

	Process Guide: Engineering Management Form	Revision	2
		Approval Date	
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Engineering Management Form

Purpose: This form is used to relay project design criteria. The Owner provides studies, specifications, and other relevant information that define design inputs. The EMF serves to streamline document control and facilitate information transfer to the Contractor and Engineers of Record throughout design kickoff, construction contracting, and construction.

Initiators: Project Engineer, Electrical Engineers, SCADA Engineers, Civil Engineers, Transmission Engineers, Environmental, Vegetation Management, Project Managers, Procurement, Development (on a case-by-case basis)

Department Responsibilities

Project Engineering

The Project Engineer is responsible for managing the initial set-up of the Engineering Management (EM) Form and the set-up Step-by-Step process outlined below. They will then be responsible for managing their relevant forms as dictated by the Contact column in the EM form. Engineers can provide some oversight on other document forms within the EM form, but they are **not** responsible for maintaining the information within is the latest, up to date version.

Project Management

The Project Manager is responsible for all communication between Invenergy and Contractor. The PM should make sure all the latest information in the EM form is incorporated within the Contract.

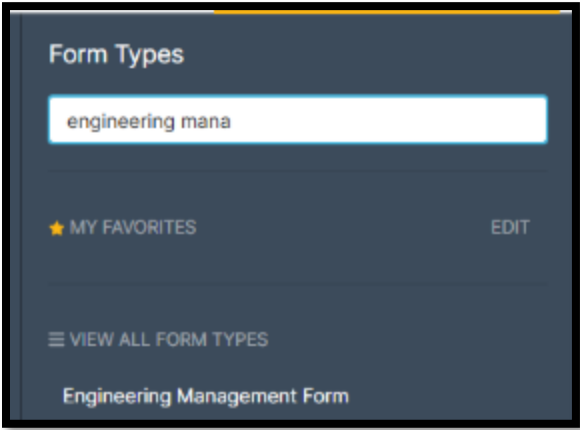
Other Departments

All other departments (Electrical Engineering, Development, ECS, Veg Mgmt., etc.) are responsible for uploading and managing their relevant forms as dictated by the Contact column on the EM form throughout design and construction.

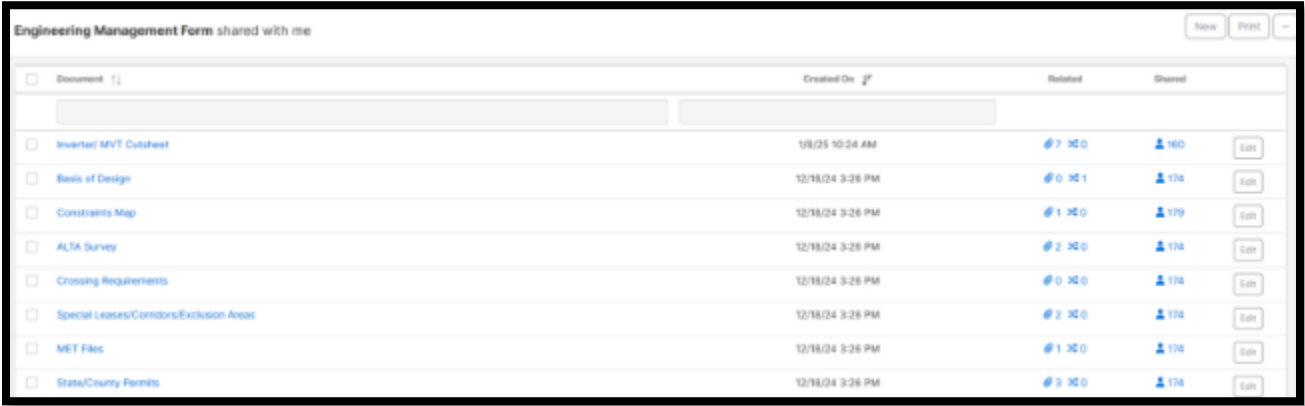
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Navigating to the Engineering Management Form

1. “Within your project’s “Forms,” select the “Engineering Management” form.



