

Master check list information

I. Overview

The project manager's master check list is designed for those involved with, or responsible for, directing, managing, planning, scheduling, expediting or closing out construction projects. It is also intended for the use of planning, programming and design professionals whose work results in the ultimate construction of a facility or the improvement of the physical environment.

As your comments are received, and as the check list sees use on actual projects I shall further elaborate on each of the five major generic work phases use presently. These are front end work (fen), programming (pgm), designing (des), constructing (con), and following up (fol).

Additions to the work phase list will be made as they are suggested and appear useful and appropriate for achieving the major uses of the check list.

In the material below the comment "(see record number xx in master pm check list)" refers to the data run entitled "Master pm check list - listed by data type, seq, action" - dated March 11, 1996.

II. Background

The pm master check list originated as a tabulation of construction activities that might be encountered in the network planning of a development, design, or construction project. As the list has been used by various practitioners items have been added, and the use of the list has been expanded. It can be used for making selective runs by:

- work phase
- csi codes
- general information
- responsibility codes
- submittal requirements
- who is responsible
- who is doing the work
- who is in charge
- who is liable
- target dates
- actual dates
- etc,

III. Format for data runs

A. Fields as of 03/11/96

1. Data type - describes the use of the record in relation to the management of the project of which it is a part.
 - a) abbreviations (abb)
Key abbreviations used for descriptive purposes - limited where possible to three characters.
 - b) action (act)
The basic name and description of what is being identified in the key fields.
 - c) participants (par)
The individuals or organizations responsible for carrying out the activities on the project. Usually participants will be designated by a specific code number as they become part of the project team.

2. Sequence # - describes the work phase by number when the action, subject or meaning occurs or is used in the project line of action.
The sequence # identifies the places in the general sequence of work in which design and construction professionals often visualize actions occurring in an improvement program.
- a) 01 - gen - general information about the project
Usually used to classify data that does not fit into other work phases (fields). An example of an important general category is the list of abbreviations shown in records 1 through 58 in the master check list.
 - b) 02 - fen - front end work
Work which must or should occur very early in any given phase of the project and usually before the main operations of the work phase begin. For instance checking land ownership to determine if the project can be built on the site is usually a front end activity that must be done as or before detailed programming or design work starts (see record number 63 in master pm check list).
 - c) 03 - pgm - program work
The program writing phase defines a step in the design process where a narrative oriented statement is prepared describing the needs and character of the proposed user operation, the requirements of the user and owner, the nature of the environment to be planned, designed and built, and the corresponding characteristics of the space that will satisfy these needs and requirements. Sometimes the program is called the brief.

Often an action item normally encountered during the program phase will have to be deferred until the design phase because adequate information is not available at the earlier program phase. For instance reciprocal easements at a site may not be totally defined until some design and possibly construction begins (see item 89 in the master check list).

- d) 04 - des - design work
The phase of work where detailed design studies and construction documents are prepared. The end product of the design work is a full set of contract documents from which the project can be built for the cost, within the time, and to the quality required by the proforma cost analysis and the project program.
 - (1) 04.01 - sch - schematic design
 - (2) 04.02 - ddv - design development
 - (3) 04.03 - pcd - preliminary construction documents
 - (4) 04.04 - fcd - final construction documents
 - (5) 04.05 - caw - construction contract award
- e) 05 - con - construction work
The process of converting a concept and its related plans and specifications into an actual physical environment in accordance with the program and the design requirements.

Usually the construction work phase can be broken in to several well defined parts of the building or environment. These might include the items listed below. Building parts are designated in the master pm check list as components and are defined in the component field or column (cmpt).

- (1) 05.01 - caw - construction contract award
- (2) 05.02 - gcr - general conditions
- (3) 05.03 - siw - site work

- (4) 05.04 - sbw - substructure work
- (5) 05.05 - ssw - superstructure work
- (6) 05.06 - esk - exterior skin work
- (7) 05.07 - irw - interior rough work
- (8) 05.08 - ifw - interior finish work
- (9) 05.09 - usy - unit systems work
- (10) 05.10 - clo - close out work
- (11) 05.11 - war - warranty work

f) 06 - fol - follow up work

A category of work that occurs as the project nears completion and occupancy, or following total completion of the project and during turnover, occupancy, and operation of the facility. This list of items is limited to very few items in the pm check list and most often are designated at close out items (clo) in the component (cmpt) column. No major list of follow up work is given in the present master check list.

- 3. Action, subject or meaning - describes what major element is being defined by the codes within the line item description (record).
- 4. CSI code - describes the master spec section in accordance with the generic spec section to which the work is assigned by the CSI and most other major information providers.
- 5. Work phase - describes the work phase as identified by number and abbreviation (similar to the sequence # above) identified in column format by x under the field and in the action record. See above under sequence # for descriptions of material.

Note: this is a redundant set of data and duplicates the data shown in the sequence # column described above. However the display is in specific column format to allow for direct searches on a given work phase. It is an alternate way of showing phase data.

- 01 - General (gen)
- 02 - Front end work (fen)
- 03 - Program (pgm)
- 04 - Design (des)
- 05 - Construction (con)
- 06 - Follow up (fol)

- 6. Work phase (wk phse) - describes the work phase as identified by abbreviation (similar to the data fields described under item 1 and 5 above).
Note: this is a redundant set of data being shown to allow several methods of searching on base data.
- 7. Component of project (cmpt) - provides supplementary information about actions, subjects or meanings
Note: some redundant data is shown in this field. Non redundant data is further detail about sub components of the record actions, subjects and meanings.

IV. Data base classifications - preliminary

A. Work phase - the phase of work in which action is taking place (x axis of matrix) - in approximate order in which the work takes place

- 1. ccv - conceive
- 2. pgm - program
- 3. apv - approve
- 4. des - design
- 5. con - construct
- 6. tov - turn over
- 7. opr - operate

8. mtn - maintain
9. war - warranty period

**B. Project component - why, where, and/or when the action is taking place
(cmpt)**

1. aba - abatement work
2. adm - administrative work
3. cde - code and ordinance work
4. clo - close out work
5. con - construction work
6. cos - cost & estimating work
7. cot - contracts work
8. cst - costing work
9. ctr - contract preparation & execution work
10. dem - demolition work
11. des - design work
12. eas - easement work
13. env - environmental work
14. esk - exterior skin work
15. fen - front end work
16. fin - finance work
17. frw - front end work
18. gcr - general conditions & requirements work
19. ifw - interior finish work
20. ins - insurance
21. irw - interior rough work
22. isp - inspection work
23. mgt - management work
24. mkt - marketing work
25. ofs - off site work
26. ons - on site work
27. pas - planning & scheduling work
28. per - permitting work
29. pgm - program work
30. pro - procurement work
31. reg - regulatory work
32. rep - reporting work
33. res - real estate work
34. sbw - substructure work
35. sit - site work
36. siw - site work
37. ssw - superstructure work
38. sub - submittal work
39. tes - testing work
40. trf - traffic related work
41. usy - unit systems work
42. utl - utility work
43. ven - value engineering
44. war - warranty work
45. zon - zoning work

C. **Discipline** - those doing the work (y axis of matrix)

1. apv - approval
2. arc - architecture
3. con - construction
4. eas - easements
5. eng - engineering
6. env - nvironmental
7. est - estimating or costing
8. fin - inancing
9. lea - easing
10. leg - legal
11. mkt - marketing
12. per - permitting
13. plg - planning
14. pma - property management
15. reg - regulator
16. res - real estate
17. sal - sales

D. **Submittal type** - the type of submittal to be provided to those in charge - note this field is not shown on the enclosed check list but should be added to the working check list for the project.

1. bos - Buy out sheets
2. ebo - Color boards
3. cut - Cuts
4. mup - Mock ups
5. sam - Samples
6. shd - Shop drawings

Master pm check list - listed by data type, seq, action

	data type	seq	action, subject or meaning	cal code	wk phase	cmpt	resp cde	01-gen	02-fen	03-pgm	04-des	05-con	06-foi
1	abb	01/	- abb - abbreviations		gen/	abb/		x					
2	abb	01/	- rsp - responsibility codes		gen/	rsp/		x					
3	abb	01/02/03/0/	- zon - Zoning work		gen/fen/pgm/	zon/		x	x	x	x		
4	abb	01/02/03/0/	- agr - agreements		gen/fen/pgm/	agr/		x	x	x	x	x	
5	abb	01/02/03/0/	- bus - business negotiations		gen/fen/pgm/	bus/		x	x	x	x	x	
6	abb	01/02/03/0/	- cde - code & ordinance work		gen/fen/pgm/	cde/		x	x	x	x	x	
7	abb	01/02/03/0/	- cmpt - component		gen/fen/des/	cmpt/		x	x	x	x	x	
8	abb	01/02/03/0/	- cos - cost & estimating work		gen/fen/pgm/	cos/		x	x	x	x	x	
9	abb	01/02/03/0/	- ctr - contract preparation and execution work		gen/fen/pgm/	ctr/		x	x	x	x	x	
10	abb	01/02/03/0/	- eas - Easement work		gen/fen/pgm/	eas/		x	x	x	x	x	
11	abb	01/02/03/0/	- fen - Front end work		gen/fen/pgm/	fen/		x	x	x	x	x	
12	abb	01/02/03/0/	- fen - front end work		gen/fen/pgm/	fen/		x	x	x	x	x	
13	abb	01/02/03/0/	- mkt - Market considerations		gen/fen/pgm/	mkt/		x	x	x	x	x	
14	abb	01/02/03/0/	- res - real estate		gen/fen/pgm/	res/		x	x	x	x	x	
15	abb	01/02/03/0/	- vac - vacation of buildings or land		gen/fen/pgm/	vac/		x	x	x		x	
16	abb	01/02/03/0/	- zon - zoning		gen/fen/pgm/	zon/		x	x	x	x	x	
17	abb	01/03/04/	- pde - preliminary design		gen/pgm/des/	pde/		x		x	x		
18	abb	01/03/04/0/	- adm -administration		gen/pgm/des/	adm/		x		x	x	x	
19	abb	01/03/04/0/	- apv - approval		gen/pgm/des/	apv/		x		x	x	x	
20	abb	01/03/04/0/	- cot - contracts		gen/pgm/des/	cot/		x		x	x	x	
21	abb	01/03/04/0/	- cst - costing		gen/pgm/des/	cst/		x		x	x	x	
22	abb	01/03/04/0/	- eas - easements		gen/pgm/des/	eas/		x		x	x	x	
23	abb	01/03/04/0/	- fin - finance		gen/pgm/des/	fin/		x		x	x	x	
24	abb	01/03/04/0/	- mgt - management		gen/pgm/des/	mgt/		x		x	x	x	
25	abb	01/03/04/0/	- pas - planning & scheduling		gen/pgm/des/	pas/		x		x	x	x	
26	abb	01/03/04/0/	- per - permits		gen/pgm/des/	per/		x		x	x	x	
27	abb	01/03/04/0/	- reg - regulatory		gen/pgm/des/	reg/		x		x	x	x	
28	abb	01/03/04/0/	- reg - Regulatory work		gen/pgm/des/	reg/		x		x	x	x	
29	abb	01/04	- dde - design development		gen/des/	dde/		x			x		
30	abb	01/04/	- des - Design work		gen/des/	des/		x			x		
31	abb	01/04/	- des - design		gen/des/	des/		x			x		
32	abb	01/04/	- prg - project design program work		gen/des/	prg/		x			x		
33	abb	01/04/	- sde - schematic design		gen/des/	sde/		x			x		
34	abb	01/04/05/	- cod - contract documents		gen/des/con/	cod/		x			x	x	
35	abb	01/04/05/	- gcr - general conditions & requirements		gen/des/con/	gcr/		x			x	x	

