and that those documents have been named and packaged correctly, as instructed within the the form.</p> <p><input type="checkbox"/> Confirmed</p>
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Substantial Completion Statements –The Contractor must confirm that all Owner's Substantial Completion terms of the Contract have been met by checking the box.

It is possible to save the process as a draft and return to it later to finish adding information and uploading documents similarly to how one would save a Microsoft Word file to return to it later. Click the Save Draft button to save your work.

09 - Substantial Completion (SC)

Start Process

Instructions

Print Check Spelling Submit **Save Draft** Cancel

Resume work from the Processes page by clicking on the draft process (listed in *brown italics*).

Home Dashboard Projects Forms **Processes** Documents Contacts Bidding Cost Schedule Reports Setup ...

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Recent Pages...

Project Menu

- Details
- Planning
- Forms
- Issues
- Processes**
- Documents
- Schedule
- Cost
- Contacts
- Calendar
- Bidding
- Submittals

Processes for 2018-001 - JUCF Process Testing Project

Unfinished Drafts | Import Processes

Filter Processes

Search In ☐ Processes Initiated By Me ☐ Processes In My Court ☒ All Processes

Type of Process ☒ Draft ☐ Open ☐ Finished

Status

Step Name

Containing Text

Filter

Process	Subject	Step	Responsible Actors	Step Age	In Step Since	Date Created	Created By	Process Age	Status	Requested Comment
<input type="checkbox"/>	SC	Substantial Completion Checklist and Approval for JUCF Process Testing Project				06.05.2020	Mason, Samantha eSAdmin		NotAssigned	

It is recommended to Save Draft periodically while working on the process to ensure that progress is not lost in the event of a power failure or Internet outage.

Project Administrator Review

The Project Administrator is required to confirm that the provided documents are packaged and named correctly. The PA shall review the provided documents, complete the substantial completion statement at the bottom of the page, and approve. Otherwise, the PA may choose "Revise to GC" with comment, specifying any concerns.

Substantial Completion Statements

<p>* Project Assistant Document Review Confirmation:</p>	<p>I, Project Assistant, have reviewed the provided documents and confirm that the documents conform to the naming and packaging requirements.</p> <p><input type="radio"/> Confirmed</p>
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A/E Review

The A/E is required to review and approve the submitted documents. The A/E review the provided documents, complete the substantial completion statement at the bottom of the page, and approve. Otherwise, the A/E may choose "Revise to GC" with comment, specifying any concerns.

Substantial Completion Statements

<p>* Architect of Record Confirmation:</p>	<p>I, the Architect of Record, confirm that I have reviewed the documents provided by the contractor to verify their accuracy and completeness in line with the construction administration scope of my contract. If any documents are found to be missing, incomplete or inaccurate, the process will be returned to the contractor for revisions with comment. Furthermore, I confirm that I have received the Contractor's As-Built Documents for review and have begun to incorporate changes into the final Record Drawings. I confirm that the project is substantially complete as defined by the terms of the Contract.</p> <p><input type="radio"/> Confirmed</p>
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Project Manager Review

The UCF Project Manager must complete PM tasks, review documents provided by Contractor for accuracy and completeness, and then sign off at the bottom of the page.

Project Manager Tasks

<p>PM Provides Confirmation from UES that Utilities Are Transferred:</p>	<p>If the project required utility costs be transferred from the project account to a UES account, the PM will work with FSBO and UES to facilitate the final meter read and have utility cost transferred. Attach confirmation from UES that the final meter reading has been completed and utilities have been transferred.</p> <p>Naming Standard: LTR_UES_Uilities Transferred_UCF Project Number / Example: LTR_UES_Uilities Transferred_UCF -583</p> <div> <div>Drag and drop file here</div> <div>or</div> <div>Browse e-Builder</div> <div>Browse Computer</div> </div>
<p>PM Confirms Building Insurance Info Form Sent to Risk Management:</p>	<p>PM attaches confirmation from Risk Management that Building Insurance Information Form was received.</p> <p>Naming Standard: MSG_Insurance Form Received_UCF Project Number / Example: MSG_Insurance Form Received_UCF-583</p> <div> <div>Drag and drop file here</div> <div>or</div> <div>Browse e-Builder</div> <div>Browse Computer</div> </div>

Substantial Completion Statements

<p>* Project Manager Confirmation:</p>	<p>I, the UCF Project Manager, confirm that I have reviewed all of the documents submitted by the Contractor for accuracy and completeness. I confirm all Owner's Substantial Completion terms of the Contract have been met.</p> <p><input type="checkbox"/> Confirmed</p>
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Asset Manager Review

The Asset Manager must review the provided documents, complete the substantial completion statement below, and approve. Otherwise, choose "Revise to GC" with comment, specifying any concerns.

Substantial Completion Statements

<p>* Asset Management Confirmation:</p>	<p>I, Representative of RA Asset Management, confirm that I have reviewed the asset, warranty and O&M documentation for accuracy and completeness and approve that the change request in AiM be initiated. RA Asset Management will upload all desired warranty and O&M information to the CMMS and tag all assets within 30 days of the change request. At such time, the primary responsibility of of warranty claims will pass from the project team to the operations team. If the documents provided by the contractor are found to be not satisfactory, I will revise the process back to the contractor with comment for revisions.</p> <p><input type="radio"/> Confirmed</p>
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PCOS Asset Management Exchange

The Project Assistant must create a change request in the CMMS to share assets, O&M, and warranties with RA Asset Management. Once complete, confirm and enter the date the step was completed.

Substantial Completion Statements

<p>* PCOS Confirms Change Request for CMMS Complete:</p>	<p>I, Project Close-out Specialist, confirm that I have initiated the CMMS Change Request for this project that shares project warranty, asset and O&M information with the RA Asset Management Team.</p> <p><input type="radio"/> Confirmed</p>
<p>* Date Work Order Modified For Asset Management:</p>	<p>Enter the date that the CR for Asset Management was completed. This date will auto-populate on the project details page.</p> <p><input type="text"/> </p>

Director Review

This step requires Director review and approval and applies to multiple departments. Review any of the provided documents of interest. To recommend this project for substantial completion choose "Approved" from the drop-down menu and then select "Take Action." Otherwise, choose "Revise to PM" with comment, specifying any concerns.



Substantial Completion Issuance

After the process has completed review, e-Builder will send an e-mail to the initiator and the Project Manager with the Owners' Substantial Completion letter attached.