Project: **Project Name & (eB #)**

Close out occurs when the Temporary Certificate of Occupancy (TCO) or Certificate of Occupancy (COO) or Certificate of Completion (CC) is issued.

**Close Out Phase Expectations**

<table>
<thead>
<tr>
<th>Project Size</th>
<th>Closeout Phase</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;$500k</td>
<td>3 months</td>
</tr>
<tr>
<td>$500K-$2M</td>
<td>3*-6 months</td>
</tr>
<tr>
<td>$2-$5M</td>
<td>10-12 months</td>
</tr>
<tr>
<td>&gt;$5M</td>
<td>14 months</td>
</tr>
<tr>
<td></td>
<td>*Single trade project</td>
</tr>
</tbody>
</table>

**Finalize Facilities Management Turnover (FMT)**

- Issue Turnover letter to Facilities Management, *FMT Letter Template*
- Contact Customer Service (CS) and Energy Management and Controls Services (EMCS) teams to let them know project has attained TCO and project is now turned over to FM
- Turn over all O&M’s to Facilities Inventory Group (FIG)
- Turn over Attic Stock to FM
- Close out all Shop inspection items
- Turn over all Warranties to FM *Warranty Guidance* (Section 01 78 36), *Warranty Log (TBD), Warranty Template (TBD)*
- Provide Fixed Equipment info to FM for MAXIMO, *017822 GR’s*
- Provide Roofing System info to FM for MAXIMO, *017822 GR’s*
- Provide System commissioning to FM
☐ Provide Completed Punchlist to FM

☐ Initiate Financial Close Out for the Project in CL2

☐ Prepare Project Documentation for Archiving *(CU Policy 4.7)*
  ☐ Contractor Related Documentation (C5-Red Zone)
  ☐ Architect/Consultant Related (C5)
  ☐ Authority Having Jurisdiction Related (C5)

Resources:

*eBuilder Closeout Process Guidance Document*