Master pm check list - listed by data type, seq, action

	data type	seq	action, subject or meaning	cal code	wk phase	cmpt	resp cde	01-	02-	03-	04-	05-	06-
								gen	fen	pgm	des	con	fol
36	abb	01/04/05/	- mkp - mock up		gen/des/con/	mkp/		x			x	x	
37	abb	01/05/	- occu - curb cut		gen/con/	occu/		x				x	
38	abb	01/05/	- clo - close out		gen/con/	clo/		x				x	
39	abb	01/05/	- con - construction		gen/con/	con/		x				x	
40	abb	01/05/	- csq - construction sequence		gen/con/	csq/		x				x	
41	abb	01/05/	- dem - demolition work		gen/con/	dem/		x				x	
42	abb	01/05/	- dem - Demolition work		gen/con/	dem/		x				x	
43	abb	01/05/	- esk - Exterior skin work		gen/con/	esk/		x				x	
44	abb	01/05/	- esk - exterior skin work		gen/con/	esk/		x				x	
45	abb	01/05/	- ifw - Interior finish work		gen/con/	ifw/		x				x	
46	abb	01/05/	- irw - interior rough work		gen/con/	irw/		x				x	
47	abb	01/05/	- irw - Interior rough work		gen/con/	irw/		x				x	
48	abb	01/05/	- ofs - off site work		gen/con/	ofs/		x				x	
49	abb	01/05/	- ons - on site work		gen/con/	ons/		x				x	
50	abb	01/05/	- pro - procurement		gen/con/	pro/		x				x	
51	abb	01/05/	- pro - Procurement work		gen/con/	pro/		x				x	
52	abb	01/05/	- sbw - substructure work		gen/con/	sbw/		x				x	
53	abb	01/05/	- sbw - Substructure work		gen/con/	sbw/		x				x	
54	abb	01/05/	- siw - Site work		gen/con/	siw/		x				x	
55	abb	01/05/	- siw - site work		gen/con/	siw/		x				x	
56	abb	01/05/	- ssw - Super structure work		gen/con/	ssw/		x				x	
57	abb	01/05/	- usy - Unit systems work		gen/con/	usy/		x				x	
58	abb	04/05/	- per - Permit work		des/con/	per/					x	x	
59	act	02/03/04/05/	Obtain permanent & interim financing information as required		fen/pgm/des/con/	fen/fen/pgm/des/con/		x	x	x	x	x	
60	act	02/03/04/	Prepare and submit market absorption rate studies		fen/pgm/des/	fen/pgm/des/fin/		x	x	x			
61	act	02/03/04/	Acquire control of property		fen/pgm/des/	fen/res/pgm/des/		x	x	x			
62	act	02/03/04/	Check and clear all assessments against the property		fen/pgm/des/	fen/res/des/pgm/		x	x	x			
63	act	02/03/04/	Check land ownership to determine if project can be built on site		fen/pgm/des/	res/pgm/fen/des/		x	x	x			
64	act	02/03/04/	Locate sites		fen/pgm/des/	fen/res/pgm/des/		x	x	x			
65	act	02/03/04/	Prepare ALTA/ACSM land title survey		fen/pgm/des/	fen/res/des/pgm/		x	x	x			
66	act	02/03/04/	Prepare market studies		fen/pgm/des/	pgm/fen/des/		x	x	x			
67	act	02/03/04/	Prepare pro forma cost analyses		fen/pgm/des/	coe/fin/fen/pgm/des/		x	x	x			
68	act	02/03/04/	Resolve property use restrictions		fen/pgm/des/	fen/pgm/des/fin/		x	x	x			
69	act	02/03/04/	Review & approve environmental impact statements	001	fen/pgm/des/	fen/pgm/des/fin/eg/		x	x	x			
70	act	02/03/04/	Rezone properties as required		fen/pgm/des/	fen/pgm/des/fin/eg/zon/		x	x	x			

Master pm check list - listed by data type, seq, action

	data type	seq	action, subject or meaning	cal code	wk phase	cmpt	resp cde	01-gen	02-fen	03-pgm	04-des	05-con	06-foi
71	act	02/03/04/	Select construction advisors or consultants as reqd		fen/pgm/des/	fen/des/pgm/			x	x	x		
72	act	02/03/04/	Select design architect		fen/pgm/des/	fen/pgm/des/			x	x	x		
73	act	02/03/04/	Select electrical engineer		fen/pgm/des/	fen/pgm/des/			x	x	x		
74	act	02/03/04/	Select mechanical engineer		fen/pgm/des/	fen/pgm/des/			x	x	x		
75	act	02/03/04/	Select production architect		fen/pgm/des/	fen/pgm/des/			x	x	x		
76	act	02/03/04/	Select site engineer		fen/pgm/des/	fen/pgm/des/			x	x	x		
77	act	02/03/04/	Select structural engineer		fen/pgm/des/	fen/pgm/des/			x	x	x		
78	act	02/03/04/	Select traffic consultant		fen/pgm/des/	fen/pgm/des/			x	x	x		
79	act	02/03/04/0/	Apply for & obtain environmental permits required	001/	fen/pgm/des/	fen/pgm/des/	on/env/per/		x	x	x	x	
80	act	02/03/04/0/	Obtain permits from Corps of Engineers as required		fen/pgm/des/	fen/pgm/des/	on/per/		x	x	x	x	
81	act	02/03/04/0/	Prepare & submit environmental impact statement	001/	fen/pgm/des/	fen/pgm/reg/e	nv/des/con/		x	x	x	x	
82	act	02/03/04/0/	Prepare and submit traffic studies of site area		fen/pgm/des/	fen/pgm/tr/si	des/con/		x	x	x	x	
83	act	02/03/04/0/	Review & approve environmental impact statement	001/	fen/pgm/des/	fen/reg/env/d	es/con/pgm/		x	x	x	x	
84	act	02/03/04/0/	Apply for & obtain waterway work permits		fen/pgm/des/	fen/pgm/des/	on/per/		x	x	x	x	
85	act	02/03/04/0/	Apply for regulatory agency approvals		fen/pgm/des/	fen/pgm/des/	on/		x	x	x	x	
86	act	02/03/04/0/	Check all assements and resolve outstanding liability commitments		fen/pgm/des/	fen/res/pgm/d	es/con/		x	x	x	x	
87	act	02/03/04/0/	Decide on and describe all private easements at site		fen/pgm/des/	ees/ten/pgm/	es/con/		x	x	x	x	
88	act	02/03/04/0/	Decide on and describe all public utility easements at site		fen/pgm/des/	ees/ten/pgm/	es/con/		x	x	x	x	
89	act	02/03/04/0/	Decide on and describe all reciprocal access easements at site		fen/pgm/des/	ees/ten/pgm/	es/con/		x	x	x	x	
90	act	02/03/04/0/	Decide on and describe all semi public utility easements at site		fen/pgm/des/	ees/ten/pgm/	es/con/		x	x	x	x	
91	act	02/03/04/0/	Decide on project delivery system to be used		fen/pgm/des/	fen/pgm/des/	on/mgt/		x	x	x	x	
92	act	02/03/04/0/	Determine financial soundness of client		fen/pgm/des/	fen/pgm/fin/d	s/con/		x	x	x	x	
93	act	02/03/04/0/	Identify project ultimate decision makers		fen/pgm/des/	fen/mgt/pgm/	es/con/		x	x	x	x	
94	act	02/03/04/0/	Identify relations among parties		fen/pgm/des/	fen/pgm/des/	on/mgt/		x	x	x	x	
95	act	02/03/04/0/	Identify ultimate decision maker		fen/pgm/des/	fen/pgm/des/	on/mgt/		x	x	x	x	
96	act	02/03/04/0/	Insure internal staff wage agreements are in place		fen/pgm/des/	fen/pgm/des/	on/adm/		x	x	x	x	
97	act	02/03/04/0/	Negotiate and execute all private easements at site		fen/pgm/des/	ees/ten/pgm/	es/con/		x	x	x	x	
98	act	02/03/04/0/	Negotiate and execute all public utility easements at site		fen/pgm/des/	ees/ten/pgm/	es/con/		x	x	x	x	
99	act	02/03/04/0/	Negotiate and execute all reciprocal access easements at site		fen/pgm/des/	ees/ten/pgm/	es/con/		x	x	x	x	
100	act	02/03/04/0/	Negotiate and execute all semi public easements at site		fen/pgm/des/	ees/ten/pgm/	es/con/		x	x	x	x	
101	act	02/03/04/0/	Obtain interim financing		fen/pgm/des/	fen/pgm/fin/d	s/con/		x	x	x	x	
102	act	02/03/04/0/	Obtain or prepare all easements for street relocation		fen/pgm/des/	fen/reg/eas/d	es/con/pgm/		x	x	x	x	
103	act	02/03/04/0/	Obtain site topographic, boundary & utility surveys		fen/pgm/des/	fen/pgm/des/	on/		x	x	x	x	
104	act	02/03/04/0/	Obtain temporary & permanent financing		fen/pgm/des/	fen/pgm/fin/d	s/con/		x	x	x	x	
105	act	02/03/04/0/	Prepare & obtain all street relocation easements		fen/pgm/des/	ees/ten/pgm/	es/con/		x	x	x	x	

Master pm check list - listed by data type, seq, action

	data type	seq	action, subject or meaning	csi code	wk phase	cmpl	resp cde	01-	02-	03-	04-	05-	06-
								gen	fen	pgm	des	con	fol
108	act	02/03/04/05	Prepare & submit environmental impact statements		fen/pgm/des/orv	fen/env/pgm/es/conv		x	x	x	x	x	
107	act	02/03/04/05	Prepare and obtain required easements		fen/pgm/des/orv	eas/fen/pgm/es/conv		x	x	x	x		
108	act	02/03/04/05	Revalidate your firm's ability to do job		fen/pgm/des/orv	fen/pgm/des/orv/mgt/		x	x	x	x		
109	act	02/03/04/05	Select geotechnical engineer		fen/pgm/des/orv	fen/pgm/des/orv		x	x	x	x		
110	act	02/03/04/05	Set project delivery system to be used		fen/pgm/des/orv	fen/des/con/p gm		x	x	x	x		
111	act	02/03/04/05	Set project mission, goals & objectives		fen/pgm/des/orv	fen/pgm/des/orv/mgt/		x	x	x	x		
112	act	02/04/	Apply for and obtain site plan approval		fen/des/	fen/sit/des/		x		x			
113	act	02/04/05	Apply for permanent utility services	001	fen/des/con/	fen/ut/des/co rv		x		x	x		
114	act	02/04/05	Apply for temporary utility services	001/	fen/des/con/	fen/des/uti/co rv		x		x	x		
115	act	02/04/05	Arrange for and make video & sound records		fen/des/con/	fen/des/con/		x		x	x		
116	act	02/04/05	Determine site access requirements during construction	001/	fen/des/con/	fen/gcr/si/des/con		x		x	x		
117	act	02/04/05	Execute construction contracts with clients	001/	fen/des/con/	fen/ctr/des/co rv		x		x	x		
118	act	02/04/05	Identify nature of labor force for project		fen/des/con/	fen/des/con/		x		x	x		
119	act	02/04/05	Identify relations among parties during construction		fen/des/con/	fen/mgt/des/c on/		x		x	x		
120	act	02/04/05	Make preconstruction site reconnaissance - photo, sound, tv	001/	fen/des/con/	fen/des/con/s v		x		x	x		
121	act	02/04/05	Obtain highway permits for road improvements	001/	fen/des/con/	fen/con/per/d es/		x		x	x		
122	act	02/04/05	Obtain soil borings and subsoil analyses	002/	fen/des/con/	fen/des/con/s bw/		x		x	x		
123	act	02/04/05	Review applicable lien laws & convey information to those concerned	001/	fen/des/con/	fen/adm/des/co rv		x		x	x		
124	act	02/04/05/	Determine applicable utility easements & confirm clearance to start work	001/	fen/des/con/	fen/eas/des/c on/		x		x	x		
125	act	02/04/05/	Establish and tabulate key project dates, and review with project team	001/	fen/des/con/	fen/des/con/		x		x	x		
126	act	02/04/05/	Establish plan room procedures for project	001/	fen/des/con/	fen/des/con/		x		x	x		
127	act	02/04/05/	Identify easments & restrictions that impact on field work		fen/des/con/	eas/fen/des/c on/		x		x	x		
128	act	02/04/05/	Make full review of construction drawings		fen/des/con/	fen/des/con/		x		x	x		
129	act	02/04/05/	Make video tape reconaissance of site before starting design & construction	001/	fen/des/con/	fen/des/con/g cr/		x		x	x		
130	act	02/04/05/	Obtain notice to proceed if appropriate	001/	fen/des/con/	fen/adm/des/co rv		x		x	x		
131	act	02/04/05/	Prepare & submit approval procedures to be used		fen/des/con/	fen/des/con/		x		x	x		
132	act	02/04/05/	Prepare list of allowances and review with project staff	001/	fen/des/con/	fen/des/con/		x		x	x		
133	act	02/04/05/	Read construction specifications and contracts	001/	fen/des/con/	fen/mgt/des/c on/		x		x	x		
134	act	02/04/05/	Set procedures for all job related meetings		fen/des/con/	fen/des/con/m gt/		x		x	x		
135	act	02/04/05/	Validate your firm's ability to meet insurance requirements	001/	fen/des/con/	fen/ins/des/co rv/adm/		x		x	x		
136	act	02/05/	Arrange for & take ongoing construction photos	001	fen/con/	fen/con/adm/		x			x		
137	act	02/05/	Assemble and organize project construction team		fen/con/	fen/mgt/con/		x			x		
138	act	02/05/	Determine scope & nature of labor agreements & discuss with proj team	001/	fen/con/	fen/adm/con/		x			x		
139	act	02/05/	Identify all general requirement & condition items	001/	fen/con/	fen/con/gcr/		x			x		
140	act	02/05/	Inspect job site before mobilize & move in	002/	fen/con/	fen/con/		x			x		