2. In the log view, there will be entries for each scope/requirement



3. Select the item to view or share.

Form Fields Breakdown

Engineering Management Form shared with me											
Document #	Category	Document	Document Type	Contract Reference(s)	Date	Revision	Notes	Status	Contact	Created On	Related
1.01	Owner's Criteria	Basis of Design	Contract Document	BOS Contract, Exhibit	3/2/26	1	Refer to SOW if executed.	Ready	Project Engineer	3/16/26 11:19 AM	
1.02	Owner's Criteria	Design Kick Off Meeting Document	Supplemental Information		3/23/26	1	TBD	Review	Project Engineer	3/16/26 11:19 AM	
2.01	Land and Constraints	Constraints Map	Contract Document	BOS Contract, Exhibit	4/13/26	2	Please specify internal or external.	Archive	Project Engineer	3/16/26 11:19 AM	

1. **Document #:** Directly correlates to the Category Section. Leading Number is the Category type, and the decimals are individual entries. Field is used to organize the log if new entries are input throughout construction.
2. **Category:** Composed of general design criteria categories.
3. **Document:** Name of Document(s)

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4. **Document Type:** Document's relation to contractual requirements.
 - **Contract Document:** Document is directly attached as an Exhibit to the Contract
 - **Supplemental Information:** Note related to contract, can be changed without requiring amendments
 - **Informs Contract Documents:** Document isn't attached but directly informs contract exhibits. If this info changes, something inside the contract will change.
5. **Contract Reference(s):** Used to state where this document is listed within a contract and if it is found in multiple contracts.
6. **Date:** Date of documentation itself, not the upload into ProjectTeam date. This should be updated when a document is revised.
7. **Revision:** Revision of the document
8. **Notes:** Any extra notes on the document or action items to communicate between departments.
9. **Status:** Status of the document
 - **Draft:** Document is currently being worked on. Leverage this item for long lead-time items and updating stakeholders on progression of document.
 - **Ready:** Document has been uploaded for the first time into the log, and is ready for be used.
 - **Revision:** Document has been revised from its original upload. A workflow should always be utilized to the designer to alert them of design criteria updates.
 - **Archive:** Document is finalized and ready for document controls to archive into the files. All documents at the end of the project should be progressed to this status.
10. **Contact:** Invenergy Primary Contact for the document. These should be the owner of the documentation and primary user for updating and notifying the contractor of uploads/revisions.

Phase 1: Uploading Engineering Management Form

Phase 1: Initial Documentation batch imported into the form by the Project Engineer and initially utilized for RFP documentation gathering.

1. Project Engineer has an excel per technology for design criteria to deliver to designer(s). Project Engineer works with Invenergy project stakeholders to refine lists for specifications or documentation needed for the specific project.

Note: This excel document is managed by each project engineering technology and stored for access in their share points.

