Infrastructure Planning and Facilities
MICHIGAN STATE UNIVERSITY

Purpose

This procedure will cover the process of turning in the deliverables required by FIS (marked-up as-builts, subcontractor as-builts, shop drawings, operation and maintenance data, warranties and FADE) to the FIS team. It is broken down by the role you are representing for that particular MSU project.

Participants

Project Manager
FIS As-Built Representative
FIS EAM/FIS EAM/FADE Coordinator

Policy

Contractor and Consultant Final Payments will not be approved until the required deliverables are turned into FIS. PM to send FIS the form and we will begin this process at 97% completion.

Quick Procedure

1. Project Manager:
    a. Make sure all required As-Builts and Submittals are uploaded into either Plangrid or Unifier.
    b. At 97% completion, ensure all Unifier BPs are closed (especially submittals and transmittals)
        • Fill out the **Records Transmittal – Closeout** form, specify which system was used for the project and email to Kendra (kingkend@msu.edu).

2. FIS As-Built Representative reviews the transmittal and double checks that everything is filled out correctly. They also make sure all as-builts indicated on the transmittal are included (hard copy, unifier submittals, plangrid). If there are submittals, the transmittal is given to the FIS EAM/FADE Coordinator.

3. FIS EAM/FADE Coordinator verifies the Submittals are in Unifier or Plangrid and correct. Works with the Asset Management team to verify any tracked assets are captured on the FADE spreadsheet correctly and the submittals match. If all is good, the transmittal is signed and returned to the FIS As-Built Representative. If items are missing, the appropriate people are contacted (copy Jill Tuley and Kevin Durkin).

4. FIS As-Built Representative - The transmittal is signed and added to Meridian, then emailed to the Project Manager.

5. Project Manager attaches the completed and signed **Records Transmittal – Closeout** to the final payment application BP in Unifier at their step.

6. FIS As-Built Representative verifies that the completed and signed **Records Transmittal – Closeout** is attached to the final payment application BP in Unifier at their step. If yes, payment BP is approved by FIS, if no, payment BP is returned for revision.

    a. Note: for the AE final payment application BPs, FIS is looking for the final record drawing set from the Consultant(s). If we have received the Translucent Bond/Vellum set, PDF and AutoCAD

set, we approve final payment. If not, we return it for revision.

Detailed Procedure

1. <u>Project Manager</u>

    a. As-Built Drawings:
        i. Obtains the marked-up as-built drawings and any other As-Built drawings from the contractor. They fill out the **Records Transmittal – Closeout** form and upload the drawings into Unifier or Plangrid documents – drawings folder (or have contractor upload them). At 97% completion, they send the filled-out transmittal to the FIS As-Built Representative. Files should be submitted in PDF format, with no special formatting, securities or password protections.
        ii. **A COMPLETE marked-up bid set is required. If nothing was changed, we still need a complete set that is marked as 'as-built' by the contractor.**
            1. <u>Unifier:</u> As-Built drawings can be submitted electronically in Unifier using the Submittals BP process.
            2. <u>Plangrid:</u> Completed marked-up set or subcontractor as-builts can be uploaded into the Documents – Drawings folder and indicated on transmittal that drawings are in Plangrid.
        iii. Sheet 2 of the **Records Transmittal – Closeout** is for further description of the drawing sets included with the transmittal. If it is only the bid set, the rest of the lines can be ignored. If there are drawings in addition to the marked-up bid set, the additional lines can be filled out (typically separate subcontractor sets).

    b. Operation and Maintenance Data:
        i. O&M and Warranty data can be submitted electronically in Unifier using the Submittals BP process or in Plangrid Submittals. Each asset type or equipment/material is required to be a separate BP record. The traditional 'MANUAL' will not be accepted electronically. Each item needs to be its own BP record, just as the shop drawings are submitted.   Files should be submitted in PDF format, with no special formatting, securities or password protections. Mark the box on the **Records Transmittal – Closeout** form indicating which system the O&Ms are submitted in.
        ii. If Shop Drawings are in a different system than the O&Ms and Warranties, please denote that on the transmittal form.
        iii. If no O&Ms are required for the project, mark the box on the **Records Transmittal – Closeout.**
        iv. If FADE was required, please denote that on the **Records Transmittal – Closeout form.**

2. <u>FIS As-Built Representative</u> collects the as-builts and **Records Transmittal – Closeout** and double checks that everything is filled out correctly. They also make sure all as-builts indicated on the transmittal are received. If there are submittals, the transmittal is given to the FIS EAM/FADE Coordinator.

3. <u>FIS EAM/FADE Coordinator</u> verifies the Submittals, O&Ms, Shop Drawings, Warranties, and Testing and Reading documents are submitted and if they are tracked assets, correct according to the FADE spreadsheet and what was installed. If all is good, the transmittal is signed and returned to the FIS As-Built Representative. If items are missing, the appropriate people are contacted.

4. <u>FIS As-Built Representative</u> signs the **Records Transmittal – Closeout** and adds it to the document management system, then emails it to the Project Manager.
    a. They add marked-up as-built drawings to the document management system and send them to the Consultant to create the final record drawing set. They add any additional drawings from subcontractors into the document management system that were not part of the bid set. Hard Copies of the Final drawings are sent to University Archives for permanent retention.
    b. The O&M manuals and warranties are prioritized and assigned to an FIS student to process from Unifier or Plangrid into the document management system.
    c. Equipment Numbers are linked to the documents for tracked assets if applicable.

5. <u>Project Manager</u> attaches the completed and signed **Records Transmittal – Closeout** to the final payment application BP in Unifier at their step.

6. <u>FIS As-Built Representative</u> verifies the completed and signed **Records Transmittal – Closeout** is attached to the final payment application BP in Unifier at their step. If yes, payment BP is approved by FIS, if no, payment BP returned for revision.

    a. Note: for the AE final payment application BPs, FIS is looking for the final record drawing set from the Consultant(s). If we have received the translucent bond/vellum set, PDF set and the AutoCAD set (and revit if applicable), we approve final payment. If not, we return for revision.

Revision History and Owner of Document