



4.4.11 [SR and CM] Construction Contract - Practical Completion

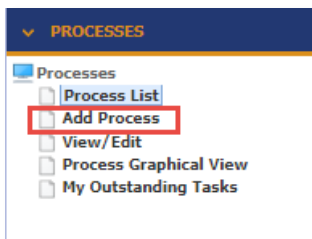
Completion of this process (4.4.11) will trigger the creation of the 5.1.1 Construction Contract Final Payment Claim process and will be ready for use.

This process will be added by the contract manager. Completion of the tasks within this process are jointly undertaken by the Superintendent's Representative and the Contract Manager.

CONTRACT MANAGER INSTRUCTIONS

To create the process.

1. Expand the Processes menu and select **Add Process** from the menu list.

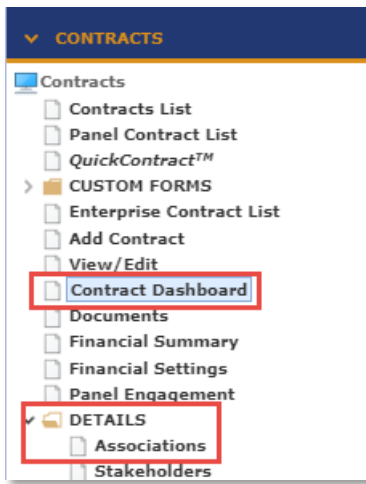


2. Select process from the process template dropdown [in this case select 4.4.11 Construction Contract – Claim for Subsequent Payment]

3. Click **Add**
4. Name the process using the following naming convention
4.4.11 < Contract No >< Contractors Name > < Practical Completion
5. **Search and select** the contract by entering contract number or contract name
6. Click on **Update**

There are two ways to access the process.

(via the **Contract Dashboard** screen OR **DETAILS, Associations** screen)

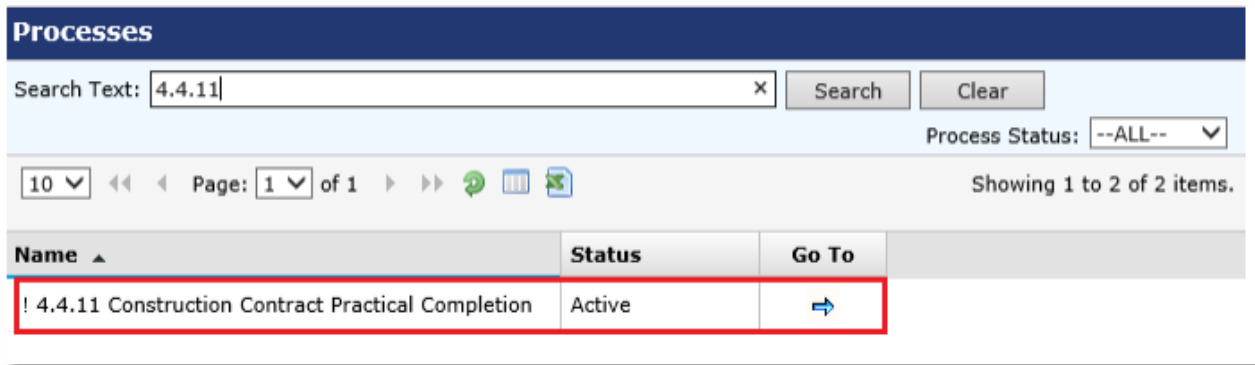


Navigate to the **CONTRACTS > Contract Dashboard** screen and go to the **Linked Processes Widget**. Select your Process from the list of **Active Processes** displayed.

Name	Description	Date Commented	
4.3.12 21593040 Adjust 001 Inglerwood Primary	Supers Rep loads Contractors Adjustment claim in PACMan and gives preliminary approval to the variat...	16/05/2023	0%
4.4.11 Construction Contract Practical Completion	Process for PRACTICAL COMPLETION of a Construction Contract. Completion of this process will crea...	2/07/2023	0%

Alternatively, you could also navigate to the **CONTRACTS > Details > Associations** Screen. From this screen you will see a list of all the associated Processes.

You can access a process by clicking on the arrow.