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Document #	Category	Document	Document Type	Contract Reference(s)	Date	Revision	Notes	Status	Contact
1.01	Owner's Criteria	Base of Design	Contract Document				Refer to SOW if executed.		Project Engineer
1.02	Owner's Criteria	Design Kick Off Meeting Document	Supplemental to Contract				TBD		Project Engineer
2.01	Land and Constraints	Constraints Map	Contract Document				Please specify internal or external.		Project Engineer
2.02	Land and Constraints	Constraints Map	Contract Document						Project Engineer
2.03	Land and Constraints	ALTA Survey	Contract Document				Both DWG and PDF		Development
2.04	Land and Constraints	Crossing Requirements	Supplemental to Contract						Development
2.05	Land and Constraints	Special Leases/Corridors/Exclusion Areas	Supplemental to Contract						Development
3.01	Energy	MET Files	Supplemental to Contract						Project Engineer
3.02	Energy	Third Party Loss Studies	Supplemental to Contract						Project Engineer
4.01	Permitting	State/County Permit	Supplemental to Contract				ADD AS NEEDED		Development
4.02	Permitting	Road Use Agreement	Contract Document						Development
4.03	Permitting	County/Township Ordinance	Supplemental to Contract						Development
4.04	Permitting	Permitted Site Road Entrances	Contract Document						Development
4.05	Permitting	Permitted Site Easement	Contract Document				CHANGE AS APPLICABLE (i.e. ODU, etc)		Development
5.01	Interconnection	Interconnection Agreement	Supplemental to Contract				May require redaction		Electrical Engineer
5.02	Interconnection	Facilities Study	Supplemental to Contract						Electrical Engineer
5.03	Interconnection	System Impact Studies	Supplemental to Contract						Electrical Engineer
5.04	Interconnection	Preliminary Model Details	Supplemental to Contract				PSE, PSCAD, etc.		Electrical Engineer
6.01	Environmental	Environmental Spatial Files	Contract Document						Environmental
6.02	Environmental	Environmental Temporal Restrictions	Contract Document						Environmental
6.03	Environmental	Cultural Avoidance Areas	Contract Document						Development
6.04	Environmental	Environmental Restrictions	Contract Document						Development
7.01	Equipment	PANICND Files	Supplemental to Contract						Project Engineer
7.02	Equipment	Module Cutsheet(s)	Contract Document						Procurement
7.03	Equipment	Module Installation Manual(s)	Contract Document						Procurement
7.04	Equipment	Module Design Envelope & Allocation	Contract Document						Procurement
7.05	Equipment	Racking Cutsheet	Contract Document						Procurement
7.06	Equipment	Racking CAD Blocks	Supplemental to Contract						Procurement
7.07	Equipment	Inverter/MVT Cutsheet	Contract Document						Procurement
7.08	Equipment	Inverter Configuration Settings	Supplemental to Contract				PSE, PSCAD, etc.		Procurement
7.09	Equipment	Inverter/MVT Installation Manual	Contract Document						Procurement
7.10	Equipment	MPT Cutsheet	Contract Document						Electrical Engineer
7.11	Equipment	MPT FAT Reports	Supplemental to Contract						Electrical Engineer
7.12	Equipment	HV Breaker Standard Details	Supplemental to Contract						Electrical Engineer
7.13	Equipment	Control Enclosure Standard Details	Supplemental to Contract						Electrical Engineer
7.14	Equipment	SSVT Cutsheet	Supplemental to Contract						Electrical Engineer
8.01	Geotechnical Information	Geotechnical Reports	Contract Document						Project Engineer
8.02	Geotechnical Information	Consolidation Report	Contract Document						Project Engineer
9.01	Topographic Studies	Topographic TIF Contours File	Supplemental to Contract						Project Engineer
9.02	Topographic Studies	Topographic LAS/XYZ File	Supplemental to Contract						Project Engineer
9.03	Topographic Studies	Topographic Report	Supplemental to Contract						Project Engineer
10.01	Civil Design	Hydro SWPPP/AD	Supplemental to Contract						Project Engineer
10.02	Civil Design	Existing Condition Hydrology Report	Supplemental to Contract						Project Engineer
10.03	Civil Design	Proposed Hydrology Report	Supplemental to Contract						Project Engineer

- Once project excel is updated per project requirements after reviewing the Invenergy project stakeholders, the Project Engineer will batch import the form. Select the ellipsis while on the Engineering Management Form on the project and select "Batch Import."

Engineering Management Form shared with me

New Print

Engineering Management Form Log
Configure Log

Batch Import

View Shared With...

Engineering Management Form Form
Customize Form Fields

You have no Engineering Management Form yet

Once you have access to Engineering Management Form, they will show here.

Create New Engineering Management Form

- Select "Upload" under "Import forms" and then select the excel document within your files.

