

# TIO Logbook Training Handout

DB2 TEST - FDD LogBook Program - Version: 428

File View Reports Utilities About

TimeSheet Project Info Review Construction Closure License 0 Memos 0 Facility

Pick Date Initials BMR Date 2/19/02 Day Tuesday Hours 0.00

Last Rutschmann First Brandon Title Staff Services Analyst Region

Print Weekly TimeSheet Save/Recalc

ACT	ProjNum	Sub	PAD	HRS	REMARK
*					

Network User: BRUTSCHM 2/19/02 2:59 PM

## Timesheet

Added 371 activity code, "TIO Plan Review"  
Added 471 activity code, "TIO Field Review"

Time spent reviewing the TIO program must be tracked separately from time spent reviewing plans. The two times must be tracked separately to determine the impact, if any, reviewing the TIO program will have on schedules, 60-30-30, etc.

frmNewProject - OSHPD/FDD Logbook - Create a New Project - version: 428

Facility Number   Facility Name  County  Date In  Project Status

Project Class  Office  Sub  Cat  Kind  Before (Beds)  After  ACO  Mgr

Scope  Plan Review Code

Cost Estimate Activity Code  Construction Cost  Radiology Cost  Remark

Licenses - Select Responsible Person

Architect  Mechanical  Electrical  Structural  Contractor\Owner Builder

GOR   IOR#->   LADR#->

Inventory of Items Received

Plan Review App.  Structural Calcs.  Certification of Insurance  Use Reserved Project number

Authorization Letter  TIO Program  Geo-Tech  Part J

Sets of Plans  Building Permit Form Other:

Demolition Plans  Inspector Qualification Form

Sets of Specifications  Contract Information

SB1953 Const Project

## Create New Project

In the Licenses section, a Geotech field has been added.

In the Inventory section, "Test and Inspec. Form" has been renamed to "TIO Program".

Note: Any data entered in the old Test and Inspec. Form field will be shown in the new TIO Program field.

**DB2 TEST - FDD LogBook Program - Version: 428 ACTIVE**

File View Reports Utilities About

TimeSheet **Project Info** Review Construction Closure License 3 Memos 3 Facility

Project HL011192 - 0 Cnty 19A Facno 13333 Kind R Facility HENRY MAYO NEWHALL MEMORIAL HOSPI

Status CLSD Scope SB 1953 RELATED CONST PROJ-PLACE TO EDIT/CHANGE SCOPE

Date In 9/5/01 Appr Ltr 1/24/02 Build Permit 1/24/02 Field Accepted 1/24/02 Date Closed 1/24/02

PT NMR DSE HXC RCD GXO Region NLA **Save** SB1953 Review Project # RR000408

ACD AJT FLSO SMH Arch GSR Category F **Add/View Part J Info**

Kind R SB1953 Construction Project? Y <-SET

Scope SB 1953 RELATED CONST PROJ-PLACE TO EDIT/CHANGE SCOPE

Items Received	<input checked="" type="checkbox"/>	Part J	0	Building Permit Form
	<input type="checkbox"/>	Application for Plan Review	0	Inspector Qualification Form
	<input type="checkbox"/>	Letter of Authorization	0	Contract Information
	<input type="checkbox"/>	Sets of Plans	0	Certification of Insurance
	<input type="checkbox"/>	Demolition Plans	0	GeoTech
	<input type="checkbox"/>	Sets of Specifications		
	<input type="checkbox"/>	Structural Calculations		
	<input type="checkbox"/>	TIO Program		
		Other	RECD CHECK FOR \$250.00	

Network User: BRUTSCHM 2/6/02 10:45 AM

## Project Info

In the items received section, "Test and Inspec. Form" has been renamed to "TIO Program".

Note: Any data entered in the old Test and Inspec. Form field will be shown in the new TIO Program field.

**DB2 TEST - FDD LogBook Program - Version: 427 ACTIVE**

File View Reports Utilities About

TimeSheet Project Info **Review** Construction Closure License 3 Memos 0 Facility

Project SS999999 - 0 Cnty 00 Facno 00000 Kind R Facility No Facility - Test

Status OPEN Scope TEST PROJECT "DOUBLE QUOTE" ABAMBAM

Date In 5/12/97 Appr Ltr 10/5/01 Build Permit 8/17/01 Field Accepted Date Closed 11/28/01

Records: Delete

ACT	PAD	BCK	INC	MGR	MGRI	MGRO	LT	A	A-in	A-out	AR	M	M-in	M-out	MR	E
300	0			BCK	12/26/99	7/24/01	DT	BLN	12/26/99	26/99	D	X				X
300	0			BCK	10/20/00	1/1/01	AP	NW/W	1/24/01	1/4/01	A	BCK	3/4/01	9/13/01	A	GA
321	0			BAM	6/12/01	6/12/01	RT	BAM	1/12/01	12/01	A	BCK	1/22/01	8/22/01	A	BC
325	0			GAD	8/28/01	9/13/01	RT	GAD				RJJ				D
331	0			BAM	8/13/01	8/28/01	RT	GAD	1/23/01	23/01	A	BFB	1/1/00	1/3/00	C	BM
331	0			GAD	8/28/01	9/4/01	AP	X			D	BAM	3/4/01	9/4/01	A	X
341	0	01	01	GAD	9/13/00	9/15/00	AP	XXX	1/13/00	14/00	A					