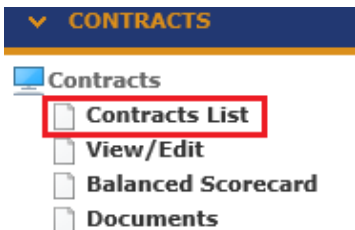


SUPERS REP INSTRUCTIONS

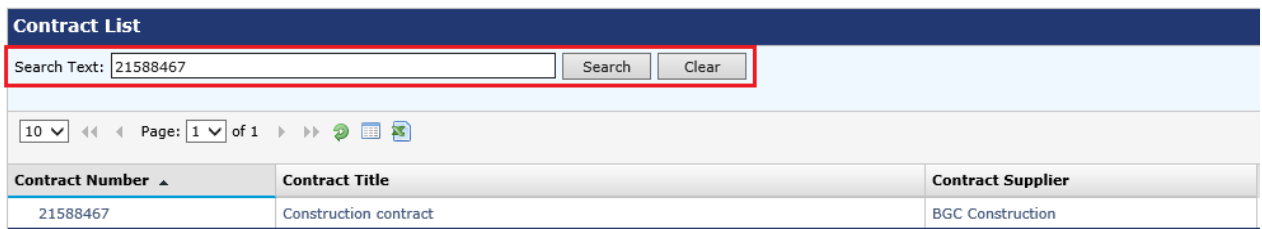
Once this process is available you will receive an email notification to alert you the process has been created. Within the email there will be a link to access the Payment Claim process via PACMan.

Alternatively, the process can also be accessed via the Contracts Module; to do this:

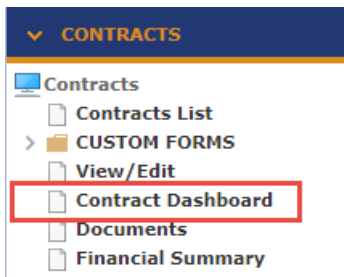
1. Expand the **Contracts** menu and select **Contracts List**



2. Enter the contract number or name in the **Search Text** field. Click **Search**. Click on your contract to select it.



3. There is **ONLY ONE WAY** to access the process.
 - via the Contract Dashboard screen



4. Navigate to the **CONTRACTS > Contract Dashboard** screen and go to the **Linked Processes** Widget. Select your Process from the list of Active Processes displayed.

Linked Processes			
Click here to add a new process.			
50	Page: 1 of 1	Showing 1 to 2 of 2 items.	
Name	Description	Date Commented	
4.3.12 21593040 Adjust 001 Inglewood Primary	Supers Rep loads Contractors Adjustment claim in PACMan and gives preliminary approval to the variat...	16/05/2023	0%
4.4.11 Construction Contract Practical Completion	Process for PRACTICAL COMPLETION of a Construction Contract. Completion of this process will crea...	2/07/2023	0%

Process Task List

Status	Task Name	Attachments	Additional Info	Not Applicable	Go To
<input checked="" type="checkbox"/> Complete	Link Process to Contract - search in ENTITY field @ Top of Screen			<input type="checkbox"/>	
<input checked="" type="checkbox"/> Complete	[CM] Amend Contract Title to include Tender No#			<input type="checkbox"/>	
<input checked="" type="checkbox"/> Complete	[CM] Confirm BGO name is correct			<input type="checkbox"/>	
<input type="checkbox"/> Blocked	[SR] Attach Contractor's Notification of "Anticipated Practical Completion" (within 14 or more days)			<input type="checkbox"/>	
<input type="checkbox"/> Incomplete	[CM] Update Anticipated Practical Completion Date			<input type="checkbox"/>	
<input type="checkbox"/> Incomplete	[CM] Attach Certificate of Occupancy - if applicable			<input type="checkbox"/>	
<input type="checkbox"/> Incomplete	[SR] Attach/Confirm Practical Completion Documents provided by Contractor			<input type="checkbox"/>	
<input type="checkbox"/> Blocked	[SR] Undertakes Pre-Inspection for defects			<input type="checkbox"/>	
<input type="checkbox"/> Incomplete	[CM] Notifies Agency of potential practical completion & need for insurances			<input type="checkbox"/>	
<input type="checkbox"/> Blocked	[CM] Provides Agency with List of Final Defects			<input type="checkbox"/>	
<input type="checkbox"/> Blocked	Contractor advises Super's Rep Date for Practical Completion			<input type="checkbox"/>	
<input type="checkbox"/> Blocked	[CM] updates Date for Practical Completion Date			<input type="checkbox"/>	
<input type="checkbox"/> Blocked	[SR] requests Financial Security reduction (Bank Guarantees or Retentions)			<input type="checkbox"/>	
<input type="checkbox"/> Incomplete	Issue Practical Completion Certificate with Defect & Omissions details			<input type="checkbox"/>	
<input type="checkbox"/> Blocked	For each Separable Portion, undertake Practical Completion (conditions precedent)			<input type="checkbox"/>	
<input type="checkbox"/> Blocked	[CM] Confirms Security (PC Bank Guarantee) to be released			<input type="checkbox"/>	
<input type="checkbox"/> Blocked	[BGO] Confirms Security (Bank Guarantee) Released			<input type="checkbox"/>	
<input type="checkbox"/> Blocked	[BGO] Letter of Security Release to financial institution			<input type="checkbox"/>	
<input type="checkbox"/> Blocked	Set Reminders for Defect Expiry Period(s)			<input type="checkbox"/>	
<input type="checkbox"/> Blocked	Update Contract Status to DEFECTS - Liability Period			<input type="checkbox"/>	

