

**STANDARD OPERATING PROCEDURE # FAC 3.006****Subject: Project Folder Contents Checklist**

**Purpose and Scope:** Provide project files that enable auditors and FPC staff to review project folders during and after completion. All Project Managers are required to maintain their file folders and ensure that all information shown below is up to date and in the proper tab.

**Procedures:****Tab 1 – History**

- Work Orders
- Project Request Form
- Scope Statement
- Contact List
- Start & Scheduled Completion
- Building Permit
- Substantial Completion
- Certificate of Occupancy

**Tab 2 – Correspondence / Reports**

- Correspondence / Meeting Minutes
- Letters
- E-Mails/Telephone Notes
- Transmittals
- Permit Inspection Reports
- Field Reports

**Tab 3 – Financial Information**

- Estimates and Quotes
- Fee Proposal Request
- Fee Proposal Responses
- Purchase Requisitions
- Purchase Orders
- Change Orders
- Additional Services

**Tab 4 – Invoices / Pay Applications**

- Invoices/ Pay Applications
- Expense / Budget Tracking Spreadsheet

**Tab 5- Specifications / Drawings**

- Specifications
- Cut Sheets
- Design Documents
- Addenda


**Tab 6 – Close-out**

- Warranties / Waivers / Liens / Affidavits
- Punch List
- Close Out Documents Checklist
- Contractor Evaluation

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