Engineering Management Form > Import

Import Engineering Management Form

- Download template

Download the template CSV file ready for you to fill in.

Download

- Prepare your data

Use the template to fill in all the fields of your forms. There is a maximum of 1,000 rows for each import. Make sure you remove all duplicates before the import, ProjectTeam.com will not automatically remove duplicates. Once you finish, you're ready to upload.

- Import forms

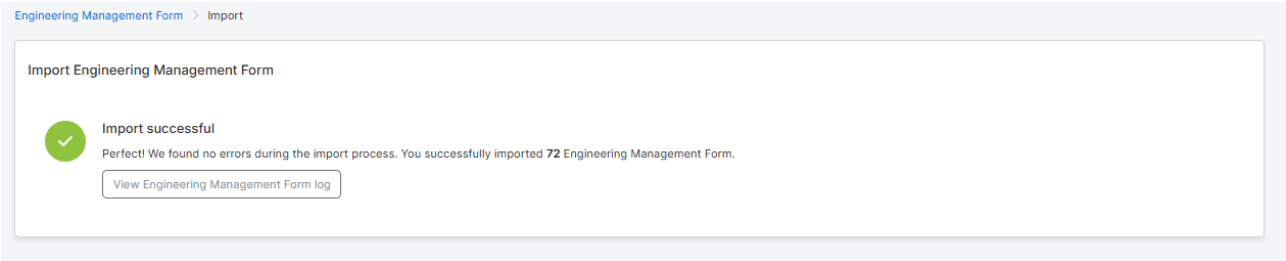
Upload the CSV file into ProjectTeam.com.

Upload

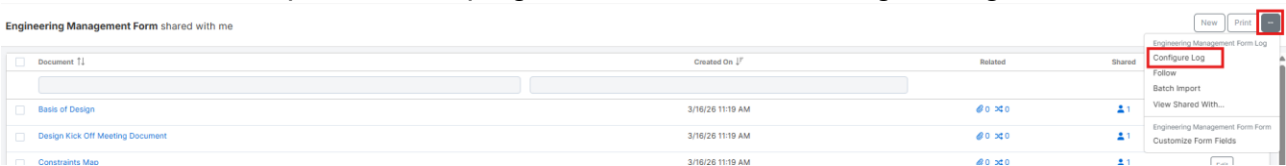
Note: Document must have the same headers and in the same order and must be a CSV (Comma Delimited) (*.csv) file type.

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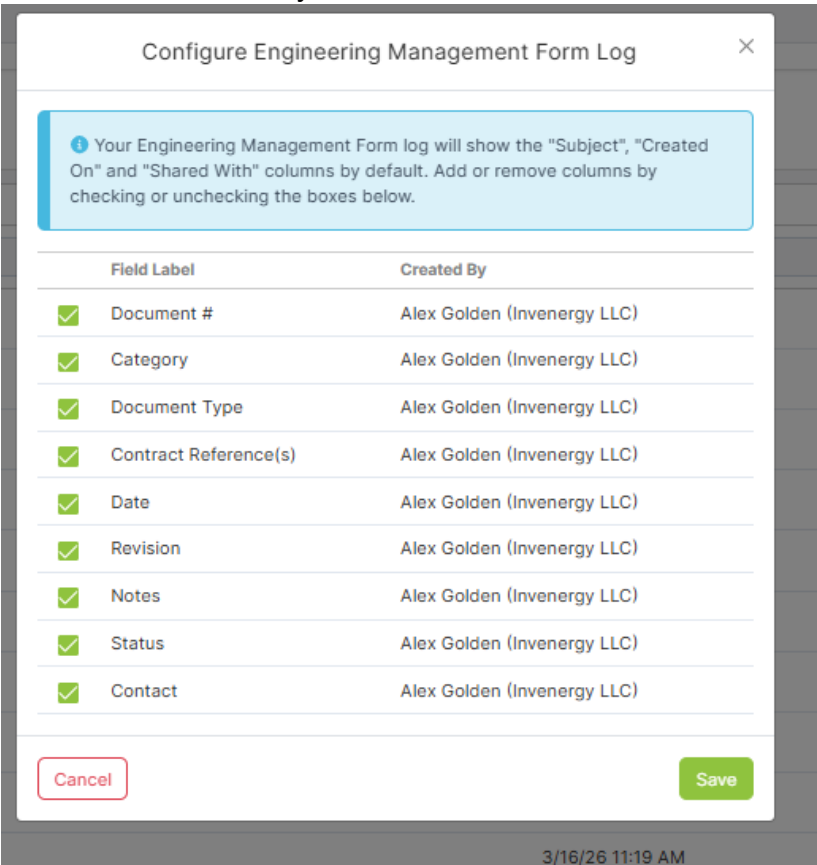
4. A successful upload will appear as below and the log will be populated; unsuccessful uploads will give an error message with the issue of the upload.