Master pm check list - listed by data type, seq. action

	data type	seq	action, subject or meaning	csi code	wk phase	cmpt	resp cde	01-gen	02-fen	03-pgm	04-des	05-con	06-fol
141	act	02/05/	Install job site phones	001/	fen/con/	fen/con/gcr/			x			x	
142	act	02/05/	Install job site temporary toilets	001/	fen/con/	fen/con/uti/			x			x	
143	act	02/05/	Install job site temporary water	001/	fen/con/	fen/con/sit/gc/			x			x	
144	act	02/05/	Notify field staff and others concerned re alternates selected	001/	fen/con/	fen/adm/con/			x			x	
145	act	02/05/	Obtain all site clearances needed to begin and maintain construction work	002/	fen/con/	fen/con/			x			x	
146	act	02/05/	Obtain bonds, insurance & licenses as required	001/	fen/con/	fen/con/adm/			x			x	
147	act	02/05/	Obtain builder's risk and liability insurance	001/	fen/con/	fen/adm/con/ns/			x			x	
148	act	02/05/	Obtain emergency phone numbers for subcontractors	001/	fen/con/	fen/adm/con/			x			x	
149	act	02/05/	Obtain field office phones and distribute number	001/	fen/con/	fen/adm/con/			x			x	
150	act	02/05/	Obtain fire and theft insurance	001/	fen/con/	fen/adm/con/ns/			x			x	
151	act	02/05/	Obtain subcontractor insurance certificates	001/	fen/con/	fen/adm/con/ns/			x			x	
152	act	02/05/	Prepare & distribute buy-out estimate as required	001/	fen/con/	con/fen/pro/			x			x	
153	act	02/05/	Prepare & distribute construction job site plan	001/	fen/con/	fen/adm/sit/gcr/con/			x			x	
154	act	02/05/	Prepare and distribute subcontractor list	001/	fen/con/	fen/con/			x			x	
155	act	02/05/	Prepare blanket purchase order system	001/	fen/con/	adm/fen/de/cn/			x			x	
156	act	02/05/	Prepare master labor & material budgets	001/	fen/con/	con/fen/coo/			x			x	
157	act	02/05/	Prepare schedule of values for payment requests	001/	fen/con/	fen/adm/con/			x			x	
158	act	02/05/	Provide const supt with subcontract purchase orders showing work scope of subcontracts	001/	fen/con/	fen/coo/adm/cor/			x			x	
159	act	02/05/	Provide notice of start of work as required	001/	fen/con/	fen/con/			x			x	
160	act	02/05/	Provide owner with insurance certificates as required	001/	fen/con/	fen/adm/con/ns/			x			x	
161	act	02/05/	Review billing procedures with subcontractors	001/	fen/con/	fen/adm/con/			x			x	
162	act	02/05/	Review bulletin, change order & field order procedures with subcontractors	001/	fen/con/	fen/adm/con/			x			x	
163	act	02/05/	Review employee site conduct guidelines with internal staff	001/	fen/con/	fen/con/adm/			x			x	
164	act	02/05/	Review employee site conduct guidelines with subcontractors	001/	fen/con/	fen/adm/con/			x			x	
165	act	02/05/	Review site plan and site space allocation with subcontractors	001/	fen/con/	fen/con/sit/gc/			x			x	
166	act	02/05/	Set & hook up job site clothes changing facilities for trades	001/	fen/con/	fen/con/			x			x	
167	act	02/05/	Set & hook up job site offices	001/	fen/con/	fen/con/gcr/			x			x	
168	act	02/05/	Set & hook up job site storage facilities	001/	fen/con/	fen/con/gcr/			x			x	
169	act	02/05/	Set & implement safety program	001/	fen/con/	fen/adm/con/eg/			x			x	
170	act	02/05/	Set up field bank accounts as needed	001/	fen/con/	fen/con/adm/			x			x	
171	act	03/04/	Check parking requirements		pgm/des/	ode/pgm/des/				x	x		
172	act	03/04/	Determine electrical demand loads	016/	pgm/des/	pgm/des/uti/				x	x		
173	act	03/04/	Determine elevator requirements		pgm/des/	pgm/des/				x	x		
174	act	03/04/	Determine gas demand loads	015/	pgm/des/	pgm/des/uti/				x	x		
175	act	03/04/	Determine phone demand loads	016/	pgm/des/	pgm/des/uti/				x	x		

Master pm check list - listed by data type, seq, action

	data type	seq	action, subject or meaning	csi code	wk phse	cmpt	resp cde	01-gen	02-fen	03-pgm	04-des	05-con	06-foi
176	act	03/04/	Determine scope of work for all off site construction required	002/	pgm/des/	pgm/des/				x	x		
177	act	03/04/	Make prelim code review of early design packages		pgm/des/	cde/pgm/des/				x	x		
178	act	03/04/	Negotiate and execute construction advisor contracts as reqd		pgm/des/	ctr/pgm/des/				x	x		
179	act	03/04/	Obtain variances to land use ordinances as required		pgm/des/	res/reg/pgm/des/				x	x		
180	act	03/04/	Prepare project program		pgm/des/	pgm/des/				x	x		
181	act	03/04/	Review and approve project program		pgm/des/	pgm/des/				x	x		
182	act	03/04/	Review project program needs and desires with architect/engineer		pgm/des/	pgm/des/				x	x		
183	act	03/04/	Review project program needs and desires with owner		pgm/des/	pgm/des/				x	x		
184	act	03/04/	Select construction design characteristics & systems		pgm/des/	pgm/des/				x	x		
185	act	03/04/	Write facility program		pgm/des/	pgm/des/				x	x		
186	act	03/04/05/	Establish scope of off-site work required by you and by others		pgm/des/corv	pgm/des/corv/ofs/siw/				x	x	x	
187	act	03/04/05/	Identify long lead or hard to procure items and discuss with project staff		pgm/des/corv	pgm/des/corv/pro/				x	x	x	
188	act	03/04/05/	Obtain copies of applicable codes and ordinances		pgm/des/corv	pgm/des/corv/				x	x	x	
189	act	03/04/05/	Obtain permanent financing		pgm/des/corv	fin/des/corv/pgm/				x	x	x	
190	act	03/04/05/	Prepare & submit value engineering analysis	001/	pgm/des/corv	pgm/des/corv/ven/				x	x	x	
191	act	03/04/05/	Prepare and distribute project organization chart		pgm/des/corv	pgm/des/corv/adm/				x	x	x	
192	act	03/04/05/	Remove contaminants from site as required	001/	pgm/des/corv	reg/pgm/des/aba/corv/				x	x	x	
193	act	03/04/05/	Review all exotic materials to be used with project staff		pgm/des/corv	pgm/des/corv/				x	x	x	
194	act	03/04/05/	Review client contract	001	pgm/des/corv	adm/corv/des/corv/pgm/				x	x	x	
195	act	04/	Apply for & obtain plan code reviews required	001	des/	cde/des/					x		
196	act	04/	Certify gross building areas	001	des/	des/					x		
197	act	04/	Check design development package for constructibility		des/	des/					x		
198	act	04/	Check preliminary design package for constructibility		des/	des/					x		
199	act	04/	Check schematic design package for constructibility		des/	des/					x		
200	act	04/	Confirm owner or end user time table for design	001	des/	des/pas					x		
201	act	04/	Develop surrounding road improvement plans with city		des/	des/sit/					x		
202	act	04/	Develop surrounding road improvement plans with XDOT		des/	des/sit/					x		
203	act	04/	Execute design architectural contract		des/	ctr/des/					x		
204	act	04/	Execute elect engineer contract		des/	ctr/des/					x		
205	act	04/	Execute mechanical engineer contract		des/	ctr/des/					x		
206	act	04/	Execute production architect contract		des/	ctr/des/					x		
207	act	04/	Execute site engineer contract		des/	ctr/des/					x		
208	act	04/	Execute structural engineer contract		des/	ctr/des/					x		
209	act	04/	Execute traffic engineer contract		des/	ctr/des/					x		
210	act	04/	Make code searches for document compliance		des/	des/					x		

