

Policy and Procedures Manual

Equipment Add-Delete-Modification Log

Purpose

- To guide Project Managers through the process of maintaining a log to document and notify Facilities Maintenance when new equipment is installed; old equipment is deleted; and, equipment operation is abandoned in place. To define activities, identify stakeholders and assign responsibilities as it relates to new or demolished or abandoned equipment that supports the suite or building systems and that would typically require annual maintenance from University of Texas at Austin, Facilities Services staff or to prevent work that would void an equipment warranty.

Objective

- Ensure that PM&CS managed projects provide Facilities Services with accurate accounting when equipment is added, deleted through demolition or abandoned in place during the course of project construction so that accurate University records may be maintained of all significant equipment campus wide.

Project Team Member Responsibilities

- The Project Manager (PM) must follow the process as outlined in this document to insure that all major equipment that is added as part of the construction project; deleted or demolished as part of the construction project; or, whose use is abandoned because of the construction project; notifies the Facilities Services office using the Equipment Add-Delete-Modification Log so that current equipment records be maintained; warranty dates established; and, annual maintenance of equipment is properly scheduled.
- PM coordinates with the PSP and Contractor to satisfy activities as described in this procedure. These responsibilities may be delegated to the PSP or other team members. Wherever the term Project Manager is used, it refers to the role, not a position title, thus a PM may be in a Planner position title.
- Professional Service Provider (PSP): Prepares all project designs and specifications including monitoring the project during construction to assure compliance to plans and specifications. Responsible for plan identification of equipment to be demolished and to develop the initial spreadsheet for forwarding on to the contractor for their completion throughout the project construction.
- Construction Coordinator (CC): Review drawings for constructability, act as liaison for contractor (arrange site access, coordinate work throughout the project and provide reports on progress of construction).
- General Contractor (GC): Updates and maintains the Equipment Log with all required information throughout construction and submits the “Equipment Add-Delete Modification Log” when they request the final inspection.

Action by Phase

Design Development Phase

- The PM schedules a kick-off meeting with the PSP and communicates the purpose and intent of the Equipment Add-Delete-Modification Log to the PSP.
- The PM communicates the requirement for the PSP to include an Equipment Schedule, as part of the CD drawings, identifying all equipment that will be demolished or abandoned.
- The equipment information on the DD drawings shall include the equipment number (if tagged), the location, and room number, Description of Equipment; Function or Purpose of Equipment, Manufacturer, Model and Serial Number.

Construction Document Phase

- The PSP must include on the Project CD drawings, or in the specifications, the requirement of the General Contractor to complete the Equipment Add-Delete-Modification Log form provided by the PSP for all equipment demolished or abandoned and this completed form will be submitted with the Close Out documents.
- The PM issues documents to stakeholders for review and written comment. Facilities Services will have five business days (5 business days) from the date on the routing slip to review and provide comments. Facilities Services shall provide 'sign-off' on the form provided at this time.

Proposal Phase

- PM schedules, prepares an agenda and sign in sheet and conducts the Pre-Proposal Conference and invites stakeholders and contractors to attend. Project Close Out requirements for the Contractor to complete the Equipment Add-Delete-Modification Log are discussed in this meeting.

Construction Phase

- PM schedules and conducts Pre-Construction Conference and invites stakeholders, including the zone and Facilities Services staff to attend. Close Out requirements specifically relating to the Add-Delete-Modification Log are discussed.
- Contractor provides submittals, including product data and shop drawings, as outlined in the specifications.
- PM distributes submittals to the stakeholders for review and written comment within 5 business days. Facilities Services shall provide 'sign-off' at this time.
- PM schedules project meetings and includes the Add-Delete-Modification Log as an agenda item for weekly discussion or review.

Close Out Phase

- When the Contractor has completed the project, they must submit the Add-Delete-Modification Log filling in all required spaces on the log for equipment they have Added, Deleted or Abandoned throughout the project as part of the final Close out requirements.
- When the PM is satisfied that all equipment has been accounted for on the log, the PM will forward a copy of the Log to the Facilities Services department for updating the campus wide records (FAMIS). The Log may be submitted either through electronic mail or by hard copy. The PM will then place a copy in the electronic file and forward a copy to the designated person in Facilities Services.

References

- Pre-Construction Conference
- Additional General Conditions of Uniform General Conditions
- Equipment Add-Delete-Modification Log hyperlink:
\\Flint\project_delivery\AE_Standards\Warranty_Phase\Form_Equipment_Add-Delete-Abandoned 8-1.xls

Equipment Add-Delete-Modification Log

The following are examples of University installed equipment that requires reporting when new equipment is added; equipment is abandoned or deleted; or, when modifications to the existing equipment is made. The purpose for reporting this equipment is to assure our routine maintenance records are properly maintained. If your project is installing equipment and you are unsure if it requires inclusion in the log, please contact Facilities Services Division.

General Categories:

All permanent equipment with filters
 Mechanical Equipment
 Domestic Plumbing equipment
 Equipment that heats or cools rooms and buildings

Specific Categories:

Pumps
 Fans
 Hot Water Heaters
 Air Handling Equipment
 Hot Water Generators
 Eyewash and Safety Showers
 Water Filters
 Chill water and Steam or Hot Water supplied Air Handlers
 Window and Package units and Split Refrigerant Systems
 Exhaust Fans
 Stand Alone Clean Room Chillers and Circulating Pumps
 Suspended Heaters, water heaters and hot water generators
 Automatic Doors (ADA and other)
 Cranes and Hoists

Fume hoods must be included on the Equipment Add-Delete-Modification log. Please note the following categories for your log:

- VENT HOOD (Vent Hood)
- FUMEHD DBC (Ducted Bio Cabinet)
- FUMEHD CHH (Chemical Fume Hood)
- FUMEHD RAH (Radioactive Hood)
- FUMEHD PEH (Perchloric Hood)