5. Next, configure your log to view more fields and be able to organize your log view. Select the ellipsis in the top right and then select "Configure Log".



6. Select the fields and now you can view the Engineering Management Form much more efficiently.



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Engineering Management Form shared with me

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☐	1.01	Owner's Criteria	Basis of Design	Contract Document				Refer to SOW if executed.		Project Engineer	3/16/26 11:19 AM	0 0 0	1
☐	1.02	Owner's Criteria	Design Kick Off Meeting Document	Supplemental Information				TBD		Project Engineer	3/16/26 11:19 AM	0 0 0	1
☐	2.01	Land and Constraints	Constraints Map	Contract Document				Please specify internal or external.		Project Engineer	3/16/26 11:19 AM	0 0 0	1
☐	2.02	Land and Constraints	Constraints Matrix	Contract Document						Project Engineer	3/16/26 11:19 AM	0 0 0	1
☐	2.03	Land and Constraints	ALTA Survey	Contract Document				Both DWG and PDF		Development	3/16/26 11:19 AM	0 0 0	1
☐	2.04	Land and Constraints	Crossing Requirements	Supplemental Information						Development	3/16/26 11:19 AM	0 0 0	1
☐	2.05	Land and Constraints	Special Leases/Corridors/Exclusion Areas	Supplemental Information						Development	3/16/26 11:19 AM	0 0 0	1

7. Once Documents are uploaded into the log, share the documents out with Invenergy Users quickly by selecting the select all box in the log, than share the documents with Invenergy LLC.

Note: The select all box will only select the entries on the page and each page holds 50 entries. If you have multiple pages on the Engineering Management Form, make sure to go to the other pages and share them out as well.

Engineering Management Form shared with me

☒	Document # T1	Category T1	Document T1	Document Type T1	Contract Reference(s) T1	Date T1	Revision T1	Notes T1	Status T1	Contact T1	Created On T1	Related	Shared
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☒	3.01	Energy	MET Files	Supplemental Information						Project Engineer	3/16/26 11:19 AM	0 0 0	1
☒	3.02	Energy	Third Party Loss Studies	Supplemental Information						Project Engineer	3/16/26 11:19 AM	0 0 0	1
☒	4.01	Permitting	State/County Permits	Supplemental Information				ADD AS NEEDED		Development	3/16/26 11:19 AM	0 0 0	1
☒	4.02	Permitting	Road Use Agreement	Contract Document						Development	3/16/26 11:19 AM	0 0 0	1
☒	4.03	Permitting	County/Township Ordinance	Supplemental Information						Development	3/16/26 11:19 AM	0 0 0	1
☒	4.04	Permitting	Permitted Site Road Entrances	Contract Document						Development	3/16/26 11:19 AM	0 0 0	1
☒	4.05	Permitting	Permitted Site Fenceline	Contract Document				CHANGE AS APPLICABLE (LODs, etc)		Development	3/16/26 11:19 AM	0 0 0	1
☒	5.01	Interconnection	Interconnection Agreement	Supplemental Information				May require redaction		Electrical Engineer	3/16/26 11:19 AM	0 0 0	1
☒	5.02	Interconnection	Facilities Study	Supplemental Information						Electrical Engineer	3/16/26 11:19 AM	0 0 0	1
☒	5.03	Interconnection	System Impact Studies	Supplemental Information						Electrical Engineer	3/16/26 11:19 AM	0 0 0	1