[CM] Link Process to Contract – Search in ENTITY field @ TOP of Screen

- Contract Manager to search for relevant Contract and select, then UPDATE
 - A notification is then sent to the Superintendent’s Representative advising Practical Completion process has been initiated by the Contract Manger.

[CM] Amend Contract Description to include Tender NO #

- Contract Manager to upload Tender number if not already in PACMan.
 - This will then display on the Practical Completion Certificate


[CM] Confirm BGO name is correct

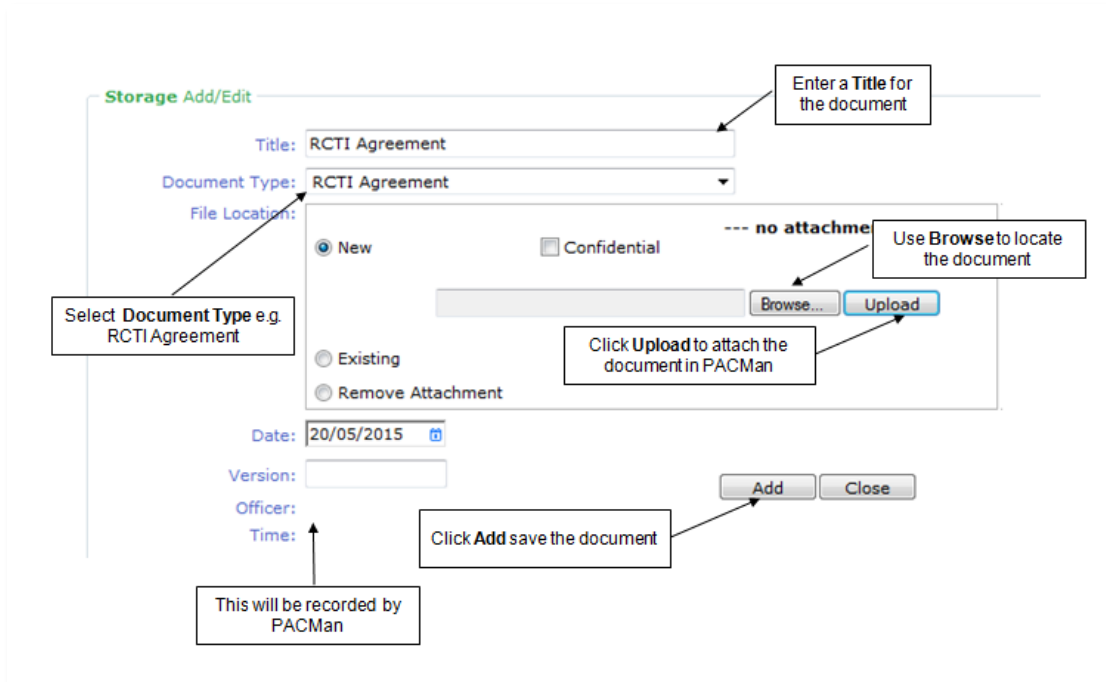
1. Contract Manager to check that current Bank Guarantee Officer is listed in the Stakeholder list

