SITE survey. APP

SITE SURVEY REPORT

Construction Closeout Checklist

Prepared for	Alder Creek Physicians Group
Date	23 Oct 2026
Site	Linden Park Medical Office, Columbus
Prepared by	T. Abernathy

FORM

Construction Closeout Checklist

1. Project and closeout

Project	Linden Park Medical Office, Columbus: closeout checklist (completed example)
Project address	4410 Kestrel Run Road, Columbus, OH 43230
Owner or client	Alder Creek Physicians Group
Location (GPS)	40.0412, -82.8869
Closeout review date	23 Oct 2026
Prepared by	T. Abernathy, project superintendent
Contractor	Brightwater Builders Inc.
Job or contract number	BW-2614
Architect, engineer or contract administrator	M. Feld, Corvane Architects
Owner's representative	R. Okonjo, practice manager
Where is the project?	United States
Substantial or practical completion date	16 Oct 2026
Certificate reference	Certificate of substantial completion signed by the architect, 16 Oct 2026
Days from completion to this review	7
Target date to finish closeout	20 Nov 2026

> This is the contractor's closeout tracker. It records what is done and what is left. It is not a certificate of substantial or practical completion, a certificate of occupancy or a final account, and it does not certify that the work meets the code or the contract.

2. Punch list, inspections and final approval

Punch list reference and revision	Linden Park punch list, Rev 1 after the 23 Oct back-check
Items on the punch list	38
Items still open	4
Date of the last punch walk	23 Oct 2026
Punch items closed (%)	89

Inspections and approvals 1: Fire alarm acceptance test

Inspection or approval	Fire alarm acceptance test
Authority or inspector	Fire prevention bureau
Date	9 Oct 2026
Result	Passed
Reference	Report EXAMPLE-FA-01

Inspections and approvals 2: Sprinkler final

Inspection or approval	Sprinkler final
Authority or inspector	Fire prevention bureau
Date	8 Oct 2026
Result	Passed
Reference	Report EXAMPLE-SP-01

Inspections and approvals 3: Elevator acceptance inspection

Inspection or approval	Elevator acceptance inspection
Authority or inspector	State elevator inspector
Date	12 Oct 2026
Result	Passed
Reference	Report EXAMPLE-ELV-01
Inspections listed	3
Failed or not yet done	0
Final approval	Certificate of occupancy issued
Reference and date	CO EXAMPLE-2614, issued 15 Oct 2026

3. Commissioning and test certificates

Certificates and reports 1: HVAC and ventilation

System	HVAC and ventilation
Certificate or report	Test and balance report

Issued by	Summit Air Balance LLC
Date of the test	13 Oct 2026
Status	Received

Certificates and reports 2: Fire alarm

System	Fire alarm
Certificate or report	Fire alarm record of completion
Issued by	Beacon Fire Systems
Date of the test	9 Oct 2026
Status	Received

Certificates and reports 3: Lighting and emergency lighting

System	Lighting and emergency lighting
Certificate or report	Emergency lighting test report
Issued by	Larkfield Electric
Date of the test	15 Oct 2026
Status	To follow
Who will send it, and by when	Larkfield Electric, by 30 Oct
Listed	3
Still to follow	1

4. Manuals, drawings and warranties

Operation and maintenance (O&M) manuals for the installed systems and equipment	Done
As-built (record) drawings showing the work as installed	Outstanding
What needs doing, or why not checked	Mechanical as-builts not received from Keystone Mechanical. Marked-up set promised by 30 Oct.
Final product data, approved submittals and the finish schedule	Done
Maintenance schedule or planned maintenance information for the owner	Done

Photo of the documents handed over



Enter each warranty start date and length exactly as the contract or the warranty states them; the form sets neither. Under AIA G704, for example, warranties required by the contract documents start on the date of substantial completion unless other dates are named for them.

Warranties and guarantees 1: All work under the contract

System, product or work covered	All work under the contract
Provider	Brightwater Builders Inc.
Start date, as stated	16 Oct 2026
Length, as stated	1 year, as stated in the contract
Status	Received

Warranties and guarantees 2: HVAC equipment

System, product or work covered	HVAC equipment
Provider	Keystone Mechanical (manufacturer registration)
Start date, as stated	16 Oct 2026
Length, as stated	As stated on the manufacturer registration
Status	To follow

Warranties and guarantees 3: Carpet tile

System, product or work covered	Carpet tile
Provider	Manufacturer, via Tri-County Flooring

Start date, as stated	16 Oct 2026
Length, as stated	15 years, as stated on the warranty
Status	Received
Listed	3
Still to follow	1

5. Handover to the owner

Keys, access cards and codes handed over against a signed key schedule	Done
Contractor access codes, temporary keys and fobs withdrawn or changed	Done
Owner shown where the main shut-offs, isolators and controls are	Done
Attic stock and spare parts handed over, with a signed receipt	Done
Training for the owner's staff given on each system that needs it	Outstanding
What needs doing, or why not checked	Access control training for the practice manager and front desk not given yet. Booked for 29 Oct.

