

Punch List Items

Walkdowns are performed between Invenergy and the Contractor or Supplier. During each walkdown, the contractor/supplier will use this form in ProjectTeam to record individual punchlist items and notify the team. When the walkdown is complete, the contractor/supplier will submit the punch list to Invenergy for review, Invenergy will submit to the Customer (if applicable) and then inform the Contractor/Supplier to complete the items. Customer will review the completed punch list items and provide sign off.

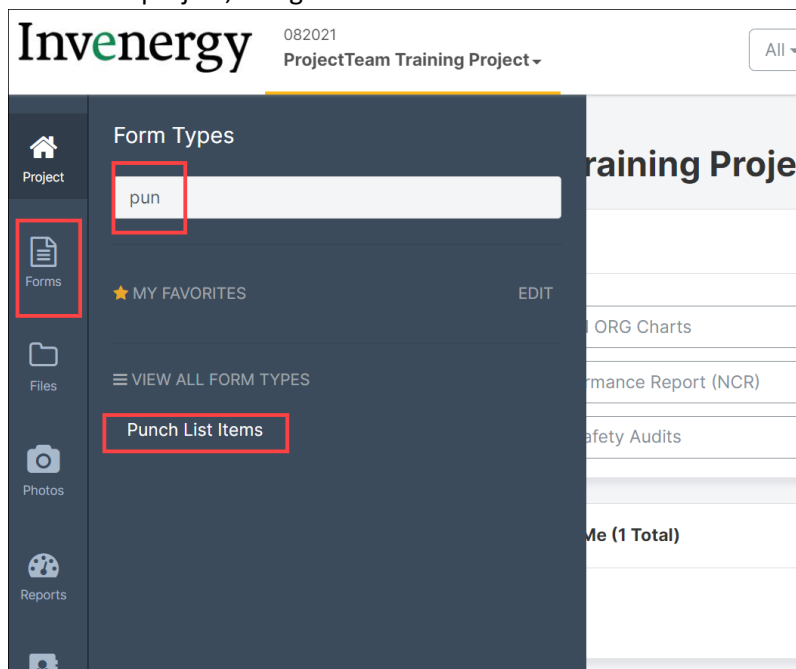
[Creating a Punch List](#)

[Punch List Acknowledgement by Customer](#)

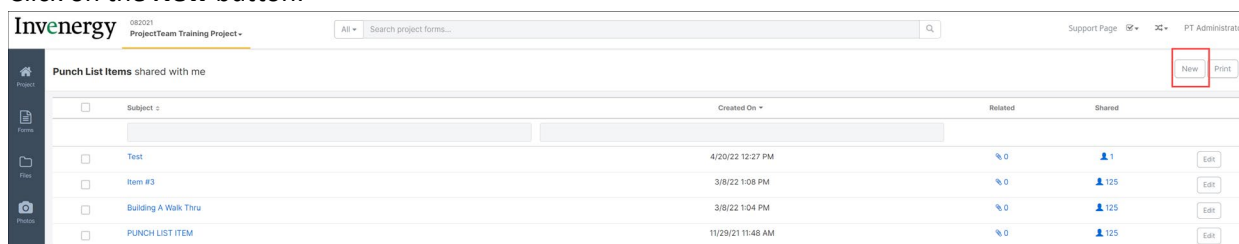
[Punch List Resolution](#)

Creating a Punch List

1. Within the project, navigate to the Punch List form.



2. Click on the **New** button.



3. Fill out the following fields:
 - a. Subject
 - b. Site (select from list, if applicable)
 - c. Item # (click Get Next button)

- d. Date Identified (date of walkthrough)
- e. Identified by Company
- f. Identified by Contact
- g. Responsible Contractor
- h. Reference Drawing/Document

Invenergy D90340 Arizona Sun - AZ Battery Storage Project ▾ All ▾

New Punch List Item

DETAILS

Subject
June 2022 Site Walk with Contractor

Site
Desert Start

Item #:
Get Next 2

Date Identified:
06/06/2022

Identified by (Company):
Invenergy LLC

Identified by (Contact):
Alex Golden

Responsible Contractor
Powin

Reference Drawing / Document:
Type the Reference Drawing / Document:

4. Next you will use the Punch List Information table to record all the items. Click on **Create New**.

New Punch List Item

Identified by (Company):
Invenergy LLC

Identified by (Contact):
Alex Golden

Responsible Contractor
Powin

Reference Drawing / Document:
Type the Reference Drawing / Document:

PUNCH LIST ITEM INFORMATION

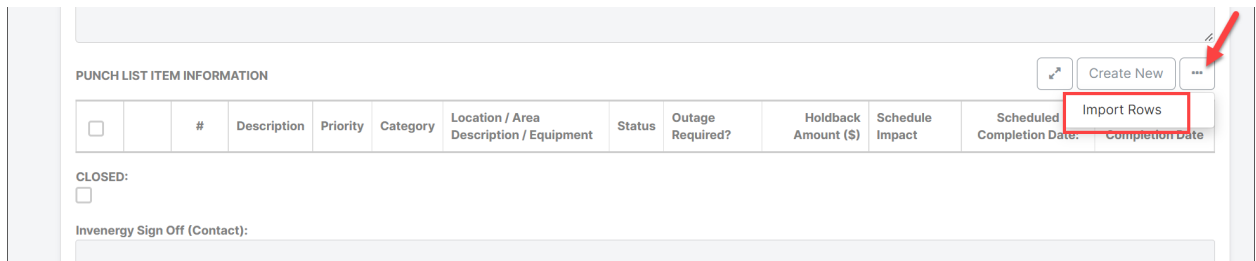
	#	Description	Priority	Category	Location / Area Description / Equipment	Status	Outage Required?	Holdback Amount (\$)	Schedule Impact	Scheduled Completion Date:	Actual Completion Date
<input type="checkbox"/>											

CLOSED:
☐

Invenergy Sign Off (Contact):

[Create New](#)

Note: alternate instruction for importing these rows. Click on the ellipses, then click Import Rows. The first step is to download the .csv file, then populate the file, then import the file.



PUNCH LIST ITEM INFORMATION

	#	Description	Priority	Category	Location / Area Description / Equipment	Status	Outage Required?	Holdback Amount (\$)	Schedule Impact	Scheduled Completion Date:	Completion Date
<input type="checkbox"/>											

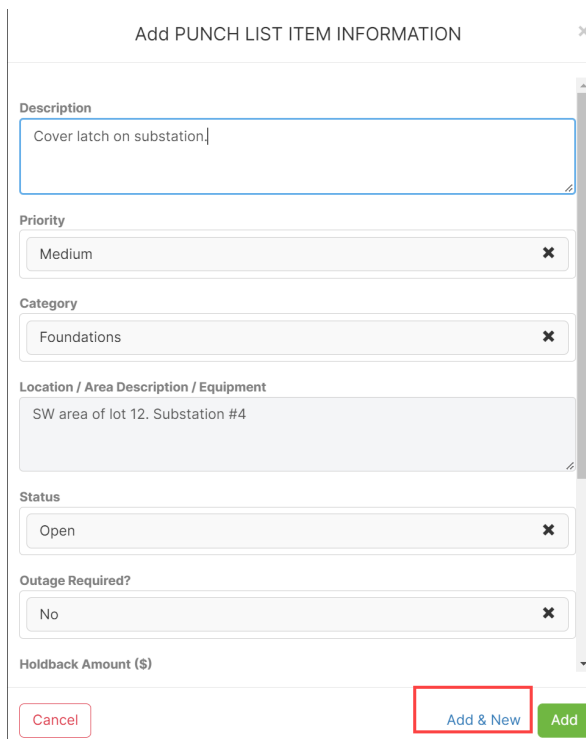
CLOSED:
☐

Invenergy Sign Off (Contact):

Create New

Import Rows

5. Populate all fields:
 - a. **Description**
 - b. **Priority**
 - c. **Category**
 - d. **Location / Area Description / Equipment**
 - e. **Status** (mark Open)
 - f. **Outage Required?** (Yes or No)
 - g. **Holdback Amount**
 - h. **Schedule Impact?** (Yes, No, or TBD)
 - i. **Scheduled Completion Date**
6. Click **Add & New** to record the next item.