SUPER'S REP TASK

[SR] Attach Contractor's Notification of "Anticipated Practical Completion (within 14 days or more)"

1. Attach a copy of the Anticipated Practical Completion:

- a) Click the  to enter the Document Storage screen.
- b) Click the link **Click here to add a new Storage Item**.
- c) Enter the following details:
 - **Title:** Document Title
 - **Document Type:** Select an applicable type or leave as **Not Set**
 - **Date:** This will default to today's date
- d) Use the **Browse** button to locate your document.
- e) Click **Upload** to save.
- f) Click **Add** to record your Storage Item Entry.



2. Complete the task:

- a) Use the **Back Tab** to navigate back to the Process Task List.
- b) Mark this task as **complete**.

Contract Manager - [CM] Update Anticipated Practical Completion Date

1. Contract Manager to update Anticipated Practical Complete Date

Contract

Commencement Date: 30/08/2021

Perpetual:

Term of Contract: 0 years 7 months 0 weeks 0 days

Options Exercised: 0 years 0 months 0 weeks 0 days

Variation Days: 64 days

Original Practical Completion Date: 29/03/2022 Tuesday, 29 March 2022

Revised Practical Completion Date: 01/06/2022 Wednesday, 1 June 2022

Recalculate

Consultant: Anticipated Completion Date: Construction: Anticipated PC: 1/06/2022

Deed of Novation Date:

Calculate Period

From Children

Apply Close

Process Task: [CM] updates ACTUAL Practical Completion Date

Back

2. Update
3. Mark this task as **complete**.

Completion of this task sends a notification to the Bank Guarantee Officer to advise release of Bank Guarantee is pending

Contract Manager - [CM] Attach Certificate of Occupancy

1. **Attach a copy of the Certificate of Occupancy:**
This should have been received electronically
 - a) Click the to enter the **Document Storage** screen.
 - b) Click the link **Click here to add a new Storage Item**.
 - c) Enter the following details:
 - **Title:** Document Title
 - **Document Type:** Select an applicable type or leave as **Not Set**
 - **Date:** This will default to today's date
 - d) Use the **Browse** button to locate your document.
 - e) Click **Upload** to save.
 - f) Click **Add** to record your Storage Item Entry.
2. **Complete the task:**
 - a) Use the **Back Tab** to navigate back to the Process Task List.
 - b) Mark this task as **complete**.

SUPER'S REP TASK

[SR] Attach/Confirm Practical Completion Documents provided by Contractor

Click on the **bold task name** to view the sub-process task list, complete each of these tasks.

<input checked="" type="checkbox"/>	Complete	[CM] Attach Certificate of Occupancy - if applicable		<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Incomplete	[SR] Attach/Confirm Practical Completion Documents provided by Contractor		<input type="checkbox"/>	
<input type="checkbox"/>	Blocked	[SR] Undertakes Pre-Inspection for defects		<input type="checkbox"/>	
<input type="checkbox"/>	Incomplete	[CM] Notifies Agency of potential practical completion & need for insurances		<input type="checkbox"/>	

Sub tasks

Status	Task Name	Attachments	Additional Info	Not Applicable	Go To
<input type="checkbox"/> Incomplete	Testing and Commissioning Regime Plans and Documentation		i	<input type="checkbox"/>	→
<input type="checkbox"/> Incomplete	Confirm Contractor has completed Testing & Commissioning		i	<input type="checkbox"/>	
<input type="checkbox"/> Incomplete	Confirm "As Constructed" Drawings have been received		i	<input type="checkbox"/>	
<input type="checkbox"/> Incomplete	Confirm "As Constructed" Drawings sent to BMW		i	<input type="checkbox"/>	
<input type="checkbox"/> Incomplete	Maintenance Plan and Schedule (if applicable)		i	<input type="checkbox"/>	
<input type="checkbox"/> Incomplete	Operational and Equipment Maintenance Manuals		i	<input type="checkbox"/>	
<input type="checkbox"/> Incomplete	Confirm training provided to Occupants		i	<input type="checkbox"/>	
<input type="checkbox"/> Incomplete	Manuals & Warranty Documents		i	<input type="checkbox"/>	

