

# Close Out Phase Master Checklist

# CL1

## 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

Project Size	Closeout Phase
<\$500k	3 months
\$500K-\$2M	3*-6 months
\$2-\$5M	10-12 months
>\$5M	14 months
	*Single trade project

### Finalize Post Occupancy Activities:

- Perform 10 month warranty walkthrough
- 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 any outstanding Warranties to FM [Warranty Guidance](#) (Section 01 78 36)
- 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 (C6-Red Zone)
  - Architect/Consultant Related (C6)
  - Authority Having Jurisdiction Related (C6)