

# Incremental Projects Logbook Training

**Instructor:** \_\_\_\_\_

**Date:** \_\_\_\_\_

“Incremental projects, while infrequent, represent a disproportionate amount of FDD fees. FDD is required by regulation to accept, process and administrate incremental projects. FDD has no consistent method for coordinating the review, observation and administration of incremental projects. If a process were in place, it would encourage more use of the incremental construction process.”

—John Donelan (2002)

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## **I-Project Business Rules**

- ◆ Title 24, Part 1 Section 7-131 allows for the Incremental Design, Bidding and Construction of one hospital building. Multiple buildings require separate projects.
- ◆ I-Projects will be numbered like G projects, I-Master will have a sub of zero (0), and subs will be numbered sequentially beginning at one (1).
- ◆ Multiple I-Masters are allowed at the same time on one facility.
- ◆ An I-Sub cannot be created without an existing active I-Master. If an attempt is made to create an I-sub for a facility where there is no I-master, you will be prompted that you must create an I-Master first. This is different from G projects where the master is automatically created for you.
- ◆ Once an I project is created there is no way for the computer to change the project from an I to an H or S or vice versa.
- ◆ Different scopes will be allowed for I-Masters and all I-sub.
- ◆ Different designers will be allowed on each sub and the master.
- ◆ The default 'Kind' for I-projects will be N-New Health Facility.
- ◆ Use of Reserved project numbers will only be available on I-Masters.
- ◆ Deficiencies Mitigated for SB1953 related I-Projects (Part J info) shall be entered only from I-Master.
- ◆ All project costs for I-Projects will be tracked on the I-Master.
- ◆ Final Verified Compliance Reports will only be required for the subs.
- ◆ An I-Project will be billed at 70% of the final filing fee until project completion.

## Creating a Project

- ◆ To add an I-project, select either 'I' or 'I-sub' from the Project Class field.
- ◆ The Plan Review Code field has been modified to ensure the cost code corresponds to the Plan Review code. For example; If a 321 Plan Review code is selected, the 321 cost code is also selected for you. The same functionality is applied to the 330 Plan review activity code, all other activity codes default to the 331 cost code. You are allowed to change the cost code manually if you need to.
- ◆

### I-Master

When creating an I-Master, the Plan Review Code field will default to blank and the list will only contain the 321 or 330 review codes.



**YOU DO NOT HAVE TO ENTER A REVIEW CODE FOR I-MASTERS.**

The same fields are required as for S and H projects with the exception of the 'Plan Review Code' field. The Plan Review Code drop-down list for I-masters only contains Blank (default), 321, and 330.

### I-Sub (Increment)

After I-Sub is selected from the Project Class list, the following fields will disappear: Kind, Cost Estimate section, Part J and Use Reserved Project number checkboxes. These items disappear because they are only tracked on the I-Master. All other requirements remain for I-sub with the exception that the 330 activity code is removed from the Plan Review Code drop-down list; GeoTech reviews are only entered on the I-Master.

- \* *When adding an I-Sub to a facility with more than 1 master, the user will be prompted to select which I-Master the new sub should be created under.*
- \* *When adding an I-Sub to an I-Master that already has a Plan Approval date and/or a field accepted date and/or a closure status, the users intentions will be confirmed with a prompt, if OK, the computer will clear the plan approval date and field accepted date from the I-master and any closure statuses other than 'CANC' and then the I-Sub will be created.*

## Project Info screen

### I-Masters

Build Permit milestone field is not shown (same for all screens).

Field Accepted date is only populated when all subs have received a field accepted date, then the most current field accepted date is copied to the I-master.

Part J information may be entered.

All other functions are the same as for S and H projects.