Add PUNCH LIST ITEM INFORMATION

Description
Cover latch on substation

Priority
Medium

Category
Foundations

Location / Area Description / Equipment
SW area of lot 12. Substation #4

Status
Open

Outage Required?
No

Holdback Amount (\$)

Cancel Add & New Add

7. When complete, click **Add**.
8. Last, the contractor/supplier will click **Save & Start Workflow**.

Invenergy D90340 Arizona Sun - AZ Battery Storage Project

Search project forms...

Support Page PT Administrator

New Punch List Item

Cancel Save & Start Workflow

DETAILS

Subject Walkdown

Site

Item #:

Get Next

Punch List Acknowledgment by Customer

Invenergy received and reviewed a punch list from the contractor/supplier and submitted the list for review to the Customer. Next actions will be the **Customer** to review the list and, if in agreement, pass the workflow to notify the contractor/supplier to complete the punch list items.

1. Navigate to the punch list.
2. Review the **Punch List Item Information** table.
3. To provide feedback, click on **Take Action**.

Invenergy 08/20/21 ProjectTeam Training Project

Search project forms...

Support Page

Punch List-Contractor requires your action

Step #: 2 (Customer Review)

Due Date: 6/25/22

Take Action View Workflow

Punch List Items

Punch List Item: Building A Walk Thru

Created By Julie Correa (Invenergy LLC) on 3/8/22 at 1:04 PM

Quick Navigation: Details Workflows Attachments Action Items Activity Reference Links

SHARED WITH (128) View All

Share

ACTION ITEMS

Show complete/obsolete items

4. If you accept the list, click **Pass**. This will send a notification to the Contractor/Supplier to remedy the punch list items.

The screenshot shows a modal window titled "Punch List-Contractor". At the top, a yellow banner with a warning icon states: "You are taking action on **Step 2 (Customer Review)**." Below this, under the heading "Your action", there are two radio button options. The first option, "Pass", is selected and is accompanied by the text "Mark as 'Passed' and move forward to the next step". The second option, "Fail", is unselected and is accompanied by the text "Mark as 'Failed' and move back to step:". Below the "Your action" section is a "Notes" section with a text area containing the text "I agree with this list.". At the bottom of the form are two buttons: a red "Cancel" button and a green "Take Action" button.

5. If you do not accept, click **Fail** and pass it back to Invenergy with comments.

This screenshot shows the same "Punch List-Contractor" modal window, but with the "Fail" option selected under "Your action". The text for the "Fail" option now reads "Mark as 'Failed' and move back to step:". Below this text is a dropdown menu that currently displays "1 - Submit to Invenergy". The "Notes" text area now contains the text "Please add the additional items we discussed in today's meeting.". The "Cancel" and "Take Action" buttons remain at the bottom.

Punch List Resolution

When the contractor is complete with the list, they will pass the workflow sending it to Invenergy to validate. Invenergy PM will then complete the workflow to close out the punch list.

1. Navigate to the punch list.
2. Click **Take Action**.

The screenshot displays the Invenergy ProjectTeam Training Project interface. The top header includes the Invenergy logo, the project ID 082021, and the project name 'ProjectTeam Training Project'. A search bar on the right allows searching for project forms. A left sidebar contains navigation icons for Project, Forms, Files, and Photos. The main content area features a green banner for 'Punch List-Contractor requires your action', indicating 'Step #: 4 (Review Punch List Completeness)' with a 'Due Date: 6/25/22'. A red box highlights the 'Take Action' button, with a 'View Workflow' link nearby. Below this, a section titled 'Punch List Items' shows a specific item: 'Punch List Item: Building A Walk Thru', created by Julie Correa (Invenergy LLC) on 3/8/22 at 1:04 PM. A 'Quick Navigation' bar at the bottom provides links to Details, Workflows, Attachments, Action Items, Activity, and Reference Links.

3. Click **Pass** to notify the contractor/supplier and close out the process.