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Share Document(s)

☐	Customer, Project Engineer & Project Manager	Invernergy LLC
☐	ECS Leadership: INT	Invernergy LLC
☐	EHS Consultant: EXT	Invernergy LLC
☐	Finance: INT	Invernergy LLC
☐	Foundations Contractor: EXT	Invernergy LLC
☐	Foundations Safety Contractor: EXT	Invernergy LLC
☐	Invernergy Collection Engineer: INT	Invernergy LLC
☐	Invernergy EHS: INT	Invernergy LLC
☐	Invernergy Grid Modeling Engineer: INT	Invernergy LLC
☐	Invernergy Insurance: INT	Invernergy LLC
☐	Invernergy Leadership: INT	Invernergy LLC
☒	Invernergy LLC	Invernergy LLC
☐	Invernergy Site Team: EXT	Invernergy LLC
☐	Mech/Erection Contractor: EXT	Invernergy LLC
☐	NA 5	Invernergy LLC

8. Once the Engineering Management Form log is populated, initiate workflows to stakeholders for documentation required for RFP documentation. You can do this quickly in the log view by selecting the inputs and then selecting the ellipsis in the bottom right and then selecting “Start Workflow”
- Note: This will submit an email for each selected item. Suggest selecting the items that require immediate tracking for uploading purposes.*

Engineering Management Form shared with me

☐	Document #	Category	Document	Document Type	Contract Reference(s)	Date	Revision	Notes	Status	Contact	Created On	Related	Shared
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☒	1.02	Owner's Criteria	Design Kick Off Meeting Document	Supplemental Information				TBD		Project Engineer	3/16/26 11:19 AM	0 0 0	1
☒	2.01	Land and Constraints	Constraints Map	Contract Document				Please specify internal or external.		Project Engineer	3/16/26 11:19 AM	0 0 0	1
☒	2.02	Land and Constraints	Constraints Matrix	Contract Document						Project Engineer	3/16/26 11:19 AM	0 0 0	1
☐	2.03	Land and Constraints	ALTA Survey	Contract Document				Both DWG and PDF		Development	3/16/26 11:19 AM	0 0 0	1
☐	2.04	Land and Constraints	Crossing Requirements	Supplemental Information						Development	3/16/26 11:19 AM	0 0 0	1
☐	2.05	Land and Constraints	Special Leases/Corridors/Exclusion Areas	Supplemental Information						Development	3/16/26 11:19 AM	0 0 0	1
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☐	4.01	Permitting	State/County Permits	Supplemental Information				ADD AS NEEDED		Development	3/16/26 11:19 AM	0 0 0	1
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☐	4.05	Permitting	Permitted Site Fenceline	Contract Document				CHANGE AS APPLICABLE (LDOs, etc)		Development	3/16/26 11:19 AM	0 0 0	1
☐	5.01	Interconnection	Interconnection Agreement	Supplemental Information				May require redaction		Electrical Engineer	3/16/26 11:19 AM	0 0 0	1
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☐	5.03	Interconnection	System Impact Studies	Supplemental Information						Electrical Engineer	3/16/26 11:19 AM	0 0 0	1

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Phase 2: Uploading, Revising, and Delivering Design Criteria to Designers

Phase 2: Contractors are now in the system post BOS/BOP contract execution. Form is utilized to give the EPC contractor/designers design criteria and notify them when revisions are done on these documents. This form should be used as the most up-to-date documentation the designers should be utilizing for Invenergy design criteria documentation, but this form is not utilized for reviews.