Attic stock and spares handed over 1: Ceiling tiles, 2×2, to match

Item	Ceiling tiles, 2×2, to match
Quantity	2
Where it was left	Level 1 storage room 108
Received by	R. Okonjo

Photo of the stock or the signed receipt



Attic stock and spares handed over 2: Carpet tiles, exam room color

Item	Carpet tiles, exam room color
Quantity	3
Where it was left	Level 1 storage room 108
Received by	R. Okonjo

Attic stock and spares handed over 3: Paint, one gallon of each wall color

Item	Paint, one gallon of each wall color
Quantity	4
Where it was left	Janitor closet 214
Received by	R. Okonjo

Training for the owner's staff 1: Controls or building management system

System	Controls or building management system
Trained by	Keystone Mechanical
Date given	20 Oct 2026
People trained	3
Attendance sheet signed?	Yes

Training for the owner's staff 2: Fire alarm

System	Fire alarm
Trained by	Beacon Fire Systems
Date given	21 Oct 2026
People trained	4
Attendance sheet signed?	Yes
Training sessions	2
Keys, cards and fobs handed over	46

6. Cleaning, demobilisation and reinstatement

Final clean done in every area, including glazing, fixtures, floors and inside cupboards	Acceptable
Waste, surplus materials and packaging removed from site	Action needed
What needs doing, or why not checked	Two cartons of surplus materials left at the end of the level 2 corridor. Remove before the clinic moves in.
Site offices, welfare units, containers and plant removed	Acceptable
Temporary power, water and lighting disconnected and removed	Acceptable
Fencing, hoarding, signs and temporary protection removed	Acceptable
Ground, paving, landscaping and verges reinstated	Not applicable
Neighbouring property and public roads left as found, any damage recorded	Acceptable

Photos of the site as left



7. Final account, retention and lien waivers

Original contract sum	1842000
Approved changes, net	37450
Adjusted contract sum	1879450
Final account	Not yet agreed
Paid to date	1650300
Balance still to pay	229150
Retention held	92100
Retention released so far	46050
Retention still held	46050
Date the rest is due for release, as the contract states	15 Dec 2026

> Lien waiver rules, forms and timing differ from state to state. The form records the waivers you received; it does not say which you need. Check your state's law and your contract.

Lien waivers received 1: Hollis Painting Co.

From	Hollis Painting Co.
Type, as written on the waiver	Conditional waiver on final payment
Amount covered	48200
Covers work through	16 Oct 2026

Lien waivers received 2: Ridgeline Data Systems

From	Ridgeline Data Systems
Type, as written on the waiver	Conditional waiver on final payment
Amount covered	63900
Covers work through	16 Oct 2026
Lien waivers recorded	2
Final lien waivers still to collect	3

8. Lessons learned

Lessons learned 1: Procurement and subcontractors

Topic	Procurement and subcontractors
Went well or to improve	To improve
What happened	Mechanical as-builts were not in the subcontract closeout list, so they arrived late.
What to do on the next project	Put as-builts and O&M manuals in every subcontract with a date.
Who will take it forward	T. Abernathy

Lessons learned 2: Communication with the owner

Topic	Communication with the owner
Went well or to improve	Went well
What happened	Weekly walk with the practice manager from drywall on kept the punch list short.
What to do on the next project	Keep doing it on medical fit-outs.
Who will take it forward	Project manager
Went well	1
To improve	1

9. Closeout status, actions and sign-off

Inspections and final approval	0
Certificates	1

Manuals, drawings, warranties	2
Handover to the owner	1
Site	1
Final account and lien waivers	4
Closeout items outstanding	9
Punch list items still open	4
Closeout status	Closeout open: items outstanding

Actions 1: Send the mechanical as-built drawings.

Action	Send the mechanical as-built drawings.
Priority	Before final payment
Who will do it	Keystone Mechanical
Due by	30 Oct 2026
Status	Open

Actions 2: Give access control training to the practice manager and front desk.

Action	Give access control training to the practice manager and front desk.
Priority	By the agreed date
Who will do it	Ridgeline Data Systems
Due by	29 Oct 2026
Status	Open

Actions 3: Remove the two cartons from the level 2 corridor.

Action	Remove the two cartons from the level 2 corridor.
Priority	Safety: now
Who will do it	T. Abernathy
Due by	24 Oct 2026
Status	In progress

Actions 4: Agree the final account and collect the 3 final lien waivers still due.

Action	Agree the final account and collect the 3 final lien waivers still due.

Priority	Before retention release
Who will do it	Brightwater project manager
Due by	13 Nov 2026
Status	Open
Actions still open	4
Decision	Not closed out: items outstanding
Next closeout review date	6 Nov 2026
Summary for the owner	Certificate of occupancy issued and all inspections passed. Left to close out: 4 punch items, the emergency lighting report, mechanical as-builts, the HVAC warranty registration, access control training, two cartons in the level 2 corridor, the final account and 3 lien waivers.
Contractor project manager name	T. Abernathy
Contractor project manager signature	
Owner or client representative name	R. Okonjo
Owner or client representative signature	

> By signing, both sides agree this is where closeout stands on the review date. It does not change the contract, the warranties, any retention or lien rights, and it is not a building department or building control approval.