Page 1 of 1

Go To Next Sub Process

Testing and Commissioning Regime Plans and Documentation**1. Attach a copy of the required documentation:**

- a) Click the [→](#) to enter the **Document Storage** screen.
- b) Click the link **Click here to add a new Storage Item.**
- c) Enter the following details:
 - **Title:** Document Title
 - **Document Type:** Select an applicable type or leave as **Not Set**
 - **Date:** This will default to today's date
- d) Use the **Browse** button to locate your document.
- e) Click **Upload** to save.
- f) Click **Add** to record your Storage Item Entry.

2. Complete the task:

- a) Use the **Back Tab** to navigate back to the Process Task List.
- b) Mark this task as **complete**.

Confirm Contractor has completed Testing & Commissioning

This is an off-system task, mark as **complete** to acknowledge and confirm Contractor has completed Testing & Commissioning.

Confirm "As Constructed" Drawings have been received

This is an off-system task, mark as **complete** to acknowledge and confirm "As Constructed" Drawings have been received by the Contractor and sent to the Contract Manager.

Maintenance Plan and Schedule (if applicable)

This is an off-system task and if this task is not required for the contract mark as **Not Applicable**.

Mark as **complete** to confirm the Maintenance Plan and Schedule has been sent to Dept of Finance Contract Manager.

Operational and Equipment Maintenance Manuals

This is an off-system task and marking complete confirms the Operational and Equipment Maintenance Manuals have been sent to the DOF Contract Manager.

Confirm training provided to Occupants

This is an off-system task, mark as **complete** to confirm training has been provided to occupants.


Manuals & Warranty Documents

This is an off-system task, mark as **complete** to confirm Manuals & Warranty certificates have been provided to the Occupant and copies have been forwarded to the DOF Contract Manager.

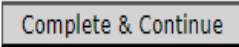
Super's Rep [SR] Undertakes Pre-Inspection for defects

Discuss any defects with the contractor and attach relevant documentation in this task.

1. Attach a copy of relevant documentation:

- a) Click the  to enter the **Document Storage** screen.
- b) Click the link **Click here to add a new Storage Item**.
- c) Enter the following details:
 - **Title:** Document Title
 - **Document Type:** Select an applicable type or leave as **Not Set**
 - **Date:** This will default to today's date
- d) Use the **Browse** button to locate your document.
- e) Click **Upload** to save.
- f) Click **Add** to record your Storage Item Entry.


2. Complete the task:

Click on the **Complete & Continue** button  to return to the Process.

CM notifies Agency of potential practical completion & need for insurances

This is an off-system task, mark as **complete** to acknowledge that you have notified the Agency of potential practical completion and the need for insurances.

CM Provides Agency with List of Final Defects**1. Attach a copy of the Defect List provided to the Agency using the following instructions:**

- g) Click the  to enter the **Document Storage** screen.
- h) Click the link **Click here to add a new Storage Item**.
- i) Enter the following details:
 - **Title:** Document Title
 - **Document Type:** Select an applicable type
 - **Date:** This will default to today's date

- j) Use the **Browse** button to locate your document.
- k) Click **Upload** to save.
- l) Click **Add** to record your Storage Item Entry.

2. Mark this task as **complete**.


SUPER'S REP TASK

Contractor advises Super's Rep Date for Practical Completion

This is an off-system task, Supers Rep to mark as **complete** to confirm that the contractor has advised the date for Practical Completion.

- Notification is then sent to Contract Manager advising Super's Rep has actioned this task

Contract Manager [CM] updates ACTUAL Practical Completion Date

1. Click the  to enter the **Key Dates** screen.
2. Click into the **Completion** Tab
3. Update the **Date of Practical Completion**: check the **Defects Liability Period** is correct.
4. This date will appear on the Practical Completion Certificate

The screenshot shows a web interface for managing contract key dates. The breadcrumb trail is 'CONTRACTS > KEY DATES > Dates'. The current contract is '21593040: Inglerwood Primary'. The 'Completion' tab is selected. Under the 'Post-Contract' section, the 'Date of Practical Completion' is 14/02/2024. The 'Defects Liability Period' is 0 years, 0 months, 0 weeks, and 0 days. There are several 'N/A' fields and a 'Date of Final Completion' field. At the bottom right, there are 'Apply', 'Close', and 'Back' buttons. The process task is '[CM] Update Anticipated Practical Completion Date'.