- Once BOS/BOP Contractor and designer(s) are in the project, share the documentation with them utilizing the mass share feature or share specific documentation as needed.

Engineering Management Form shared with me

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1.02	Owner's Criteria	Design Kick Off Meeting Document	Supplemental Information				TBD		Project Engineer	3/16/26 11:19 AM		1
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2.02	Land and Constraints	Constraints Matrix	Contract Document						Project Engineer	3/16/26 11:19 AM		1
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2.04	Land and Constraints	Crossing Requirements	Supplemental Information						Development	3/16/26 11:19 AM		1
2.05	Land and Constraints	Special Leases/Conditions/Exclusion Areas	Supplemental Information						Development	3/16/26 11:19 AM		1
3.01	Energy	MET Files	Supplemental Information						Project Engineer	3/16/26 11:19 AM		1
3.02	Energy	Third Party Loss Studies	Supplemental Information						Project Engineer	3/16/26 11:19 AM		1
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5.03	Interconnection	System Impact Studies	Supplemental Information						Electrical Engineer	3/16/26 11:19 AM		1

Share Document(s)

EOR

Apply distribution lists

Name	Created By
(WF) Civil EOR: EXT	Invenergy LLC
(WF) Collections EOR: EXT	Invenergy LLC
(WF) Foundations EOR: EXT	Invenergy LLC
(WF) Mech/Erection EOR: EXT	Invenergy LLC
(WF) O&M - EOR: EXT	Invenergy LLC
(WF) Substation EOR: EXT	Invenergy LLC
(WF) Transmission - EOR: EXT	Invenergy LLC

Users

Name	Company
------	---------

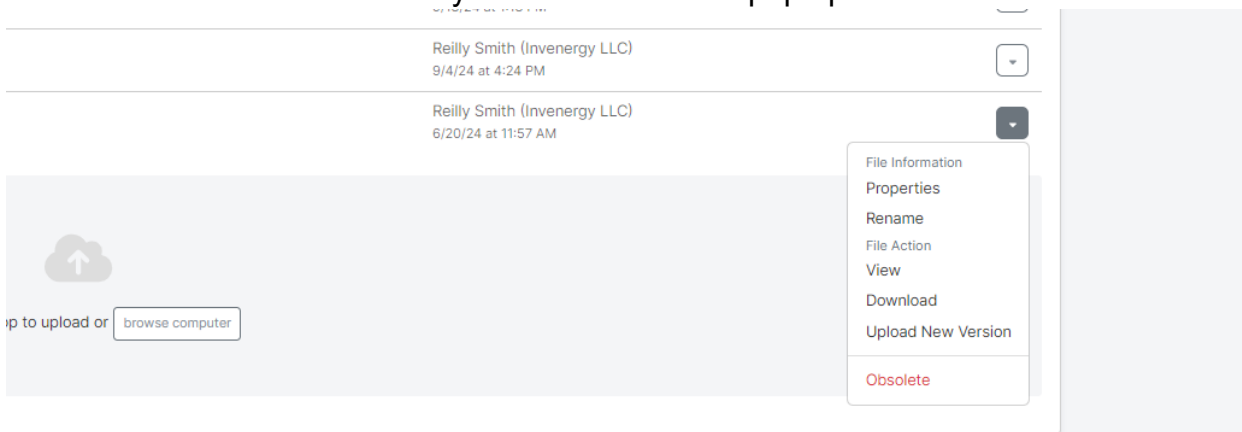
Cancel Share

- Any documentation requiring immediate notification can utilize a workflow to notify the external parties of their access to the documentation.

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Revisions

1. To upload a new version of a document within the attachment of a document form, click the arrow to the right of the document and then Upload New Version. Select the new document version and you should see a vX pop up next to the document name.