The screenshot shows the 'Project Info' screen for an I-Master project. The window title is 'DB2 TEST - FDD LogBook Program - Version: 435 ACTIVE'. The menu bar includes 'File', 'View', 'Reports', 'Utilities', and 'About'. The main area contains the following fields and controls:

- Project: IL020836 - 0 Cnty: 19A Facno: 13333 Kind: N Facility: HENRY MAYO NEWHALL MEMORIAL HOSPI
- Status: OPEN Scope: REPLACEMENT FACILITY
- Date In: 8/2/02 Appr Ltr: 9/20/02 Field Accepted: Date Closed: 9/25/02
- PT: NMR DSE: JJL RCD: GXO Region: NLA Save
- ACD: AJT FLSO: SMH Arch: GSR Category: AddView Part J Info
- Kind: N SB1953 Construction Project? Y <-SET
- Scope: REPLACEMENT FACILITY
- Items Received:
 

<input type="checkbox"/>	Part J	<input type="checkbox"/>	Building Permit Form
1	Application for Plan Review	0	Inspector Qualification Form
2	Letter of Authorization	0	Contract Information
3	Sets of Plans	0	Certification of Insurance
0	Demolition Plans	0	GeoTech
0	Sets of Specifications		
0	Structural Calculations	Other	
0	TIO Program		

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### I-sub

Date closed milestone is populated from I master except when sub has a 'CANC' status & date (same for all screens).

'SB1953 Construction Project?' field will be populated from the I master. The '<-SET' button will not be shown.

'Part J' check box will be populated from I master and only changeable on I master.

Part J information will be view only when accessed from an I-Sub project.

The screenshot shows the 'Project Info' screen for an I-Sub project. The window title is 'DB2 TEST - FDD LogBook Program - Version: 435 ACTIVE'. The menu bar includes 'File', 'View', 'Reports', 'Utilities', and 'About'. The main area contains the following fields and controls:

- Project: IL020836 - 2 Cnty: 19A Facno: 13333 Kind: N Facility: HENRY MAYO NEWHALL MEMORIAL HOSPI
- Status: OPEN Scope: FOUNDATION AND FRAME - TESTTESTEST
- Date In: 8/19/02 Appr Ltr: 8/19/02 Build Permit: 8/27/02 Field Accepted: 9/9/02 Date Closed:
- PT: NMR DSE: JJL RCD: GXO Region: NLA Save
- ACD: AJT FLSO: SMH Arch: GSR Category: AddView Part J Info
- Kind: N SB1953 Construction Project? Y
- Scope: FOUNDATION AND FRAME - TESTTESTEST
- Items Received:
 

<input type="checkbox"/>	Part J	<input type="checkbox"/>	Building Permit Form
0	Application for Plan Review	0	Inspector Qualification Form
0	Letter of Authorization	0	Contract Information
0	Sets of Plans	0	Certification of Insurance
0	Demolition Plans	0	GeoTech
0	Sets of Specifications		
0	Structural Calculations	Other	
0	TIO Program		

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## Review screen

### I-Masters

When adding a review to an I-Master, activity codes will be limited to the following:

ACT	Description
230	Program Flexibility
321	Preliminary Review
322	Preliminary Review -
330	Geotech Report
350	Stamping full set of
351	Approval of plans for
361	Post Approval
362	Post Approval
367	Post Approval
461	Field Post Approval

The process to enter reviews and review information has not been changed. Additionally, review goals for I-projects are the same goals as those for H-projects.

No activity codes on I-masters will generate a plan approval date.

### I-Subs

When adding a review, activity codes will be limited to the following:

ACT	Description
150	Quality Assurance Plan
155	Quality Assurance Field
230	Program Flexibility
301	Pre-Design Review
325	Triage
331	First Final Review
332	First Final Review - OTC
335	Standard Review
336	Standard Review (All
337	Contracted Out Review
341	Backcheck Review
342	Backcheck Review -
345	Backcheck Review
346	Backcheck Review-All
347	Backcheck
371	TIO Plan Review
410	Field Oversight - Sight
425	Field Triage
431	Field Initial Plan Review
441	Field Backcheck Plan
471	TIO Field Review

The process to enter reviews and review information has not been changed. Additionally, review goals for I-projects are the same goals as those for H-projects.

When a plan approval date is generated for a sub, Logbook will check to see if all other subs have a plan approval date. If all subs do have a plan approval date the logbook will ask you if you want to generate a 'Master Plan Approval Date' which will enter the most recent plan approval date on the I-Master project. Immediately following this it will ask you if you want to print the 'Master Plan Approval Letter'.