5. Click **Apply** to save the changes.
6. Mark this task as **complete**.


SUPERS REP TASK

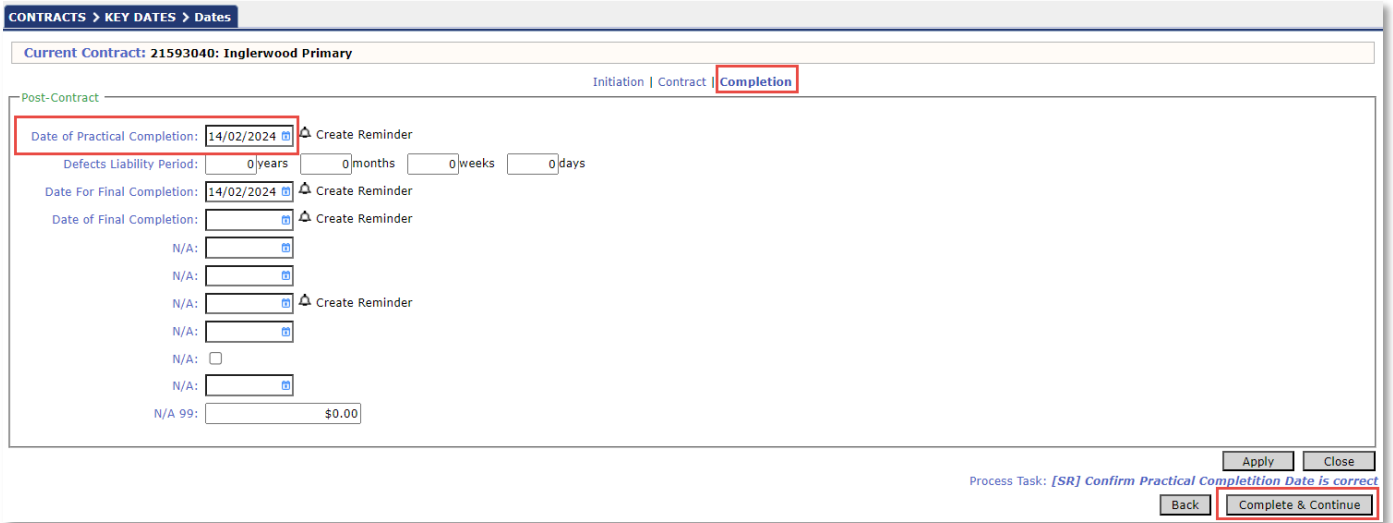
[SR] Requests Financial Security Reduction (Bank Guarantee or Retention)

To confirm security to be released, mark this task as **complete**.

This will trigger a notification to the Contract Manager and Bank Guarantee officer notifying them to complete this action.


