Steps for closeouts

1. Review specs to see what type of closeout documents are needed by the spec sections we are responsible for. Also within the specs, or you may have to contact the GC, you will find out how they want the closeout docs (paper or electronic and how many copies).
2. You will have to contact the general contractor to find the date of substantial completion. You will need this info for the warranties
3. Reviewing the specs, again make headings on the closeout spreadsheet by spec section. Then input what is needed within each section. These typically are O&M manuals, warranties, owner training, attic stock, and misc (usually as built drawings, etc).
4. Once the spreadsheet is generated, email the vendors requesting the required information. Again, I usually give them 2 weeks. Once that date has come and you don’t have the information, I start hammering them (nicely of course) every 2 days until they get me the information
5. Input the data into the spreadsheet as to the dates you initially sent the request and when they are due
6. Put the received information into electronic folders
7. Make a NEI coversheet to put on top of the closeout info
8. Input the data into the spreadsheet as to which ones you have received and which are still outstanding
9. Contact the GC to see if they want the closeouts all at once or as you get them (again, they may not want to wait that long)
10. Send them to the general contractor