Master pm check list - listed by data type, seq, action

	data type	seq	action, subject or meaning	cal code	wk phase	cmpt	resp cde	01-gen	02-fen	03-pgm	04-des	05-con	06-foi
211	act	04/	Obtain variances to building codes as required		des/	cde/des/					x		
212	act	04/	Prepare & issue contract document package		des/	des/					x		
213	act	04/	Prepare & issue design development package		des/	des/					x		
214	act	04/	Prepare & issue elevator entrance and cab design	014/	des/	des/					x		
215	act	04/	Prepare & issue preliminary design package		des/	des/					x		
216	act	04/	Prepare & issue schematic design package		des/	des/					x		
217	act	04/	Prepare & submit performance specs for life safety and automation systems		des/	des/					x		
218	act	04/	Prepare and submit early design studies to city for comment		des/	des/cde/					x		
219	act	04/	Prepare and submit early design studies to XDOT for comment		des/	des/sk/					x		
220	act	04/	Prepare design development package		des/	des/					x		
221	act	04/	Prepare final construction documents	001/	des/	des/					x		
222	act	04/	Prepare preliminary design package		des/	des/					x		
223	act	04/	Prepare schematic design package		des/	des/					x		
224	act	04/	Retain elevator consultant		des/	des/cot/					x		
225	act	04/	Retain life safety & automation consultant		des/	des/cot/					x		
226	act	04/	Retain window washing consultant		des	des/cot/					x		
227	act	04/	Review & approve contract document package	001	des/	des/					x		
228	act	04/	Review & approve design development package		des/	des/					x		
229	act	04/	Review & approve preliminary design package		des/	des/					x		
230	act	04/	Review & approve schematic design package		des/	des/					x		
231	act	04/05/	Apply for & obtain curb cut permits	002/	des/corv/	des/corv/per/					x	x	
232	act	04/05/	Apply for & obtain demolition permits	002/	des/corv/	des/corv/per/					x	x	
233	act	04/05/	Apply for & obtain electrical permits	016/	des/corv/	des/corv/per/					x	x	
234	act	04/05/	Apply for & obtain erosion control permits	002/	des/corv/	des/corv/env/er/					x	x	
235	act	04/05/	Apply for & obtain food service permits	001/	des/corv/	des/corv/per/					x	x	
236	act	04/05/	Apply for & obtain foundation permits	001/	des/corv/	des/corv/per/					x	x	
237	act	04/05/	Apply for & obtain full building permit	001/	des/corv/	des/corv/per/					x	x	
238	act	04/05/	Apply for & obtain health department permits	001/	des/corv/	des/corv/per/					x	x	
239	act	04/05/	Apply for & obtain highway right of way work permits	001/	des/corv/	des/corv/per/					x	x	
240	act	04/05/	Apply for & obtain mechanical permits	015/	des/corv/	des/corv/per/					x	x	
241	act	04/05/	Apply for & obtain site improvement permit	001/	des/corv/	des/corv/per/					x	x	
242	act	04/05/	Apply for & obtain site utility permit	002/	des/corv/	des/corv/per/					x	x	
243	act	04/05/	Apply for & obtain site work permits	002/	des/corv/	des/corv/per/					x	x	
244	act	04/05/	Apply for & obtain soil erosion permits	002/	des/corv/	des/corv/per/					x	x	
245	act	04/05/	Apply for & obtain street restriction permits	001/	des/corv/	des/corv/per/					x	x	

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	data type	seq	action, subject or meaning	cel code	wk phase	cmpt	resp cde	01-gen	02-fen	03-pgm	04-des	05-con	06-foi
246	act	04/05/	Apply for and obtain all sign permits	001/	des/con/	des/con/per/					x	x	
247	act	04/05/	Bind edges of frequently used sets of drawings		des/con/	des/con/					x	x	
248	act	04/05/	Check final design package for constructibility	001/	des/con/	des/con/					x	x	
249	act	04/05/	Confirm owner or end user time table for construction & occupancy	001/	des/con/	des/con/					x	x	
250	act	04/05/	Confirm owner's budget relative to the project delivery system selected	001/	des/con/	cos/des/con/					x	x	
251	act	04/05/	Define job conditions to be met for obtaining certificate of occupancy	001/	des/con/	des/con/clo/					x	x	
252	act	04/05/	Define job conditions to be met for substantial completion	001/	des/con/	des/clo/con/					x	x	
253	act	04/05/	Design, fabricate and erect site identification sign	001/	des/con/	des/con/gr/					x	x	
254	act	04/05/	Design, submit and approve concrete mixes	003/	des/con/	des/con/pro/					x	x	
255	act	04/05/	Determine location of storage, offices, const roads, stockpile, parking, trailers, & fab areas	002/	des/con/	des/con/gr/s/v					x	x	
256	act	04/05/	Determine maintenance easements and confirm clearance to start work	001/	des/con/	eas/des/con/					x	x	
257	act	04/05/	Determine mock ups required and make arrangements for their design & const	001/	des/con/	des/con/pro/n up/					x	x	
258	act	04/05/	Determine reciprocal easements & confirm clearance to start work		des/con/	eas/des/con/					x	x	
259	act	04/05/	Determine restricted load requirements on site access roads	001/	des/con/	des/con/					x	x	
260	act	04/05/	Determine warehousing needs and obtain space	001/	des/con/	des/con/pro/					x	x	
261	act	04/05/	Establish & implement procedures for keeping field logs, diaries & reports	001/	des/con/	des/con					x	x	
262	act	04/05/	Establish & publish construction record set preparation procedures	001/	des/con/	des/con/clo/					x	x	
263	act	04/05/	Establish & publish operating & maint manual (OMM) submittal procedures	001/	des/con/	des/clo/con/					x	x	
264	act	04/05/	Establish & publish submittal processing procedures	001/	des/con/	des/con/					x	x	
265	act	04/05/	Establish and implement project meeting note procedure	001/	des/con/	des/con/					x	x	
266	act	04/05/	Establish and publish punch list procedures	001/	des/con/	des/con/clo/					x	x	
267	act	04/05/	Establish and publish warranty procedures	001/	des/con/	des/clo/war/c on/					x	x	
268	act	04/05/	Establish format and content of procurement logs	001/	des/con/	des/con/pro/					x	x	
269	act	04/05/	Establish level of documentation to be maintained on project		des/con/	des/con/					x	x	
270	act	04/05/	Establish photo taking responsibilities and procedures on project	001/	des/con/	des/con/					x	x	
271	act	04/05/	Establish request for payment, approval & payment procedures	001/	des/con/	des/con/					x	x	
272	act	04/05/	Estimate costs of revisions to work	001/	des/con/	cos/des/con/					x	x	
273	act	04/05/	Evaluate elevator proposals and award contract	014/	des/con/	des/con/pro/c ot/					x	x	
274	act	04/05/	Execute client design contract		des/con/	des/con/					x	x	
275	act	04/05/	Execute client letter of intent if appropriate		des/con/	des/con/					x	x	
276	act	04/05/	Execute geotechnical engineer contract		des/con/	ctr/des/con/					x	x	
277	act	04/05/	File bid set of contract documents in safe, protected location	001/	des/con/	adm/des/con/					x	x	
278	act	04/05/	File contract document building permit set in safe, protected location	001/	des/con/	des/con/per/					x	x	
279	act	04/05/	Follow up and obtain regulatory approvals	001/	des/con/	reg/des/con/					x	x	
280	act	04/05/	Follow up and receive temporary utility services	001/	des/con/	des/con/pro/ ut/					x	x	

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data type	seq	action, subject or meaning	cal code	wk phase	cmpt	resp cde	01-gen	02-fen	03-pgm	04-des	05-con	06-foi
281	act	04/05/ Follow up with public relations call after const	001/	des/con/	mkt/des/con/							
282	act	04/05/ Identify all allowance items & distribute list to those concerned	001/	des/con/	des/con/					x	x	
283	act	04/05/ Identify all owner furnished equipment items & distribute to those concerned	001/	des/con/	des/con/pro/					x	x	
284	act	04/05/ Identify equip & material furnished by others & review with proj staff	001/	des/con/	con/pro/des/					x	x	
285	act	04/05/ Insure that all drawing deposits are returned	001/	des/con/	adm/des/con/					x	x	
286	act	04/05/ Label & safely store intact bid set of contract documents	001/	des/con/	des/con/					x	x	
287	act	04/05/ Label & safely store intact permit sets of drawings	001/	des/con/	des/con/per/					x	x	
288	act	04/05/ Negotiate & execute agreement on traffic signalization		des/con/	ctr/des/con/					x	x	
289	act	04/05/ Negotiate and execute design/build contracts as required		des/con/	ctr/des/con/					x	x	
290	act	04/05/ Negotiate and execute guaranteed maximum prices as required		des/con/	ctr/des/con/					x	x	
291	act	04/05/ Obtain & distribute approved long lead item color & finish schedules	001/	des/con/	des/con/pro/					x	x	
292	act	04/05/ Obtain curb cut permits	001/	des/con/	des/con/per/					x	x	
293	act	04/05/ Obtain delivery dates for material & equipment furnished by others	001/	des/con/	des/con/pro/					x	x	
294	act	04/05/ Obtain electrical permit	001/016/	des/con/	des/con/per/					x	x	
295	act	04/05/ Obtain foundation permits	001/	des/con/	des/con/per/					x	x	
296	act	04/05/ Obtain full building permit	001/	des/con/	des/con/per/					x	x	
297	act	04/05/ Obtain information on baler	013/	des/con/	des/con/usy/					x	x	
298	act	04/05/ Obtain information on pallet stacker	013/	des/con/	des/con/usy/					x	x	
299	act	04/05/ Obtain information on trash compactor	013/	des/con/	des/con/usy/					x	x	
300	act	04/05/ Obtain plumbing permit	001/015/	des/con/	des/con/per/					x	x	
301	act	04/05/ Obtain required approvals of work plans and schedules	001/	des/con/	des/con/pas/					x	x	
302	act	04/05/ Obtain site work permits	001/002/	des/con/	des/con/per/si/					x	x	
303	act	04/05/ Package const documents for soliciting sub proposals		des/con/	des/con/					x	x	
304	act	04/05/ Prepare & distribute project directory	001/	des/con/	adm/des/con/					x	x	
305	act	04/05/ Prepare & execute all license agreements	001/	des/con/	ctr/des/con/					x	x	
306	act	04/05/ Prepare & issue elevator fixture design, materials & colors	014/	des/con/	des/con/					x	x	
307	act	04/05/ Prepare & review requests for payment with client's representative	001/	des/con/	adm/des/con/					x	x	
308	act	04/05/ Prepare & submit client proposals		des/con/	des/con/					x	x	
309	act	04/05/ Prepare & submit daily reports	001/	des/con/	des/con/					x	x	
310	act	04/05/ Prepare & submit elevator studies		des/con/	des/con/pro/					x	x	
311	act	04/05/ Prepare and distribute code of accounts	001/	des/con/	adm/des/con/					x	x	
312	act	04/05/ Prepare and publish as appropriate, full project critique & debriefing	001/	des/con/	cto/des/con/					x	x	
313	act	04/05/ Prepare base cost estimates to correlate with design program	001/	des/con/	cos/des/con/					x	x	
314	act	04/05/ Prepare bidder's lists	001/	des/con/	des/con/					x	x	
315	act	04/05/ Prepare contract award tabulation sheet where appropriate	001/	des/con/	des/con/					x	x	