MGR

Ini BCK Days 576 Arch BLN Mech X Elec X Stru X FLSO X

Act 300 In 12/26/99 In 12/26/99

Ave 2/24/00 Out 7/24/01 Out 12/26/99

Max 12/28/99 Ltr DT RoR D

ERH 0 Hrs 0 Hrs 1.5 0 0 0 0

ERH 1.5 0 0 0 0

Pad Comments Cleared on

Arch Mech Elec Stru FLSO

Ini BLN X X X X

In 12/26/99

Out 12/26/99

RoR D

Hrs 1.5 0 0 0 0

ERH 1.5 0 0 0 0

PAD# 0 Add

BCK# Save

Inc ReCalc

CO Cost TF Letter

Remark 0

ABCDEF

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## Review

A TIO review (Activity Codes 371 and 471) must be added when a TIO Program is received. There is no standard form for a TIO program. The TIO program could be incorporated into the plans or a design firm may create their own form to accompany the plans. In light of this, section H of the Application for Plan Review has been modified to include a line to indicate that a Testing, Inspection and Observation Program has been included so the PT will know whether or not to enter a 371/471 activity code.

If the TIO program is received from the client for the office to review, a 371 Activity Code (TIO Plan Review) must be added. All staff assigned to the 325 or 331 review must also be assigned to review the TIO program. After the review has been added, a copy of the TIO program shall be placed in the project folder and the original TIO program will be attached to the plans to follow them through the review process.

If the TIO program is received from the client for the office to review after the plans are in the review process, a 371 activity code will be added at that time and all disciplines assigned to the 325 or 331 review shall also be assigned to review the 371 (TIO program). A copy of the TIO program shall be placed in the project file and the original TIO program will be given to

the project manager who will ensure all disciplines complete their review of the TIO program.

All Plan Review staff will be trained that although plan review may start without receiving a TIO program, plans cannot be approved without an approved TIO program. It is at the regional managers discretion to return plans for an incomplete Application for Plan Review if the TIO program is not included based on the size of the project and difficulty of the review.

If an approved project is received from OSHPD field staff and the application indicates that there is no TIO program included, PT will contact the Field Staff to ensure a TIO program was reviewed. If no TIO program was reviewed, the PT shall request the Field Staff send an approved TIO program to the office to file with the plans or in the project folder. If a TIO program was reviewed, the PT can then enter the 431 and a 471 with the same staff assigned to both reviews. If the project is sent to the office from OSHPD field staff for a split review and the application indicates that there is no TIO attached, the 431 will be entered and the 471 will not be entered until received from the field staff. If the TIO program is received from the client to be reviewed in the office a 371 will then be entered and follow the procedures above.

At this time we are aware that the 331/431 and 371/471 entries will in most cases be parallel and duplicate entries. Since this is a new program, it is necessary to monitor and track the receipt of the TIO program relative to the receipt of the application. In the future, it may be decided that the 371 review code is not necessary, but that is to be decided at a later date.

When a 371/471 receives manager approval (either AP or AC), the logbook will prompt you "Does this constitute TIO plan approval". If you select yes, the Logbook will transfer the manager approval date and type to the construction screen in the TIO received date and TIO approval type fields. If you select no, it will leave those fields blank.

If any one of the following three conditions is true, then the words "Testing, Inspection and Observation Program" should appear on the 331/431 AP/AC review letters:

- 1) The project has no TIO review.(371 or 471 activity code)
  - 2) There is one or more TIO reviews, however on the most recent TIO Review, the Manager Letter field contains something other than AC, AP, or blank.
  - 3) The TIO Returned date is not null and the TIO Accepted date is Null.
- For all other combinations of data the text should not appear on the letters. An example of this would be a Project where there is a TIO review where the Manager letter field is blank, and the TIO return date and TIO Accepted date are both null.

If a 371/471 is returned (RT) or (DT) and a backcheck is needed, another 371/471 code will be entered with the appropriate backcheck number in the BCK# field.

#### **Goals**

The TIO is part of the review process and as such, should be completed within the existing review time frames.(60/30/30 for S&G, 80/40/30 for H)

#### **Estimated Review Hours (ERH)**

Two hours for H projects for all disciplines.

One hour for S and G projects for all disciplines.

#### **Business Rules**

371/471 AP, AC, RT, or DT does not equal plan approval.

