

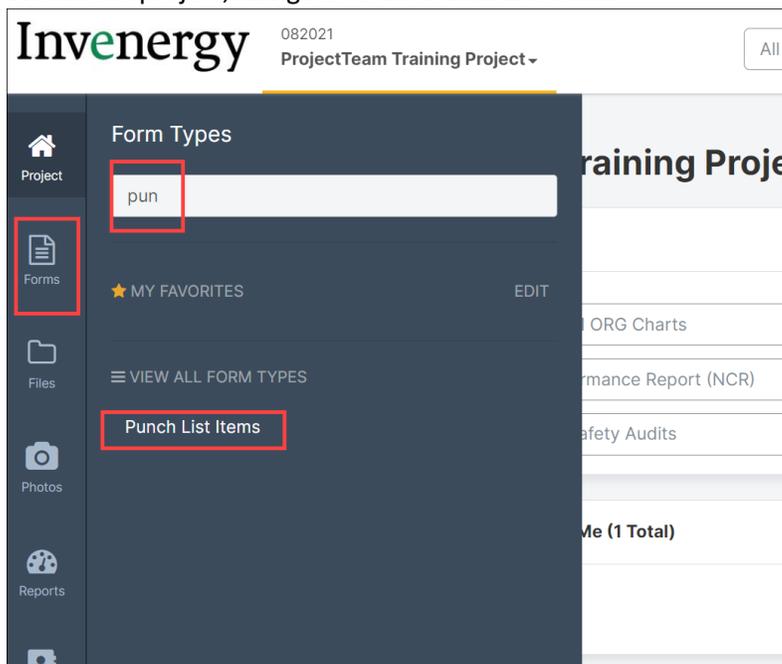
## Punch List Items

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.

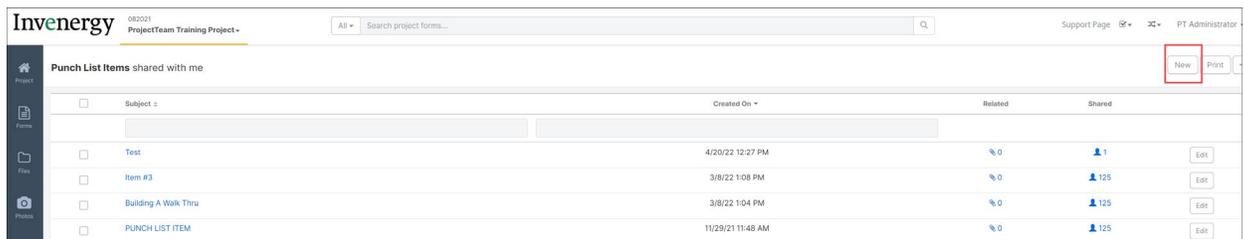
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### Creating a Punch List

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

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

Invenergy Sign Off Date:

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):

Buttons: Create New, Import Rows (highlighted), ...

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

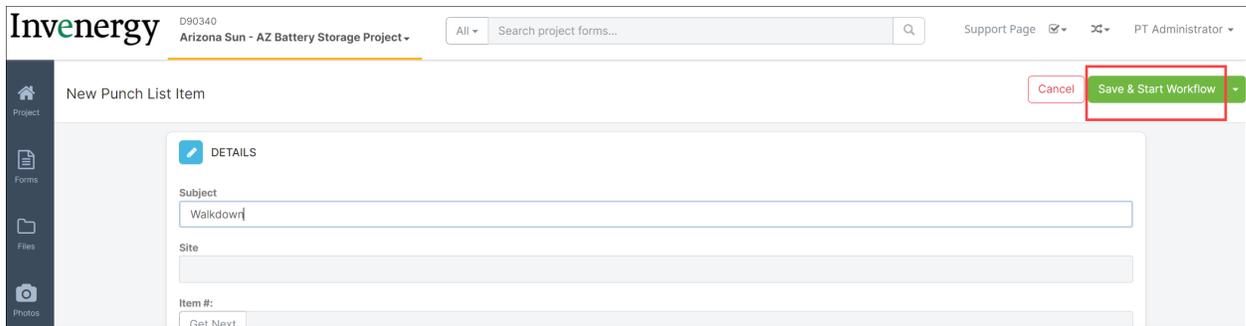
Status: Open

Outage Required?: No

Holdback Amount (\$):