Master pm check list - listed by data type, seq, action

	data type	seq	action, subject or meaning	cal code	wk phase	cmpt	resp cde	01-gen	02-fen	03-pgm	04-des	05-con	06-foi
316	act	04/05/	Prepare contract document matrix	001/	des/con/	des/con/					x	x	
317	act	04/05/	Prepare subcontractor selection criteria	001/	des/con/	des/con/					x	x	
318	act	04/05/	Prepare summary & detailed network models of work to be done	001/	des/con/	des/con/pas/					x	x	
319	act	04/05/	Process client & sub contractor change orders	001/	des/con/	adm/des/con/					x	x	
320	act	04/05/	Prepare & issue elevator proposal package	014/	des/con/	des/con/pro/					x	x	
321	act	04/05/	Provide field staff with job log books and set procedures for entries	001/	des/con/	adm/des/con/					x	x	
322	act	04/05/	Provide field staff with up to date contract drawing set	001/	des/con/	adm/des/con/					x	x	
323	act	04/05/	Retain curtain wall/testing consultant		des/con/	tes/des/con/p ro/					x	x	
324	act	04/05/	Retain engineering survey services required	001/	des/con/	des/con/					x	x	
325	act	04/05/	Review & distribute all subsoil reports as required		des/con/	des/con/					x	x	
326	act	04/05/	Review testing needs and obtain testing services	001/	des/con/	des/con/tes/p ro/					x	x	
327	act	04/05/	Review work plan and schedules with subcontractors	001/	des/con/	des/con/pas/					x	x	
328	act	04/05/	Set & implement client review procedures	001/	des/con/	adm/des/con/					x	x	
329	act	04/05/	Set field project filing system	001/	des/con/	adm/con/des/					x	x	
330	act	04/05/	Set format for project document files		des/con/	des/con/					x	x	
331	act	04/05/	Set job meeting schedules	001/	des/con/	des/con/					x	x	
332	act	04/05/	Set normal, expedited and special submittal turnaround times to be used	001/	des/con/	des/con/pro/					x	x	
333	act	04/05/	Set office project filing system	001/	des/con/	adm/con/des/					x	x	
334	act	04/05/	Set procedures for submission of daily, weekly, and monthly reports	001/	des/con/	adm/des/con/					x	x	
335	act	04/05/	Set storage & insurance reqmts for material & equip furnished by others	001/	des/con/	adm/des/con/ gct/					x	x	
336	act	04/05/	Set up required courier service for local delivery of critical material	001/	des/con/	adm/con/des/					x	x	
337	act	04/05/	Tabulate accepted alternates & insure applicable drawings are available		des/con/	des/con/					x	x	
338	act	04/05/	Tabulate all bid qualifications & review with project staff		des/con/	des/con/					x	x	
339	act	05/	Account for all client-owned tools, spare parts, and extra stocks of materials	001/	con/	clt/con/						x	
340	act	05/	Advise owner of any insurance changes over existing or past requirements or dates.	001/	con/	clt/con/						x	
341	act	05/	Align & weld exterior precast panels	003/005/	con/	con/ssw/						x	
342	act	05/	Apply concrete floor sealer	003/	con/	con/ftw/						x	
343	act	05/	Apply concrete floor sealer	003/	con/	con/ftw/						x	
344	act	05/	Apply exterior insulation and finish systems (dryvit and others)	007/	con/	esk/con/						x	
345	act	05/	Apply for & obtain temporary parking permits	001/	con/	con/per/						x	
346	act	05/	Apply gypsum floor topping	003/	con/	con/ftw/						x	
347	act	05/	Apply plaster brown and scratch coat to interior walls	009/	con/	con/ftw/						x	
348	act	05/	Apply plaster finish coat to interior walls	009/	con/	con/ftw/						x	
349	act	05/	Apply plaster skim coat to interior walls	009/	con/	con/ftw/						x	
350	act	05/	Apply plaster to exterior surfaces	009/	con/	esk/con/						x	

Master pm check list - listed by data type, seq, action

	data type	seq	action, subject or meaning	est code	wk phase	cmpt	resp cde	01-gen	02-fen	03-pgm	04-dee	05-con	06-foi
351	act	05/	Apply sealer to slab on grade	003/	con/	con/sbw/ftw/						x	
352	act	05/	Apply sprayed concrete for pool basin	003/	con/	con/siw/						x	
353	act	05/	Apply wall covering	009/	con/	con/ftw/						x	
354	act	05/	Apply waterproofing to exterior foundation walls	007/	con/	con/sbw/						x	
355	act	05/	Arrange for such open house activities as might be desired	001/	con/	clo/con/						x	
356	act	05/	Assemble and properly store all shop drawings and other job related submittals	001/	con/	clo/con/						x	
357	act	05/	Assign construction job numbers	001/	con/	con/adm/						x	
358	act	05/	Assist in start up process for equipment (define carefully)	001/	con/	clo/con/						x	
359	act	05/	Backfill and compact at exterior of substructure walls	002/	con/	con/sbw/						x	
360	act	05/	Backfill ext col & wall footings & piers	002/	con/	con/sbw/						x	
361	act	05/	Backfill grade beams	002/	con/	con/sbw/						x	
362	act	05/	Backfill int col footings & piers	002/	con/	con/sbw/						x	
363	act	05/	Balance building areas	002/	con/	con/siw/						x	
364	act	05/	Balance exterior site areas	002/	con/	con/siw/						x	
365	act	05/	Blast rock and remove as required	002/	con/	con/sbw/						x	
366	act	05/	Brace basement walls for early backfilling as required	002/	con/	con/sbw/						x	
367	act	05/	Bring all meeting minutes and record files up-to-date	001	con/	clo/con/						x	
368	act	05/	Carefully read the full contract document close out requirements	001/	con/	clo/con/						x	
369	act	05/	Caulk exterior doors	007/	con/	esk/con/						x	
370	act	05/	Caulk exterior masonry	007/	con/	esk/con/						x	
371	act	05/	Caulk exterior precast panels	007/	con/	esk/con/						x	
372	act	05/	Caulk exterior sash	008/	con/	esk/con/						x	
373	act	05/	Caulk storefronts and entries	008/	con/	esk/con/						x	
374	act	05/	Clean exterior masonry	004/	con/	esk/con/						x	
375	act	05/	Clear & grub site	002/	con/	con/siw/						x	
376	act	05/	Clear final payment on project and obtain proper waivers of lien	001	con/	clo/con/						x	
377	act	05/	Close out and store correspondence and other record files	001/	con/	clo/con/						x	
378	act	05/	Collect and bind all official and unofficial project photos	001	con/	clo/con/						x	
379	act	05/	Collect and record all project network plans, schedules, and bar charts	001/	con/	clo/con/						x	
380	act	05/	Collect, record, and store job logs, diaries, reports, and other project documentation	001	con/	clo/con/						x	
381	act	05/	Complete hook up elevator and equipment room machinery	014/	con/	con/ftw/						x	
382	act	05/	Complete hook up elevator and equipment room machinery	014/	con/	con/ftw/						x	
383	act	05/	Conduct internal project critique and make recommendations for improvements	001/	con/	clo/con/						x	
384	act	05/	Construct exterior building planters	003/004/	con/	con/siw/						x	
385	act	05/	Construct service area enclosure	002/003/004/	con/	con/siw/						x	

Master pm check list - listed by data type, seq, action

data type	seq	action, subject or meaning	csl code	wk phse	cmpt	resp cde	01-	02-	03-	04-	05-	06-
							gen	fen	pgm	des	con	fol
386	act	05/	Cure & strip concrete core walls	003/	con/	con/ssw/						x
387	act	05/	Cure slab on grade to allow construction traffic	003/	con/	con/sbw/						x
388	act	05/	Cure supported concrete deck to post tension	003/	con/	con/ssw/						x
389	act	05/	Cure supported concrete deck to strip & reshore	003/	con/	con/ssw/						x
390	act	05/	Cut & fill main bldg area to final sub grade elevation	002/	con/	con/siw/						x
391	act	05/	Cut & fill site areas outside bldg to sub grade elevation	002/	con/	con/siw/						x
392	act	05/	Cut off piling	002/	con/	con/sbw/						x
393	act	05/	Demolish & remove all existing above grade obstructions as required	002/	con/	dem/con/sit/						x
394	act	05/	Demolish and remove all below grade obstructions as required	002/	con/	dem/con/sit/						x
395	act	05/	Demolish existing structures as required	002/	con/	dem/sit/con/						x
396	act	05/	Drill and fill column caissons	002/	con/	con/sbw/						x
397	act	05/	Drill, install and grout tie backs	002/	con/	con/sbw/						x
398	act	05/	Drive & fill steel shell piles	002/	con/	con/sbw/						x
399	act	05/	Drive and brace soldier beams and install lagging	002/	con/	con/sbw/						x
400	act	05/	Drive prestressed concrete piles	002/	con/	con/sbw/						x
401	act	05/	Drive sheet piling	002/	con/	con/sbw/						x
402	act	05/	Drive steel H piles	002/	con/	con/sbw/						x
403	act	05/	Drive test piling & load	002/	con/	con/sbw/						x
404	act	05/	Drive wood piles	002/	con/	con/sbw/						x
405	act	05/	Dry plaster surfaces	009/	con/	con/tw/						x
406	act	05/	Energize primary transformer	016/	con/	con/siw/						x
407	act	05/	Erect elev shaft studs, in wall work & dry wall to part enclose shafts	009/015/016/	con/	con/tw/						x
408	act	05/	Erect exterior granite	004/	con/	esk/con/						x
409	act	05/	Erect exterior masonry	004/	con/	esk/con/						x
410	act	05/	Erect flagpole	010/	con/	con/siw/						x
411	act	05/	Erect light gauge steel walls and supported decks	005/	con/	con/ssw/						x
412	act	05/	Erect metal floor & roof deck	005/	con/	con/ssw/						x
413	act	05/	Erect metal wall studs for dry wall partitions	009/	con/	con/irw/						x
414	act	05/	Erect misc iron handrails	005/	con/	con/irw/						x
415	act	05/	Erect misc iron ladders	005/	con/	con/irw/						x
416	act	05/	Erect misc iron stairs	005/	con/	con/irw/						x
417	act	05/	Erect struct steel and joists	005/	con/	con/ssw/						x
418	act	05/	Establish hoisting needs and procure hoisting equipment	001/	con/	con/pro/						x
419	act	05/	Establish project const cost acctg system and account numbers	001/	con/	adm/con/						x
420	act	05/	Establish remote project bank accounts	001/	con/	adm/con/						x

Master pm check list - listed by data type, seq, action

	data type	seq	action, subject or meaning	cal code	wk phse	cmpt	resp cde	01-gen	02-fen	03-pgm	04-des	05-con	06-foi
421	act	05/	Establish rental equipment needs and procure equipment		con/	con/pro/						x	
422	act	05/	Establish start of all warranty and guarantee periods prior to owner making job operative	001/	con/	cl/corv						x	
423	act	05/	Excav, instl & backfill site elect & telephone conduit	016/	con/	con/siw/utl/						x	
424	act	05/	Excavate, form, reinforce, pour & strip ext wall & col ftgs	003/	con/	con/sbw/						x	
425	act	05/	Excavate, form, reinforce, pour & strip ext wall & col ftgs	003/	con/	con/sbw/						x	
426	act	05/	Excavate, form, reinforce, pour & strip interior col footings	003/	con/	con/sbw/						x	
427	act	05/	Excavate, form, reinforce, pour and strip grade beams	003/	con/	con/sbw/						x	
428	act	05/	Excavate, install & backfill light pole bases	016/	con/	con/siw/						x	
429	act	05/	Excavate, install & backfill site lighting conduit	016/	con/	con/siw/utl/						x	
430	act	05/	Excavate, install & backfill ug electrical conduit	016/	con/	con/sbw/utl/						x	
431	act	05/	Excavate, install, test & backfill site ug domestic water lines	002/	con/	con/siw/utl/						x	
432	act	05/	Excavate, install, test & backfill site ug fire protection lines	002/	con/	con/siw/utl/						x	
433	act	05/	Excavate, install, test & backfill site ug gas lines	002/	con/	con/siw/utl/						x	
434	act	05/	Excavate, install, test & backfill site ug sanitary sewer lines	002/	con/	con/siw/utl/						x	
435	act	05/	Excavate, install, test & backfill site ug storm sewer lines	002/	con/	con/siw/utl/						x	
436	act	05/	Excavate, install, test & backfill ug bldg roof storm drain lines	015/	con/	con/sbw/utl/						x	
437	act	05/	Excavate, install, test & backfill ug bldg sanitary sewer	015/	con/	con/sbw/utl/						x	
438	act	05/	Excavate, install, test & backfill ug fire protection lines	015/	con/	con/sbw/utl/						x	
439	act	05/	Expedite all deliveries	001/	con/	con/pro/						x	
440	act	05/	Fab & deliver elevator brackets & rails	014/	con/	con/pro/						x	
441	act	05/	Fab & deliver elevator cab interior finishes	014/	con/	con/pro/						x	
442	act	05/	Fab & deliver elevator car frames	014/	con/	con/pro/						x	
443	act	05/	Fab & deliver elevator entrances	014/	con/	con/pro/						x	
444	act	05/	Fab & deliver elevator machine room equipment	014/	con/	con/pro/						x	
445	act	05/	Fab & deliver elevator machine room equipment anchor bolts	014/	con/	con/pro/						x	
446	act	05/	Fab & deliver elevator pit equipment	014/	con/	con/pro/						x	
447	act	05/	Fab & deliver elevator pit tie down steel & embeds	014/	con/	con/pro/						x	
448	act	05/	Fab & deliver elevator plunger casings	014/	con/	con/pro/						x	
449	act	05/	File notice of project start	001/	con/	reg/corv						x	
450	act	05/	Fill & fine grade for interior slab on grade	003/	con/	con/sbw/						x	
451	act	05/	Fill & fine grade for pool perim deck	002/	con/	con/siw/						x	
452	act	05/	Fine grade site areas to bottom of base paving course	002/	con/	con/siw/						x	
453	act	05/	Follow up and receive permanent utility services	001/	con/	con/pro/utl/						x	
454	act	05/	Form & set in floor work for supported concrete deck	003/	con/	con/ssw/						x	
455	act	05/	Form, pour & strip exterior columns	003/	con/	con/ssw/						x	