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File View Reports Utilities About

TimeSheet Project Info Review **Construction** Closure License 3 Memos 3 Facility

Project HL011192 - 0 Cnty 19A Facno 13333 Kind R Facility HENRY MAYO NEWHALL MEMORIAL HOSPIT

Status CLSD Scope SB 1953 RELATED CONST PROJ-PLACE TO EDIT/CHANGE SCOPE

Date In 9/5/01 Appr Ltr 1/24/02 Build Permit 1/24/02 Field Accepted 1/24/02 Date Closed 1/24/02

Received Returned Accepted  
 BP 1/9/02 1/24/02 1/24/02

IOR 12/5/01 1/24/02 1/24/02 A10101 IOR #  
 TIO 1/25/02 1/24/02 1/24/02 90274-9636 IOR Zip

TIO Plan Approval Letter Type AP Cleared On  
 Plan Review Approval Letter 1/24/02  
 Plan Approval Type (AP/AC) AP Cleared On

Building Permit Issued 1/24/02  
 Conditional Permit (Y/N) N

Construction Start Date 1/9/02

ACO AJT FLSO SMH DSE HXC  DSE Required?

ACD Field Visit Log

ACD	Date	Percent Done
BMR	1/24/02	100

Help Add Record Delete

Current Cost 50 Save  
 Rad Eq Cost 0  
 Beds Before const. 304  
 Beds after const. 309

Network User: BRUTSCHM 2/6/02 11:25 AM

### Construction

Upon approval (AP or AC) of 371/471 activity code, the Manager letter date will be transferred to the TIO Received field and the Manager letter type will be transferred to the TIO Plan Approval Letter Type field.

It is now the RCO's responsibility to verify the Responsible Firms and/or Individuals from the TIO program form. The RCO can return the TIO program if the firm or individuals do not meet their approval.

Once the RCO has accepted the TIO program, the TIO accepted date is filled in and the BP issuance process may continue.

Fields for TIO have been added beneath the IOR row, like IOR and BP fields.

"Tests and Inspection Sheet" label and field was replaced with "TIO Plan Approval Letter Type" and field for TIO approval type.

The Area and Cost/SF labels and fields have been removed.

The Beds Before/After Const fields have replaced the Area and Cost/SF fields.

Added new letter for BP, IOR and TIO returned. (Proj16.dot)

### Business Rules

A BP cannot be issued without Plan Approval, an approved IOR and an "accepted" TIO program.

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TimeSheet Project Info Review Construction **Closure** License 3 Memos 3 Facility

Project HL011192 - 0 Cnty 19A Facno 13333 Kind R Facility HENRY MAYO NEWHALL MEMORIAL HOSPIT

Status CLSD Scope SB 1953 RELATED CONST PROJ-PLACE TO EDIT/CHANGE SCOPE

Date In 9/5/01 Appr Ltr 1/24/02 Build Permit 1/24/02 Field Accepted 1/24/02 Date Closed 1/24/02

Date	ACT	Cost Est	Rad Cost	Remark
9/5/01	331	\$50.00	\$0.00	
12/3/01	499	\$50.00	\$0.00	

Add

**Final Verified Compliance Reports**

	License	Zip	Date		Date	Date
Architect	C01129	94102	1/9/02	● Plan Approval	1/24/02	First Request Letter
Mechanical	M01160	91325	1/9/02	● Building Permit	1/24/02	Final Request Letter
Electrical	E00758	92665	1/9/02	● Constr Start	1/9/02	Date Closed 1/24/02
Structural						
GOR	GE323	95691	1/24/02	● Field Accepted	1/24/02	Status CLSD
Contractor/ Ownr Bldr				●		
IOR	A10101	90274-9636	12/3/01	●	● Date Required	

Save

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## Closure

Changed "Final Verified Reports" to "Final Verified Compliance Reports".  
 Added Geotech fields to Final Verified Compliance Reports section between Structural and Contractor/Ownr Bldr.

Receipt of all Special Tests and Inspections at project closure needs to be verified along with receipt of all Verified Compliance Reports.

Field Accepted will indicate that all Special Tests and Inspections have been received.

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TimeSheet Project Info Review Construction Closure **License** 3 Memos 3 Facility

Project HL011192 - 0 Cnty 19A Facno 13333 Kind R Facility HENRY MAYO NEWHALL MEMORIAL HOSPIT

Status CLSD Scope SB 1953 RELATED CONST PROJ-PLACE TO EDIT/CHANGE SCOPE

Date In 9/5/01 Appr Ltr 1/24/02 Build Permit 1/24/02 Field Accepted 1/24/02 Date Closed 1/24/02

All
  Architect
  Mechanical
  Electrical
  Structural
  GOR
  Contractor
  IOR
  Legal

Resp	License #	Zip Code	First	Last	Phone	Save
<input type="radio"/> ARCH	C01129	94102	Robert	LaRocca	415 777-5363	
<input type="radio"/> MECH	M01160	91325			818 734-1600	
<input type="radio"/> ELEC	E00758	92665	Stan	Schweitzer	714 699-0696	
<input type="radio"/> STRU						
<input checked="" type="radio"/> GOR	GE323	95691	Stephen L.	French	916 372-1434	
<input type="radio"/> CONT						
<b>IOR</b>	A10101	90274-9636	FRANK	FREEMAN	310 831-8455	
<b>LEGAL</b>	707-525-5266	95405	Lloyd	Yandell	707-525-5266	

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## License Screen

Geotech Field between STRU and CONT fields has been added.  
 Geotech radio button to view license details has been added.

Added Geotech Field to all letters that show receipt of Final Verified Compliance Reports.