

## 500.4 – Phase B Checklist for the Commissioning Authority

This checklist is to be used by the Commissioning Authority during Phase B of the Project.

**Instructions:** The Commissioning Authority shall mark the appropriate check-off box below to indicate completion of each action in accordance with the requirements in the Procedures Manual (including applicable laws, regulations, and requirements) or that the action is not applicable to the Project.

### Project Administration:

- | YES                      | N/A                      |                                                                                                                                                                                                                                              |
|--------------------------|--------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Review:</b> Requirements in Chapter 5 – Phase B Design Development, of the Capital Construction Project Procedures Manual have been reviewed.                                                                                             |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Pre-Design and Phase A Checklist:</b> The Pre-Design and Phase A Checklist have been reviewed. The Architect-Engineer has been consulted to confirm that all carry forward items have been included or attached to the Phase B Checklist. |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Unresolved Issues:</b> The Commissioning Authority has reviewed unresolved or incomplete issues from Phase A.                                                                                                                             |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Team Meetings:</b> The Commissioning Authority has scheduled, conducted and documented Phase B Commissioning Team Meetings.                                                                                                               |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Phase B Pre-Submittal:</b> The Phase B pre-submittal review has been scheduled and meetings have been coordinated.                                                                                                                        |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Design Review Report:</b> The Commissioning Authority has prepared a pre-submission Design Review Report and it has been provided to the Project Manager.                                                                                 |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Commissioning Process Report:</b> The Commissioning Process Report for Phase B has been written and distributed to all Commissioning Team members.                                                                                        |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Phase B Commissioning Plan:</b> An updated Commissioning Plan for Phase B was prepared and provided to the Project Manager and the Architect-Engineer.                                                                                    |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Minutes:</b> The Commissioning Authority has prepared minutes of Commissioning Process activities and decisions; these were distributed to Commissioning Team members and attendees within five (5) workdays of event.                    |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Owner's Project Requirements:</b> Commissioning Team members have been informed of decisions that alter the Owner's Project Requirements.                                                                                                 |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Design Schedule:</b> The Architect-Engineer's changes to the Design Schedule and altered Commissioning activities have been incorporated into the Owner's Project Requirements.                                                           |

### Phase B Commissioning Submittals:

- | YES                      | N/A                      |                                                                                                                                                                                                                                                                |
|--------------------------|--------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Owner's Project Requirements:</b> The Owner's Project Requirements have been updated and provided to the Architect-Engineer and the Project Manager.                                                                                                        |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Systems Basis of Design:</b> The changes, clarifications, and additions to the Systems Basis of Design Document have been reviewed for compliance with the Owner's Project Requirements and changes approved by the Project Manager have been incorporated. |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Integration Plan:</b> An integration plan to incorporate Commissioning requirements into the Project specifications has been prepared.                                                                                                                      |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Forms and Checklists:</b> The outlines for Construction Phase Commissioning Forms and Checklists have been prepared.                                                                                                                                        |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Systems Manual:</b> An outline for the Systems Manual has been prepared for use by the Architect-Engineer.                                                                                                                                                  |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Functional Performance Tests:</b> The Functional Performance Test criteria have been defined for the Architect-Engineer.                                                                                                                                    |

**Phase B Commissioning Submittals: (continued)**

- | YES                      | N/A                      |                                                                                                                                                  |
|--------------------------|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Commissioning Plan:</b> Revisions to the Commissioning Plan have been made that include updates and changes to Project information.           |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Phase B Checklist:</b> The Phase B Submittals Checklist has been verified as complete for each design discipline.                             |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Outline Commissioning Specification:</b> An Outline Commissioning Specification for use by the Architect-Engineer has been prepared.          |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Specification/Outline Integration Plan:</b> A Specification / Commissioning Integration Plan was developed for use by the Architect-Engineer. |
| <input type="checkbox"/> | <input type="checkbox"/> | Prepare a Construction Forms & Checklists Outline for use by the Architect-Engineer                                                              |
| <input type="checkbox"/> | <input type="checkbox"/> | Prepared a Systems Manual Outline for use by the Architect-Engineer.                                                                             |
|                          |                          | <b>Commissioning Requirements:</b> The Architect-Engineer has received Commissioning Requirements for the following Divisions of Work:           |
| <input type="checkbox"/> | <input type="checkbox"/> | Division 210000 - Fire Suppression                                                                                                               |
| <input type="checkbox"/> | <input type="checkbox"/> | Division 220000 - Plumbing                                                                                                                       |
| <input type="checkbox"/> | <input type="checkbox"/> | Division 230000 - HVAC                                                                                                                           |
| <input type="checkbox"/> | <input type="checkbox"/> | Division 250000 - Integrated Automation                                                                                                          |
| <input type="checkbox"/> | <input type="checkbox"/> | Division 260000 - Electrical                                                                                                                     |
| <input type="checkbox"/> | <input type="checkbox"/> | Division 270000 - Communications                                                                                                                 |
| <input type="checkbox"/> | <input type="checkbox"/> | Division 280000 - Electronic Safety & Security                                                                                                   |

**Phase B Review and Approval:**

- | YES                      | N/A                      |                                                                                                                                                            |
|--------------------------|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Owner's Project Requirements:</b> The Commissioning Authority shall review documents for satisfaction of the Owner's Project Requirements.              |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Phase B Commissioning Activities:</b> The Commissioning Authority shall review documents for completion of Commissioning Process activities for Phase B |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Acceptance of the Submittal:</b> The Commissioning Authority shall recommend acceptance of Phase B Submittal to the Using Agency and Owner.             |

**Projects Seeking LEED Certification:**

- | YES                      | N/A                      |                                                                                                                                                                                                                   |
|--------------------------|--------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <b>LEED Commissioning Credits:</b> The Commissioning Authority shall provide the Commissioning Plan and appropriate information to the Architect-Engineer in order to comply with the LEED Commissioning credits. |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Energy Model:</b> The Commissioning Authority shall review the Energy Model to insure the required numbers of points for LEED Energy and Atmosphere Credit 1 are being met.                                    |

**End of Phase B Checklist for the Commissioning Authority**