Master pm check list - listed by data type, seq, action

	data type	seq	action, subject or meaning	csi code	wk phase	cmpt	resp cde	01-gen	02-fen	03-pgm	04-des	05-con	06-foi
456	act	05/	Form, reinf, pour & strip col footing piers	003/	con/	con/sbw/						x	
457	act	05/	Form, reinforce & pour caisson caps	003/	con/	con/sbw/						x	
458	act	05/	Form, reinforce & pour concrete columns	003/	con/	con/ssw/						x	
459	act	05/	Form, reinforce & pour pile caps	003/	con/	con/sbw/						x	
460	act	05/	Form, reinforce & pour transformer bases	002/	con/	con/siw/						x	
461	act	05/	Form, reinforce & set in fl work for supported concrete decks	003/	con/	con/ssw/						x	
462	act	05/	Form, reinforce and pour concrete core walls	003/	con/	con/ssw/						x	
463	act	05/	Form, reinforce, pour & finish concrete curbs & gutters	002/	con/	con/siw/						x	
464	act	05/	Form, reinforce, pour & finish concrete sidewalks	002/	con/	con/siw/						x	
465	act	05/	Form, reinforce, pour & finish concrete truck aprons	002/	con/	con/siw/						x	
466	act	05/	Form, reinforce, pour & strip coils to floor deck above	003/	con/	con/ssw/						x	
467	act	05/	Form, reinforce, pour & strip concrete shaft & shear walls to floor deck above	003/	con/	con/ssw/						x	
468	act	05/	Form, reinforce, pour & strip concrete supported decks on wood forms	003/	con/	con/ssw/						x	
469	act	05/	Grout base plates	003/	con/	con/ssw/						x	
470	act	05/	Grout exterior precast panels	003/	con/	con/ssw/						x	
471	act	05/	Hang ceiling gyp board	009/	con/	con/itw/						x	
472	act	05/	Hang stud wall gyp board	009/	con/	con/itw/						x	
473	act	05/	Hook up & test fire protection 3rd party supervisory system	015/016/	con/	con/itw/						x	
474	act	05/	Hook up elevator machine room equipment	014/	con/	con/itw/						x	
475	act	05/	Hook up food service equipment	011/015/016/	con/	con/itw/						x	
476	act	05/	Hook up snack bar equipment	011/015/016/	con/	con/itw/						x	
477	act	05/	Inspect & approve elevator car operation	014/	con/	reg/con/usy/						x	
478	act	05/	Install above clg electrical distribution conduit	016/	con/	con/irw/						x	
479	act	05/	Install above clg interior domestic sewer piping	015/	con/	con/irw/						x	
480	act	05/	Install above clg interior domestic water piping	015/	con/	con/irw/						x	
481	act	05/	Install above clg interior gas piping	015/	con/	con/irw/						x	
482	act	05/	Install above clg interior roof drain leader	015/	con/	con/irw/						x	
483	act	05/	Install above clg sheet metal ductwork for hvac	015/	con/	con/irw/						x	
484	act	05/	Install above clg supports for folding partitions	005/006/	con/	con/irw/						x	
485	act	05/	Install acceleration & deceleration lanes on adjoining roads	002/	con/	con/siw/						x	
486	act	05/	Install acoustic ceiling panels	009/	con/	con/itw/						x	
487	act	05/	Install acoustic ceiling suspension & grid	009	con/	con/itw/						x	
488	act	05/	Install and adjust sprinkler heads	015/	con/	con/itw/						x	
489	act	05/	Install and test above floor fire sprinkler laterals and drops	015/	con/	con/irw/						x	
490	act	05/	Install and test above floor fire sprinkler risers	015/	con/	con/irw/						x	

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	data type	seq	action, subject or meaning	cal code	wk phase	cmpt	resp cde	01-gen	02-fen	03-pgm	04-des	05-con	06-foi
491	act	05/	Install below floor electrical rough in to above floor equipment	016/	con/	con/irw/						x	
492	act	05/	Install bike racks	006/	con/	con/siw/						x	
493	act	05/	Install borrowed light hollow metal frames	008/	con/	con/irw/						x	
494	act	05/	Install building mounted security cameras	016/	con/	esk/con/						x	
495	act	05/	Install building mounted security lighting	016/	con/	esk/con/						x	
496	act	05/	Install carpet	009/	con/	con/tfw/						x	
497	act	05/	Install ceiling grills & diffusers	015/	con/	con/tfw/						x	
498	act	05/	Install ceramic tile walls and floors	009/	con/	con/tfw/						x	
499	act	05/	Install coiling doors & grills	008/	con/	con/irw/						x	
500	act	05/	Install compactor and baler equipment	011/	con/	con/tfw/						x	
501	act	05/	Install conveyor covers	015/	con/	con/tfw/						x	
502	act	05/	Install curb cuts & aprons	002/	con/	con/siw/						x	
503	act	05/	Install data phone system	016/	con/	con/usy/						x	
504	act	05/	Install dock levelers	011/	con/	con/tfw/						x	
505	act	05/	Install dock levelers (to form leveler pit)	011/	con/	con/irw/						x	
506	act	05/	Install dock seals and bumpers	011/	con/	esk/con/						x	
507	act	05/	Install door hardware	008/	con/	con/tfw/						x	
508	act	05/	Install draperies	012/	con/	con/tfw/						x	
509	act	05/	Install drapery tracks	012/	con/	con/tfw/						x	
510	act	05/	Install electrical lighting distribution panels	016/	con/	con/irw/						x	
511	act	05/	Install electrical power distribution panels	016/	con/	con/irw/						x	
512	act	05/	Install electrical power equipment disconnects	016/	con/	con/tfw/						x	
513	act	05/	Install elevator doors at floors	014/	con/	con/tfw/						x	
514	act	05/	Install elevator entrances (minus doors)	014/	con/	con/tfw/						x	
515	act	05/	Install elevator equipment room machinery	013/	con/	con/tfw/						x	
516	act	05/	Install elevator pit equipment	014/	con/	con/tfw/						x	
517	act	05/	Install elevator rail brackets & car & counterweight rails	014/	con/	con/tfw/						x	
518	act	05/	Install elevator rails	014/	con/	con/tfw/						x	
519	act	05/	Install emergency generator	016/	con/	con/usy/						x	
520	act	05/	Install expansion joint assemblies at roof as required	007/	con/	esk/con/						x	
521	act	05/	Install ext hard ceiling soffit framing	009/	con/	esk/con/						x	
522	act	05/	Install exterior door hardware	008/	con/	esk/con/						x	
523	act	05/	Install exterior glass in store/front & entries	008/	con/	esk/con/						x	
524	act	05/	Install exterior man doors	008/	con/	esk/con/						x	
525	act	05/	Install fin tube piping	015/	con/	con/tfw/						x	

Master pm check list - listed by data type, seq, action

data type	seq	action, subject or meaning	cel code	wk phse	cmpt	resp cde	01-	02-	03-	04-	05-	06-
							gen	fen	pgm	des	con	fol
526	act	05/	Install fire extinguisher cabinets	010/	con/	con/irw/						x
527	act	05/	Install fire extinguishers	010/	con/	con/irw/						x
528	act	05/	Install flag pole foundation	002/	con/	con/siw/						x
529	act	05/	Install folding partitions	010/	con/	con/irw/						x
530	act	05/	Install hangers & grid for acoustical ceiling	009/	con/	con/irw/						x
531	act	05/	Install hard ceiling suspension and framing	009/	con/	con/irw/						x
532	act	05/	Install hardware cloth walls	006/	con/	con/irw/						x
533	act	05/	Install hollow metal door frames	008/	con/	con/irw/						x
534	act	05/	Install hose rack stations	015/	con/	con/irw/						x
535	act	05/	Install in rack sprinkler piping and heads	015/	con/	con/irw/						x
536	act	05/	Install in wall rough domestic plumbing work	015/	con/	con/irw/						x
537	act	05/	Install in wall rough elect work	016/	con/	con/irw/						x
536	act	05/	Install in wall rough electrical conduit and feeders	016/	con/	con/irw/						x
539	act	05/	Install in wall rough hvac work	015/	con/	con/irw/						x
540	act	05/	Install in wall rough medical gas piping	015/	con/	con/irw/						x
541	act	05/	Install in-wall wood blocking	006/	con/	con/irw/						x
542	act	05/	Install insulation at exterior wall spandrels	007/	con/	con/irw/						x
543	act	05/	Install int wood doors	008/	con/	con/irw/						x
544	act	05/	Install interior building pavers	009/	con/	con/irw/						x
545	act	05/	Install interior hollow metal doors	008/	con/	con/irw/						x
546	act	05/	Install job site temporary permanent power	016/	con/	con/ulv/sil/						x
547	act	05/	Install job site temporary power	016/	con/	con/ulv/sil/						x
548	act	05/	Install landscaping	002/	con/	con/siw/						x
549	act	05/	Install lay in light fixtures	016/	con/	con/irw/						x
550	act	05/	Install louvers in exterior walls	010/	con/	esk/con/						x
551	act	05/	Install marble floor and wall finishes	004/	con/	con/irw/						x
552	act	05/	Install metal stairs and handrails	005/	con	con/irw/						x
553	act	05/	Install millwork & trim	006/	con/	con/irw/						x
554	act	05/	Install miscellaneous iron for exterior skin work	005/	con/	esk/con/						x
555	act	05/	Install plumbing fixtures	015/	con/	con/irw/						x
556	act	05/	Install plumbing stub outs	015/	con/	con/irw/						x
557	act	05/	Install quarry tile floors	009/	con/	con/irw/						x
558	act	05/	Install recessed light fixtures	016/	con/	con/irw/						x
559	act	05/	Install roof drains and overflow drains	015/007/	con/	esk/con/						x
560	act	05/	Install roof equipment curbs	006/007/	con/	con/ssw/						x