\* There is no difference in a Master Plan Approval letter and a Sub Plan Approval letter other than the project number at the top of the letter.

## Construction screen

- ◆ The Zip code field for the IOR has been replaced with the first and last name of the IOR.
- ◆ The 'ACO Field Visit Log' has been renamed 'Field Staff Report Log.'

## I-Masters

All fields related to the Building Permit, TIO program and IOR are removed.

Plan Review Approval Letter and Plan Approval Type are populated from the last sub to receive plan approval.

- \* You may remove the plan approval type and date from the I-Master from this screen. To reset the I-Master Plan approval type and date, you would have to re-generate plan approval on a sub.

Construction started is populated from the first sub to receive a construction started date.

The Field Staff Report Log is replaced with a view-only grid that will display the most recent construction percentage from each increment entitled 'Sub Construction Status.'

SubNum	Date	Percent Done
2	9/9/02	100
3	8/27/02	100
4		

## I-Subs

If an I-master has a Plan approval date and type, and it is cleared from a sub, the I-master plan approval date and type will also be cleared.

The 'ACO Field Visit Log' has been renamed 'Field Staff Report Log.'

- \* Disciplines other than the ACO still must not exceed the ACO's percentage.

DSE Required checkbox is active for subs only. All other functions are unchanged.

INI	Date	Percent Done
AJT	1/1/02	5
AJT	8/29/02	90
AJT	9/9/02	100

## Closure screen

### I-Masters

Final verified compliance reports are not required for an I-Master and therefore are not shown.

The first and final request letters will request final verified cost and will also list by I-sub on a separate sheet, the verified reports missing for that sub.

You will not be able to close an I-master with compliance without a 499 and all subs having all required Final Verified Compliance Reports.

Date	ACT	Cost Est	Rad Cost	Remark
8/2/02	331	\$65,000,000.00	\$0.00	
8/20/02	499	\$65,000,000.00	\$0.00	

### I-Subs

The cost grid is not shown, cost is only tracked on the I-master.

The first and final request letters will ONLY request submission of final verified compliance reports for that sub and will not mention cost information.

The only closure statuses that are selectable are 'CANC' or 'OPEN'. All other statuses are allowed only when copied from the I-master by the Logbook program.

If the I-Master status has any closure status other than OPEN, the status and date closed are not editable.

The only closure letter that can be printed for a sub is the Cancelled letter and it can only be printed if the closure status is 'CANC'.

With the exception of the rules above, Date Closed and Status will be populated from the I-Master

	License	Zip	Date		Date	Date
Architect	C00820	93001	8/20/02	Plan Approval	8/19/02	Request Letter 1/1/02
Mechanical				Building Permit	8/27/02	Request Letter 3/1/02
Electrical				Constr Start	9/15/02	Date Closed
Structural				Field Accepted	9/9/02	Status OPEN
GOR						
Contractor/ Ownr Bldr			8/20/02			
IOR	A10019	95436	8/20/02			

## Closure Reports

### Reports ▶ Closure Reports

First and Second Letter Reports will check both I-Master and I-sub projects.

*\*The cost fields for I-sub projects will show 0's since no cost is tracked on I-sub projects.*

Overdue and eligible reports will exclude all I projects.

New I-project Overdue and Eligible report will be run for closure of I-projects.

The screenshot shows a software dialog box titled "Closure Reports". It features a "Report Type" section with six radio button options: "First Letters" (which is selected), "OverDue", "I-Project OverDue", "Second Letters", "Eligible for Closure", and "I- Project Eligible for Closure". To the right of these options is a dropdown menu labeled "Select Program Technician or ALL" with "ALL" selected. Below the dropdown, the text "Filename of Selected Report: close11.rpt" is displayed. At the bottom of the dialog are two buttons: "Run Report" and "Cancel/Done".

### Reports ▶ Other Reports

New I-sub project report, similar to existing G-sub project report. This report lists general information about the I-Master information and each sub.

## Notes