Note: If the new document is not a new version of an existing attachment, upload as normal.

2. Documentation that is revised should always be adjusted in the status field to "Revision" and a workflow should be sent to the appropriate external parties.

Engineering Management Form shared with me

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3. It is good practice after starting the workflow, to then tag the receiving party in the Comments section and explain the changes that were made.
4. Contractor should then close out the workflow to acknowledge that they received the new document/information.

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Design Criteria Noted in Engineering Management Form that require review with 3rd Parties

The purpose of the Engineering Management Form is to maintain a single source of truth for Invenergy's design criteria documentation throughout construction. Design criteria documentation that requires review, such as information found within submittals or engineering studies, should not be duplicated and stored in multiple locations. Instead, it should be linked to ensure consistent version control and prevent discrepancies between documents.

1. If a document is being reviewed in another form, utilize the Reference Link capability within ProjectTeam. Go into the Engineering Management Form entry and then select "New" in the Reference Link Section and "Add Existing."

The screenshot shows the 'Engineering Management Form' interface. The title is 'Engineering Management Form: Third Party Loss Studies', created by Alex Golden (Invenergy LLC) on 3/16/26 at 11:19 AM. The 'Quick Navigation' bar includes Details, Workflows, Attachments, Action Items, Activity, and Reference Links. The 'DETAILS' section on the left shows document information: Document # 3.02, Category Energy, Document Third Party Loss Studies, Document Type Supplemental Information, Contract Reference(s), Date 3/16/26, Revision 2, Notes, Status Revision, Contact Project Engineer. The 'REFERENCE LINKS' section on the right has a 'New' button and a 'Create New' button. The 'Add Existing' button is highlighted with a red box.

2. Search for the documentation found in another form and select it. Then select Add.

The screenshot shows the 'Add Reference Links' dialog box. A search bar at the top contains 'Third Party Loss Studies'. Below the search bar is a table with columns: Type, Subject, Created By, and Created On. The table contains one entry: Type Engineering Studies, Subject Third Party Loss Studies, Created By Alex Golden (Invenergy LLC), and Created On 3/16/26 at 11:54 AM. The 'Add' button is highlighted with a red box.

3. Now the Engineering Management Form can be used as a resource to route them to the documentation without having to update the document in 2 places.

	Process Guide: Engineering Management Form	Revision	2
		Approval Date	
		Implementation Date	

Engineering Management Form
Engineering Management Form: Third Party Loss Studies
Created By Alex Golden (Invenio) LLC on 3/16/26 at 11:19 AM

Quick Navigation: Details Workflows Attachments Action Items Activity Reference Links

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DETAILS

Document #
3.02

Category
Energy

Document
Third Party Loss Studies

Document Type
Supplemental Information

Contract Reference(s)

Date
3/16/26

Revision
2

Notes

Status
Revision

Contact
Project Engineer

WORKFLOWS

ACTION ITEMS

Activity

Comments

Add @ to force a notification to users

Make Private Post

No comments added to this document yet.
Be the first to comment.

REFERENCE LINKS

Search...

ENGINEERING STUDIES

Third Party Loss Studies
Engineering Studies

Engineering Management Form and Document Controls

Document Controls team will assess the status fields within the Engineering Management Form. Once assessed that the forms have been officially completed and marked as **Archive**, the Document Controls team will assign a Document ID and transfer all form attachments to the appropriate folder location within the “Files” section of Project Team. The final resting place of each attachment will be within the 02 Development to Construction handoff location and assigned a folder naming convention matching the Engineering Management Form submission to ensure consistency.

Example of file path to where the Engineering Management Form submissions will be stored upon **Archive** status: (Document Controls will move attachments, this is for awareness of final storage location)

“Files” Section -> 02 Dev to Construction -> XX Eng. Mgmt. Form -> “Eng. Mgmt. Form Title”