Master pm check list - listed by data type, seq, action

	data type	seq	action, subject or meaning	est code	wk phase	empr	resp cde	01-gen	02-fen	03-pgm	04-des	05-con	06-foi
561	act	05/	Install roof flashings & trim	007/	con/	esk/con/						x	
562	act	05/	Install roof mounted mechanical equipment	015/	con/	esk/con/						x	
563	act	05/	Install roof scuppers and downspouts	015/007/	con/	esk/con/						x	
564	act	05/	Install roof shingles	007/	con/	esk/con/						x	
565	act	05/	Install shear studs	005/	con/	con/ssw/						x	
566	act	05/	Install sheet metal curbs	015/007/	con/	esk/con/						x	
567	act	05/	Install sheet metal roof flashings and trim	007/	con/	esk/con/						x	
568	act	05/	Install signage	010/	con/	con/ftw/						x	
569	act	05/	Install site ditch drains and culverts	002/	con/	con/siw/						x	
570	act	05/	Install site pavers	002/	con/	con/siw/						x	
571	act	05/	Install sliding metal fire doors	008/	con/	esk/con/						x	
572	act	05/	Install standing seam metal roof deck	005/	con/	esk/con/						x	
573	act	05/	Install storefront & entry alum framing	008/	con/	esk/con/						x	
574	act	05/	Install surface mounted light fixtures	016/	con/	con/ftw/						x	
575	act	05/	Install telephone cable to building	016/	con/	con/siw/utl/						x	
576	act	05/	Install temporary closures at elevator shafts to protect from weather	001/	con/	con/irw/						x	
577	act	05/	Install temporary utilities	002/	con/	con/siw/						x	
578	act	05/	Install temporary utilities	001/	con/	gr/con/utl/						x	
579	act	05/	Install toilet room accessories	010/	con/	con/ftw/						x	
580	act	05/	Install toilet room partitions	010/	con/	con/ftw/						x	
581	act	05/	Install traffic doors	010/	con/	con/ftw/						x	
582	act	05/	Install traffic signals & controllers	016/	con/	con/siw/						x	
583	act	05/	Install underpinning	002/	con/	con/sbw/						x	
584	act	05/	Install viewports	010/	con/	con/ftw/						x	
585	act	05/	Install vinyl strip doors	010/	con/	con/ftw/						x	
586	act	05/	Install water stops in substructure walls as required	003/	con/	con/sbw/						x	
587	act	05/	Install window blinds	012/	con/	con/ftw/						x	
588	act	05/	Install wood handrails and trim	008/	con/	con/ftw/						x	
589	act	05/	Install wood overhead doors	008/	con/	esk/con/						x	
590	act	05/	Install, glaze & caulk interior windows	008/	con/	con/ftw/						x	
591	act	05/	Instl & lamp site light fixtures	016/	con/	con/siw/						x	
592	act	05/	Instl & wire guard station panel & equipment	016/	con/	con/usy/						x	
593	act	05/	Instl elevator car enclosures	014/	con/	con/ftw/						x	
594	act	05/	Instl elevator car frames	014/	con/	con/ftw/						x	
595	act	05/	Instl elevator control systems	014/	con/	con/usy/						x	

Master pm check list - listed by data type, seq, action

	data type	seq	action, subject or meaning	csi code	wk phase	cmpt	resp cde	01-gen	02-fen	03-pgm	04-des	05-con	06-foi
596	act	05/	Instl elevator fire command room	016/	con/	con/usy/						x	
597	act	05/	Instl elevator life safety systems	014/016/	con/	con/usy/						x	
598	act	05/	Instl hoistway wiring	014/	con/	con/ftw/						x	
599	act	05/	Insure that your company identification is shown somewhere in the building if permitted	001/	con/	clo/con/						x	
600	act	05/	Insure the building is as clean or cleaner than specified when you move out.	001/	con/	clo/con/						x	
601	act	05/	Label all elect panel boxes, plmbg, valves and equip for proper operation and maintenance	015/016/	con/	clo/con/						x	
602	act	05/	Lay and part backfill footing drain tile	002/	con/	con/sbw/						x	
603	act	05/	Lay asphalt base course	002/	con/	con/siw/						x	
604	act	05/	Lay asphalt wearing course	002/	con/	con/siw/						x	
605	act	05/	Lay insulation & built up roofing	007/	con/	esk/con/						x	
606	act	05/	Lay out building	001/	con/	con/siw/						x	
607	act	05/	Lay out column lines & interior elevations	001/	con/	con/sbw/						x	
608	act	05/	Lay resilient flooring	009/	con/	con/ftw/						x	
609	act	05/	Lay roof insulation	007/	con/	esk/con/						x	
610	act	05/	Lay single ply roof membrane	007/	con/	esk/con/						x	
611	act	05/	Lay vapor barrier for slab on grade	007/	con/	con/sbw/						x	
612	act	05/	Locate, remove, relocate all existing cable tv lines as required	002/	con/	dem/con/sit/ur V						x	
613	act	05/	Locate, remove, relocate all existing electrical lines as required	002/	con/	dem/con/sit/ur V						x	
614	act	05/	Locate, remove, relocate all existing phone lines as required	002/	con/	dem/con/sit/ur V						x	
615	act	05/	Locate, remove, relocate or cap all existing gas lines as required	002/	con/	dem/con/sit/ur V						x	
616	act	05/	Locate, remove, relocate, cap all existg special use utilities as reqd	002/	con/	dem/con/sit/ur V						x	
617	act	05/	Locate, remove, relocate, cap all existing sanitary lines as required	002/	con/	dem/con/sit/ur V						x	
618	act	05/	Locate, remove, relocate, cap all existing storm lines as required	002/	con/	dem/con/sit/ur V						x	
619	act	05/	Locate, remove, relocate, cap all existing water lines as required	002/	con/	dem/con/sit/ur V						x	
620	act	05/	Maintain inventory of tools & equipment	001/	con/	con/adm/						x	
621	act	05/	Make elevators operative	014/	con/	con/ftw/						x	
622	act	05/	Mass excav, instl undergrd util and grade for pool sprayed conc	002/	con/	con/siw/						x	
623	act	05/	Mass excavate for substructure work	002/	con/	con/sbw/						x	
624	act	05/	Mobilize and move driving rig on site	002/	con/	con/sbw/						x	
625	act	05/	Negotiate construction contracts with clients		con/	con/clt/						x	
626	act	05/	Obtain all waivers of liens	001/	con/	adm/con/						x	
627	act	05/	Obtain and distribute site addresses	001/	con/	adm/con/						x	
628	act	05/	Obtain certificate of occupancy	001/	con/	clo/con						x	
629	act	05/	Obtain certificate of occupancy	001/	con/	reg/con/						x	
630	act	05/	Obtain certificate of substantial completion	001/	con/	clo/con/						x	

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	data type	seq	action, subject or meaning	csi code	wk phase	cmpt	resp cde	01-gen	02-fen	03-pgm	04-des	05-con	06-foi
631	act	05/	Obtain guarantees	001/	con/	clo/con/						x	
632	act	05/	Obtain project operating and maintenance manuals	001/	con/	clo/con/						x	
633	act	05/	Obtain subcontractor information	001/	con/	con/pro/						x	
634	act	05/	Obtain warranties	001/	con/	clo/con						x	
635	act	05/	Obtain, prepare, or issue final change order reflecting adjustments to contract amounts	001/	con/	clo/con/						x	
636	act	05/	Order/detail/approve/fab & deliver elevator	014/	con/	con/usy/pro/						x	
637	act	05/	Order/detail/approve/fab & deliver emergency generator	016/	con/	con/usy/pro/						x	
638	act	05/	Paint required exterior surfaces	009/	con/	esk/con/						x	
639	act	05/	Paint required interior surfaces	009/	con/	con/fin/						x	
640	act	05/	Plan & implement systems training programs as required	001/	con/	clo/con/						x	
641	act	05/	Plan and implement grand opening of project as required	001/	con/	clo/con/						x	
642	act	05/	Plumb, bolt & detail structural steel & joists	005/	con/	con/ssw/						x	
643	act	05/	Poison subbase	002/	con/	con/sbw/						x	
644	act	05/	Pour conc slabs and curbs on metal deck	003/	con/	con/ssw/						x	
645	act	05/	Pour out interior slab on grade	003/	con/	con/sbw/						x	
646	act	05/	Pour out pool perim slab on grade deck	003/	con/	con/siw/						x	
647	act	05/	Pour out supported concrete decks	003/	con/	con/ssw/						x	
648	act	05/	Prep & issue sub contractor construction contracts & po's	001/	con/	con/pro/cot/						x	
649	act	05/	Prep & submit contractor dwgs for elev fixture design, mls & colors	014/	con/	con/pro/sub/						x	
650	act	05/	Prepare & maintain general conditions material analyses	001/	con/	cos/con/						x	
651	act	05/	Prepare & maintain past & current administrative labor analyses	001/	con/	cos/con/						x	
652	act	05/	Prepare & submit contractor drawings of elevator doors, frames & cabs	014/	con/	con/pro/sub/						x	
653	act	05/	Prepare & submit elevator hoistway, pit & machine room shop drawings	014/	con/	con/pro/sub/						x	
654	act	05/	Prepare & submit elevator machine room anchor bolt shop drawings	014/	con/	con/pro/sub/						x	
655	act	05/	Prepare & submit elevator pit tie down steel & embeds shop drawings	014/	con/	con/pro/sub/						x	
656	act	05/	Prepare & submit summary construction reports	001/	con/	rep/con/						x	
657	act	05/	Prepare and maintain past & current field labor analyses	001/	con/	cos/con/						x	
658	act	05/	Prepare and submit const document record set (formerly called the as built record set)	001/	con/	clo/con/						x	
659	act	05/	Prepare and submit to the owner damage and settlement surveys of the site and facilities	001/	con/	clo/con/						x	
660	act	05/	Prepare and submit to the owner final property surveys of the site	001/	con/	clo/con/						x	
661	act	05/	Prepare and submit to the owner maintenance agreements as specified	001/	con/	clo/con/						x	
662	act	05/	Prepare and submit to the owner workmanship or maintenance bonds required	001/	con/	clo/con/						x	
663	act	05/	Prepare employee site conduct guidelines	001/	con/	con/adm/						x	
664	act	05/	Prepare field cost, hour, quantity budget targets	001/	con/	cos/con/						x	
665	act	05/	Prepare list of early submittals needed and assign to project staff for doing	001/	con/	con/pro/sub/						x	

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	data type	seq	action, subject or meaning	csi code	wk phase	cmpt	resp cde	01-gen	02-fen	03-pgm	04-des	05-con	06-fol
666	act	05/	Prepare list of vendors providing bidding information	001/	con/	con/prc/						x	
667	act	05/	Prepare material procurement purchase orders	001/	con/	con/prc/						x	
668	act	05/	Prepare over/under analysis of proposals and buy out	001/	con/	cos/con/prc/						x	
669	act	05/	Prepare project construction network model	001/	con/	con/pas/						x	
670	act	05/	Prepare project construction schedules	001/	con/	con/pas/						x	
671	act	05/	Prepare subcontractor selection list	001/	con/	con/prc/						x	
672	act	05/	Process submittals	001/	con/	con/prc/						x	
673	act	05/	Properly train and turn over the facility to the owner's representatives	001/	con/	clo/con/						x	
674	act	05/	Provide all keys and keying schedules	008/	con/	clo/con						x	
675	act	05/	Provide field with field budgets	001/	con/	cos/con/						x	
676	act	05/	Provide owner and user with an up-to-date set of construction documents for reference use	001	con/	clo/con/						x	
677	act	05/	Provide owner copies of all releases that allow building occupancy	001/	con/	clo/con/						x	
678	act	05/	Provide owner with complete list of contractors and vendors on job and what they did	001/	con/	clo/con/						x	
679	act	05/	Provide project staff with copies of office field procedure & policy manuals	001/	con/	adm/con/						x	
680	act	05/	Provide subcontractors with adequate construction documents	001/	con/	adm/con/						x	
681	act	05/	Provide temporary permanent power to machine rooms for elev installation	016/	con/	con/ftw/						x	
682	act	05/	Pull electrical distribution wire in conduit	016/	con/	con/irw/						x	
683	act	05/	Pull primary cable and connect transformer	016/	con/	con/siw/ut/						x	
684	act	05/	Punch out project	001/	con/	clo/con/						x	
685	act	05/	Receive and file all executed sub contracts	001/	con/	con/prc/cot/						x	
686	act	05/	Remove existing below grade concrete as required	002/	con/	con/siw/dem/						x	
687	act	05/	Remove existing concrete foundations	002/	con/	con/siw/						x	
688	act	05/	Request and implement special inspections of project	001/	con/	con/isp/						x	
689	act	05/	Request arch/engr of record to make certificate of substantial completion inspection	001/	con/	clo/con/						x	
690	act	05/	Review & approve contractor drawings of elevator doors, frames & cabs	014/	con/	con/prc/sub/						x	
691	act	05/	Review & approve contractor dwgs for elev fixtures	014/	con/	con/prc/sub/						x	
692	act	05/	Review & approve contractor dwgs for elevator entrances	014/	con/	con/prc/sub/						x	
693	act	05/	Review & approve elevator hoistway, pit & machine room shop drawings	014/	con/	con/prc/sub/						x	
694	act	05/	Review & approve elevator machine room anchor bolt shop drawings	014/	con/	con/prc/sub/						x	
695	act	05/	Review & approve elevator pit tie down steel & embeds shop drawings	014/	con/	con/prc/sub/						x	
696	act	05/	Review and evaluate const sub contract proposals	001/	con/	con/prc/						x	
697	act	05/	Review consent of surety reqmts & distribute info as appropriate	001/	con	clo/con/						x	
698	act	05/	Review purchase order conditions with subcontractors	001/	con/	con/prc/						x	
699	act	05/	Review submittal processes with subcontractor & obtain their agreement	001/	con/	sub/con/						x	
700	act	05/	Rid job of all rodents, insects, and other pests by an experienced exterminator	001/	con/	clo/con/						x	