[SR] Confirm Practical Completion Date is correct

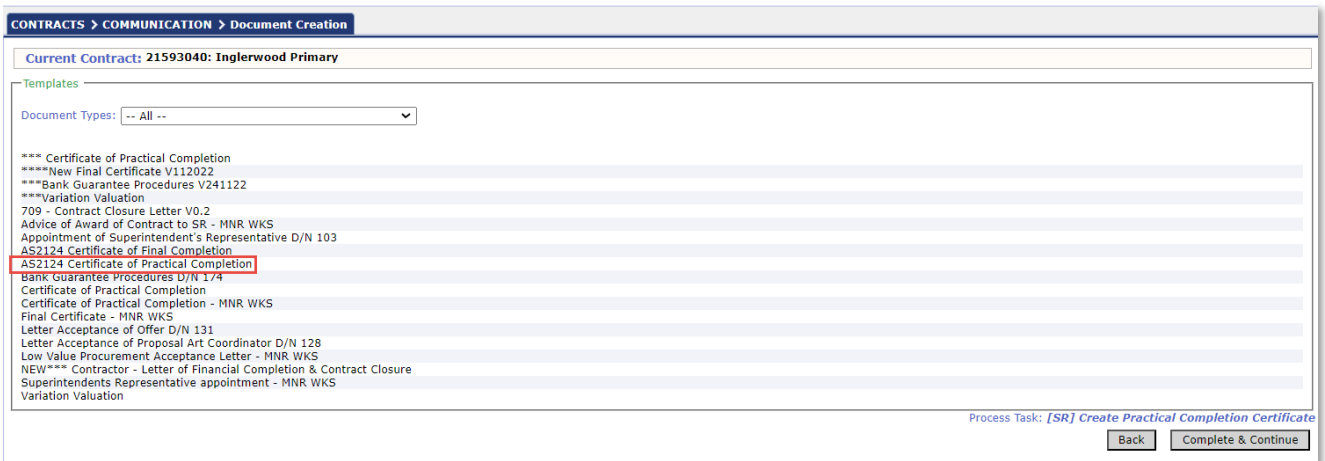
1. Click the  to enter the **Key Dates** screen.
2. Check the **Date of Practical Completion** is correct.
3. This date will appear on the Practical Completion Document



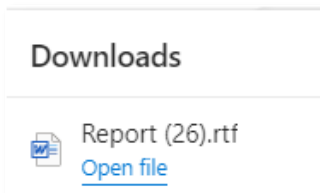
4. Use the **Complete & Continue** tab to navigate back to the process.

[SR] Create Practical Completion Certificate

1. Click the  to enter the **Document Creation** screen.
2. Select the **AS2124 Certificate of Practical Completion**

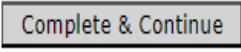


3. A file download popup will appear, click Open file.



4. View and Save a copy of the certificate.




5. **Complete & Continue** button  to return to the Process.

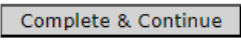
[SR] Attach Practical Completion Certificate – must be unconditional

If this task is not required for the contract mark as **Not Applicable**. If this task is required complete the following;

1. **Attach a copy of the required documentation:**


- Click the  to enter the **Document Storage** screen.
- Click the link **Click here to add a new Storage Item**
- Enter the following details:
 - Title:** Document Title
 - Document Type:** Select an applicable type or leave as **Not Set**
 - Date:** This will default to today's date
- Use the **Browse** button to locate the certificate you generated and saved in the last task.
- Click **Upload** to save.
- Click **Add** to record your Storage Item Entry.

2. **Complete the task:**

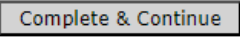
Click on the **Complete & Continue** button  to return to the Process.

[SR] Adds Practical Completion (Milestone) Report


1. **Attach a copy of the required documentation:**

- Click the  to enter the **Document Storage** screen.
- Click the link **Click here to add a new Storage Item**
- Enter the following details:
 - Title:** Document Title
 - Document Type:** Select an applicable type or leave as **Not Set**
 - Date:** This will default to today's date
- Use the **Browse** button to locate your document
- Click **Upload** to save.
- Click **Add** to record your Storage Item Entry.

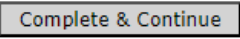
2. Complete the task:

Click on the **Complete & Continue** button  to return to the Process.

CONTRACT MANAGER TASK**[CM] Advise Agency Practical Completion & Occupancy Date****1. Attach a copy of the required documentation:**

- a) Click the  to enter the **Document Storage** screen
- b) Click the link **Click here to add a new Storage Item**
- c) Enter the following details:
 - **Title:** Document Title
 - **Document Type:** Select an applicable type or leave as **Not Set**
 - **Date:** This will default to today's date
- d) Use the **Browse** button to locate your document
- e) Click **Upload** to save.
- f) Click **Add** to record your Storage Item Entry.

2. Complete the task:

Click on the **Complete & Continue** button  to return to the Process.

For each Separable Portion, undertake Practical Completion (conditions present)


This task can be actioned by either the DOF Contract Manager or the Super's Rep.

This is an off-system task, mark as **complete** to acknowledge that you have undertaken practical completion for each separable portion.

[CM] Confirms Security (PC Bank Guarantee or Retention) to be released

This is an off-system task to confirm security to be released, mark this task as **complete**. This will trigger a notification to the Bank Guarantee Officer and Super's Rep notifying them to complete this action.