Buttons: Cancel, Add & New (highlighted), Add

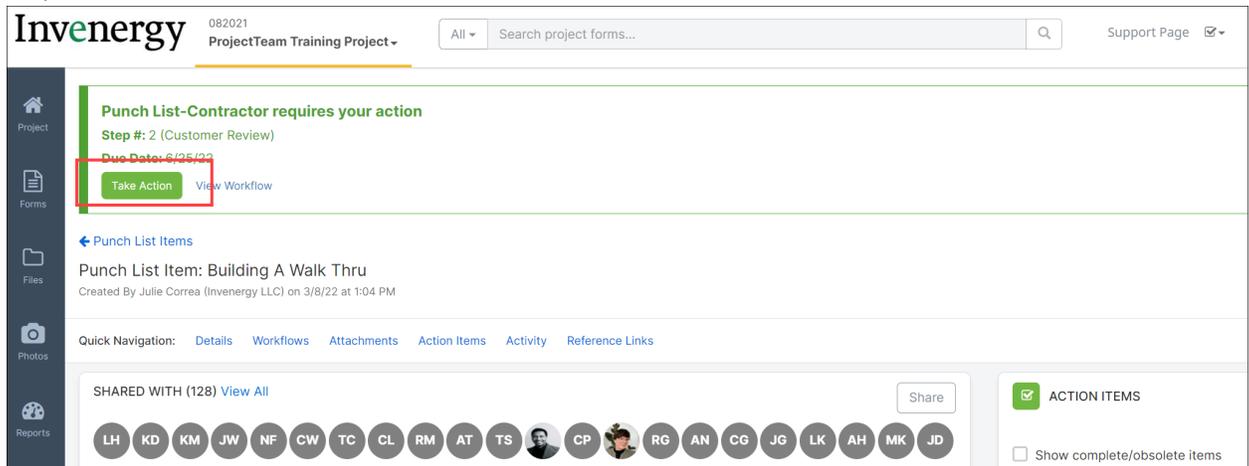
7. When complete, click **Add**.
8. Last, the contractor/supplier will click **Save & Start Workflow**.



## 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**.



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

Punch List-Contractor

⚠ You are taking action on **Step 2 (Customer Review)**.

Your action

**Pass**  
Mark as "Passed" and move forward to the next step

**Fail**  
Mark as "Failed" and move back to step:

Notes

I agree with this list.

Cancel Take Action

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

Punch List-Contractor

⚠ You are taking action on **Step 2 (Customer Review)**.

Your action

**Pass**  
Mark as "Passed" and move forward to the next step

**Fail**  
Mark as "Failed" and move back to step:

1 - Submit to Invenergy

Notes

Please add the additional items we discussed in today's meeting.

Cancel Take Action

## 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 shows the Invenergy ProjectTeam Training Project interface. At the top left is the Invenergy logo. To its right is the project ID '082021' and the project name 'ProjectTeam Training Project'. A search bar contains the text 'Search project forms...'. A left-hand navigation menu includes icons for Project, Forms, Files, and Photos. The main content area features a green header for a 'Punch List-Contractor requires your action'. Below this, it specifies 'Step #: 4 (Review Punch List Completeness)' and a 'Due Date: 6/25/22'. A green 'Take Action' button is highlighted with a red box, with a 'View Workflow' link next to it. Below the header is a section for 'Punch List Items' with a left-pointing arrow. The first item is 'Punch List Item: Building A Walk Thru', created by Julie Correa on 3/8/22 at 1:04 PM. A 'Quick Navigation' bar at the bottom of the section includes links for Details, Workflows, Attachments, Action Items, Activity, and Reference Links.

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