

## Energy Services Construction Completion Checklist

<b>PROJECT TITLE:</b>	<b>PROJECT NUMBER:</b>	<b>DATE:</b>

**AGENCY:**  **FACILITY:**

<input checked="" type="checkbox"/>	<b>ACTION:</b>
	(1) Final inspection: ESCO, Energy-PM, Utility, & Owner. <ul style="list-style-type: none"> <li>Items found after final inspection will be placed on the warranty list unless the item significantly impairs the operation of the facility.</li> <li>ESCO completes work identified on the punch list.</li> </ul>
	(2) ESCO issues a Notice of Commencement of Energy Savings, Substantial Completion, and ESCO one-year warranty letters within 30 days of the date. <ul style="list-style-type: none"> <li>NCES and substantial completion are on the same date.</li> </ul>
	(3) Energy PM sends NCES, substantial completion, and ESCO warranty letters to the contract specialists and client agency.
	(4) Energy PM requests invoicing of DES project management fees to client agency, at time of substantial completion.
	(5) ESCO provides an accounting of final costs, along with final invoices if not previously submitted.
	(6) Energy PM verifies the final invoiced amount against PTS contract values. If values do not match notify ESCO/Client that an amendment or deduction to contracts is needed.
	(7) Energy PM verifies that the following change orders or amendments are processed: <ul style="list-style-type: none"> <li>Construction change order (additive or deductive) processed as necessary. Bring final contract value to actual cost and add days to match completion date to NCES/Substantial Completion. If not changing contract value, change order is not necessarily required for days only.</li> <li>Professional service amendment, as needed, is processed (for example, ESCO not meeting apprenticeship requirements.)</li> <li>Time extension change order approved and processed (if required).</li> </ul>
	(8) Energy PM Confirm in the Department of Labor and Industries (LNI) portal all intents, affidavits, and certified payroll have been filed. Projects with required apprenticeship confirm 15% met, if not met confirm Good Faith Effort (GFE) documentation approved and uploaded to LNI

	<p>(9) ESCO confirms utility notified of installation and provides client/DES determination of the amount and when the agency may expect to see incentive check.</p>
	<p>(10) Energy PM confirms receipt of and delivery to the client and DES of the following:</p> <ul style="list-style-type: none"> <li>• Electrical inspection</li> <li>• Boiler inspection</li> <li>• Air quality inspection</li> <li>• 100% construction design documents, permit drawings, and as-builts</li> <li>• Final light levels for lighting projects</li> <li>• O&amp;M manuals to include:             <ol style="list-style-type: none"> <li>1. Operator training log</li> <li>2. Post-installation M&amp;V report</li> <li>3. As-built drawings</li> <li>4. Show drawing/submittals</li> <li>5. Test reports</li> <li>6. Disposal manifests</li> <li>7. Certificate of warranty from subcontractors</li> <li>8. Spare material and parts list</li> <li>9. Commissioning/balance reports</li> <li>10. Warranty responsibility contacts</li> </ol> </li> <li>• List of manufacturer equipment warranty periods begin date and length of warranty for the installed equipment</li> <li>• Confirm B2GNow audits are up to date</li> </ul>
	<p>(11) Energy PM fills out the DES Completion Notice Form and obtains signatures.</p>
	<p>(12) Energy CS notification of final acceptance to ESCO and client agency (email from contracts section); post the notice in the paper, and the 45-day lien period begins.</p>
	<p>(13) Energy PM submits State of WA "Notice of Completion of Public Works Contract" form F215-308-000 in the LNI portal. With a copy provided to Contracts, ESCO, and Client Agency.</p> <ul style="list-style-type: none"> <li>• Once received send to the client and the ESCO "Retainage Release" letter from LNI, "Certificate of Payment of State Excise Taxes by Public Works Contractor" from Revenue (DOR), and "Certificate of Payment of Contributions, Penalties and Interests on Public Works Contract" from Employment Security (ESD)</li> </ul>
	<p>(14) Energy PM submits to client agency approved ESCO retainage invoice.</p>
	<p>(15) Client agency tasks (Energy PM to explain points below to Client agency):</p> <ul style="list-style-type: none"> <li>• Confirm all ESCO invoices paid</li> <li>• Confirms acceptance of work</li> <li>• Client to pay retainage after receipt of above documents from LNI, DOR, ESD, and 45-day retainage release</li> </ul>