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	data type	seq	action, subject or meaning	cal code	wk phase	cmt	resp cde	01-	02-	03-	04-	05-	06-
								gen	fen	pgm	des	con	fol
701	act	05/	Rough grade site areas as required	002/	con/	con/siw/						x	
702	act	05/	Rough wood frame walls and floor system	006/	con/	con/ssw/						x	
703	act	05/	Rub exposed concrete surfaces on supporting structures	003/	con/	con/ssw/						x	
704	act	05/	Rub exposed foundation concrete	003/	con/	con/sbw/						x	
705	act	05/	Run in food service equipment	011/	con/	con/usy/						x	
706	act	05/	Saw cut slab on grade	003/	con/	con/sbw/						x	
707	act	05/	Seal slab on grade saw cut joints	003/	con/	con/sbw/						x	
708	act	05/	Send deserved thank you letters to the owner, designers, and contractors involved	001/	con/	clt/con/						x	
709	act	05/	Set & embed vehicle guard posts	005/	con/	con/siw/						x	
710	act	05/	Set & implement sub contr payment procedures	001/	con/	adm/con/gcr/						x	
711	act	05/	Set anchor bolts in footings, piers and walls	003/	con/	con/sbw/						x	
712	act	05/	Set elevator machine beams	014/	con/	con/tfw/						x	
713	act	05/	Set elevator machine room equipment	014/	con/	con/tfw/						x	
714	act	05/	Set embeds in ext wall footings	005/	con/	con/sbw/						x	
715	act	05/	Set embeds in substructure walls as required	003/015/016/	con/	con/sbw/						x	
716	act	05/	Set embeds in supported concrete deck	003/	con/	con/ssw/						x	
717	act	05/	Set food service equipment	011/	con/	con/tfw/						x	
718	act	05/	Set horz & vertical controls	002/	con/	con/siw/						x	
719	act	05/	Set in floor work for interior slab on grade	003/	con/	con/sbw/						x	
720	act	05/	Set perm insulation at substructure walls	007/	con/	con/sbw/						x	
721	act	05/	Set project close out procedures	001/	con/	clt/con/						x	
722	act	05/	Set sleeves in substructure walls as required	015/016/	con/	con/sbw/						x	
723	act	05/	Set transformers on base	016/	con/	con/siw/utl/						x	
724	act	05/	Set up field petty cash account & provide cash to field staff	001/	con/	adm/con/						x	
725	act	05/	Set, align, & secure exterior precast panels	003/005/	con/	esk/con/						x	
726	act	05/	Solicit & receive const sub contract proposals	001/	con/	con/pro/col/						x	
727	act	05/	Solicit & receive elevator proposals	014/	con/	con/pro/						x	
728	act	05/	Spray on fireproofing at elevator hoistway struct steel framing	007/	con/	con/tfw/						x	
729	act	05/	Spray on fireproofing at interior struct steel members	007/	con/	con/tfw/						x	
730	act	05/	Spray on fireproofing at perimeter struct steel members	007/	con/	con/tfw/						x	
731	act	05/	Stabilize soil	002/	con/	con/sbw/						x	
732	act	05/	Stockpile excavated material	002/	con/	con/siw/						x	
733	act	05/	Strip & reshore supported concrete deck	003/	con/	con/ssw/						x	
734	act	05/	Strip concrete columns	003/	con/	con/ssw/						x	
735	act	05/	Strip site	009/	con/	con/siw/						x	

Master pm check list - listed by data type, seq, action

	data type	seq	action, subject or meaning	cal code	wk phase	cmpt	resp cde	01-gen	02-fen	03-pgm	04-des	05-con	06-foi
736	act	05/	Stripe parking and roadway areas	009/	con/	con/siw/						x	
737	act	05/	Stripe vehicle and pedestrian areas	009/	con/	con/siw/						x	
738	act	05/	Submit final billing to owner for all incomplete items and a proper cost assigned to each	001/	con/	clo/con/						x	
739	act	05/	Submit final statement of accounting as required, to owner and architect/engineer	001/	con/	clo/con						x	
740	act	05/	Submit final utility meter readings, and records of stored fuel at time of substantial completion	001/	con/	clo/con/						x	
741	act	05/	Submit to owner, consent of surety to final payment if required	001/	con/	clo/con/						x	
742	act	05/	Tape & sand ceiling dry wall	009/	con/	con/ftw/						x	
743	act	05/	Tape & sand wall gyp board	009/	con/	con/ftw/						x	
744	act	05/	Test & balance air systems	015/	con/	con/usy/						x	
745	act	05/	Total strip supported concrete deck	003/	con/	con/ssw/						x	
746	act	05/	Train staff on food service equipment use and maintenance	011/	con/	con/usy/						x	
747	act	05/	Turn over project to client	001/	con/	clo/con/						x	
748	act	05/06/	Follow up on corrective work required during warranty period	001/	con/foi/	con/clo/war/foi						x	x
749	act	05/06/	Put owner on marketing and mailing lists and other action tickler lists as appropriate	001/	con/foi/	clo/con/foi/mk/foi						x	x
750	act/	05/	Prepare and submit to the owner specific warranties as specified	001/	con/	clo/con/						x	
751	par	01/	- rsp - Responsibility codes		gen/	gen/rsp/	x						
752	par	01/	Acoustic contractor	009/	gen/	gen/rsp/	x						
753	par	01/	Architect/engineer	001/	gen/	gen/rsp/	x						
754	par	01/	Caisson contractor	002/	gen/	gen/rsp/	x						
755	par	01/	Carpentry contractor	006/	gen/	gen/rsp/	x						
756	par	01/	Concrete contractor	003/	gen/	gen/rsp/	x						
757	par	01/	County agencies	001/	gen/	gen/rsp/	x						
758	par	01/	Data phone system	015/	gen/	gen/rsp/	x						
759	par	01/	Department of Public Works	001/	gen/	gen/rsp/	x						
760	par	01/	Department of Transportation	001/	gen/	gen/rsp/	x						
761	par	01/	Dock leveller contractor	011/	gen/	gen/rsp/	x						
762	par	01/	Drywall contractor	009/	gen/	gen/rsp/	x						
763	par	01/	Electrical contractor	015/	gen/	gen/rsp/	x						
764	par	01/	Excavation contractor	002/	gen/	gen/rsp/	x						
765	par	01/	Federal agencies	001/	gen/	gen/rsp/	x						
766	par	01/	Fire extinguisher contractor	010/	gen/	gen/rsp/	x						
767	par	01/	Fire marshall	001/	gen/	gen/rsp/	x						
768	par	01/	Folding partition contractor	010/	gen/	gen/rsp/	x						
769	par	01/	Food service equipment contractor	011/	gen/	gen/rsp/	x						
770	par	01/	Gas company	001/	gen/	gen/rsp/	x						

Master pm check list - listed by data type, seq. action

	data type	seq	action, subject or meaning	cat code	wk phase	cmpt	resp cde	01-gen	02-fen	03-pgm	04-des	05-con	06-foi
771	par	01/	General contractor	001/	gen/	gen/rsp/		x					
772	par	01/	Glass and glazing contractor	008/	gen/	gen/rsp/		x					
773	par	01/	Hard tile contractor	009/	gen/	gen/rsp/		x					
774	par	01/	Hardware installer	008/	gen/	gen/rsp/		x					
775	par	01/	Hollow metal fabricator	008/	gen/	gen/rsp/		x					
776	par	01/	HVAC contractor	015/	gen/	gen/rsp/		x					
777	par	01/	Insurance rate setter	001/	gen/	gen/rsp/		x					
778	par	01/	Irrigation contractor	002/	gen/	gen/rsp/		x					
779	par	01/	Landscape contractor	002/	gen/	gen/rsp/		x					
780	par	01/	Mechanical contractor	015/	gen/	gen/rsp/		x					
781	par	01/	Metal deck contractor	005/	gen/	gen/rsp/		x					
782	par	01/	Millwork contractor	006/	gen/	gen/rsp/		x					
783	par	01/	Miscellaneous iron contractor	005/	gen/	gen/rsp/		x					
784	par	01/	Municipal agencies	001/	gen/	gen/rsp/		x					
785	par	01/	osr (on site representative)	001/	gen/	gen/rsp/		x					
786	par	01/	Overhead door contractor	008/	gen/	gen/rsp/		x					
787	par	01/	Painting contractor	009/	gen/	gen/rsp/		x					
788	par	01/	Paving contractor	003/	gen/	gen/rsp/		x					
789	par	01/	Power company	001/	gen/	gen/rsp/		x					
790	par	01/	Precast erector	003/	gen/	gen/rsp/		x					
791	par	01/	Resilient floor tile contractor	009/	gen/	gen/rsp/		x					
792	par	01/	Resteel supplier	003/	gen/	gen/rsp/		x					
793	par	01/	Rolling curtain contractor	008/	gen/	gen/rsp/		x					
794	par	01/	Roof top unit fabricator	015/	gen/	gen/rsp/		x					
795	par	01/	Roofing contractor	007/	gen/	gen/rsp/		x					
796	par	01/	Signage contractor	010/	gen/	gen/rsp/		x					
797	par	01/	Site utility contractor	002/	gen/	gen/rsp/		x					
798	par	01/	Sliding door contractor	008/	gen/	gen/rsp/		x					
799	par	01/	Sprinkler contractor	015/	gen/	gen/rsp/		x					
800	par	01/	State agencies	001/	gen/	gen/rsp/		x					
801	par	01/	Steel erector	005/	gen/	gen/rsp/		x					
802	par	01/	Striping contractor	009/	gen/	gen/rsp/		x					
803	par	01/	Structural steel contractor	005/	gen/	gen/rsp/		x					
804	par	01/	Telephone company	016/	gen/	gen/rsp/		x					
805	par	01/	Toilet partition contractor	010/	gen/	gen/rsp/		x					

Master pm check list - listed by data type, seq. action

	data type	seq	action, subject or meaning	csi code	wk phase	cmpt	resp cde	01-gen	02-fen	03-pgm	04-des	05-con	06-foi
006	act	05/	Rid job of all rodents, insects, and other pests by an experienced exterminator	001/	con/	cla/con/						x	
007	act	05/	Carefully read the full contract document close out requirements	001/	con/	cla/con/						x	