

Consideration	N/A	✓	Notes
<p>The activities of item 1. occur continuously throughout the project. They are inserted here and at the beginning of each phase as a reminder. The beginning of each phase is always a good time for a team update and reminder about basic communications.</p>			
1. Review:			
.1 Scope of work for this phase with stakeholders:			
• client;			
• project team, including consultants.			
.2 Update risk register:			
• identify and analyze project risks on a regular basis;			
• implement risk strategies to address project uncertainty;			
• review unresolved risks whenever new team members are added and/or a new project phase is started.			
.3 Keep design coordination meeting notes:			
• identify issues and their resolution;			
• distribute to all project team members.			
.4 Identify additional services as required during this phase:			
• obtain client agreement as to services and remuneration before executing.			
2. Review prescribed procedures, e.g., specifications and other documentation.			
3. Arrange for appropriate personnel to attend demonstration(s) of systems, including take-over of applicable operating systems and instructions.			
.1 Obtain appropriate record.			
4. Receive from the contractor application for Certificate of Substantial Performance and list of items to be completed or corrected.			
5. Carry out site visit for substantial performance.			
6. Review findings in relation to contract and provincial lien legislation.			

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.1 Certify substantial performance or notify the contractor if substantial performance not certified and provide reasons.			
7. Obtain and review required documents for release of holdback monies.			
.1 Issue Certificate for Payment for release of holdback.			
8. Assist the client in obtaining occupancy permit if required or requested.			
9. Obtain from the contractor:			
• warranties			
• certificates of inspection			
• equipment manuals			
• workers compensation certificate			
• operating instructions			
• statutory declaration documents			
• keying schedules			
• maintenance stock			
• record drawings			
• other specified items			
10. Receive from the contractor, application for statement of completion.			
11. Carry out site visit for completion.			
12. Review findings in relation to contract and provincial lien legislation.			
Issue:			
• statement of completion or notify contractor if project not found to be complete			
• reasons			
13. Issue Certificate for Payment of holdback for work based on the contractor's application for statement of completion.			
14. Receive the contractor's written notice that all work has been totally completed.			
15. Perform final visit to site.			
.1 Issue site visit report.			
16. Receive from the contractor final application for payment.			

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17. Issue final Certificate for Payment.			
18. Prepare record drawings if required.			
.1 Identify specified format, i.e., paper, CADD, BIM.			
19. Submit final invoices to the client.			
20. Advise professional liability insurer of project completion date, as required.			
21. Review reported defects during one-year warranty period.			
.1 Review client-architect agreement for notification and review requirements.			
.2 Notify the contractor of items requiring correction.			
22. Participate in review of reported defects or deficiencies prior to expiry of one-year warranty period as per client-architect agreement.			
.1 Notify the contractor of items requiring correction.			