[BGO] Confirm Security (Bank Guarantee) Released

1. Click the  to enter the **Securities** screen.
2. Select the security to open more detail.
3. Record the **Actual Date Released**.

CONTRACT COMPLIANCE > Securities

Current Contract: 21593040: Inglerwood Primary

Securities Edit

Security Type: Bank Guarantee

Party | Institution: Commonwealth Bank

Security Expiry Date: [] Create Reminder

Reference Number: 123456

Security Value: \$10,000,000.00

Monetary Type: -- Not Set --

Date Requested: 3/05/2022 []

Date Lodged: 6/07/2022 []

Estimated Release Date: 21/06/2023 [] Create Reminder

Actual Date Released: 3/07/2023 []

Unconditional Undertaking:

Details: []

Attachment: Attachments

Bank Guarantee - 1 - Copy.docx []

New Confidential

Choose File No file chosen Upload

Existing

Update Close Delete

4. Click **Update** to save.

Securities for the Contract

Search Text: [] Search Clear

Page: 1 of 1 Showing 1 to 1 of 1 items.

Security Type	Security Value	Date Requested	Date Lodged	Unconditional Undertaking	Estimated Release Date	Actual Date Released	Security Expiry Date	Verified
Bank Guarantee	\$10,000,000.00	03/05/2022	06/07/2022	No	21/06/2023	03/07/2023		

Process Task: [BGO] Confirms Security (Bank Guarantee) Released

Back Complete & Continue

5. Click on the **Complete & Continue** button to return to the Process.


This will trigger a notification to Contract Manager and Super's Rep confirming the release of the security.

[BGO] Letter of Security Release to financial institution

Tenders Office > Bank Guarantee Officer sends a letter of release to the financial institution and attaches a copy here.

Set Reminder for 2 months prior to expiry of Defects Liability Period(s)

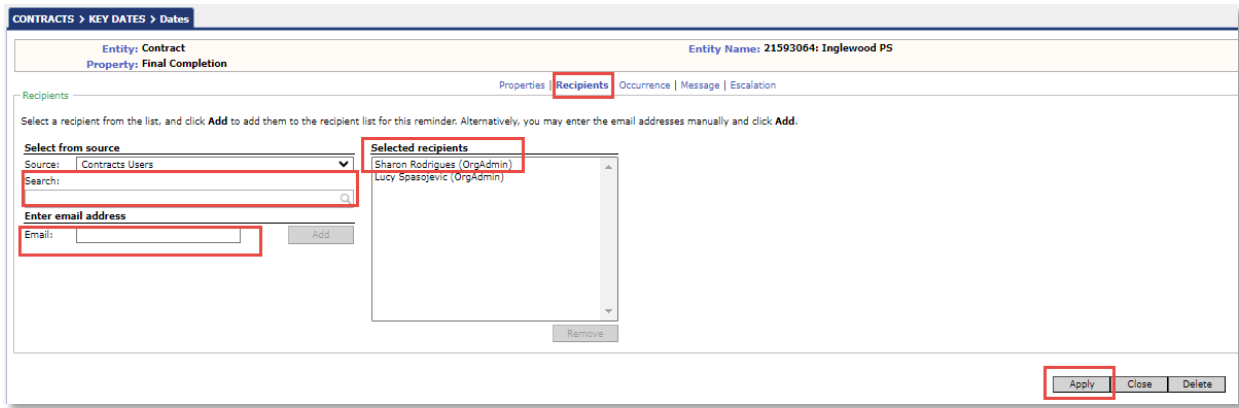
These tasks can be completed by either the Contract Manager or the Superintendent's Representative

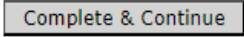
1. Click the  to enter the **Contract Dates Screen**.
2. Go to the **Completion tab**.
3. To set a reminder 2 months prior to the expiry of defects liability click the **Create Reminder** button on the **Final Completion** date field.

- Adjust the reminder title to reflect “[Contract No] End of Defects Liability Period and ensure the start date is set to two months’ prior the end of this period.


- You may also wish to adjust the message to include a statement about the end of the Defects Liability Period.

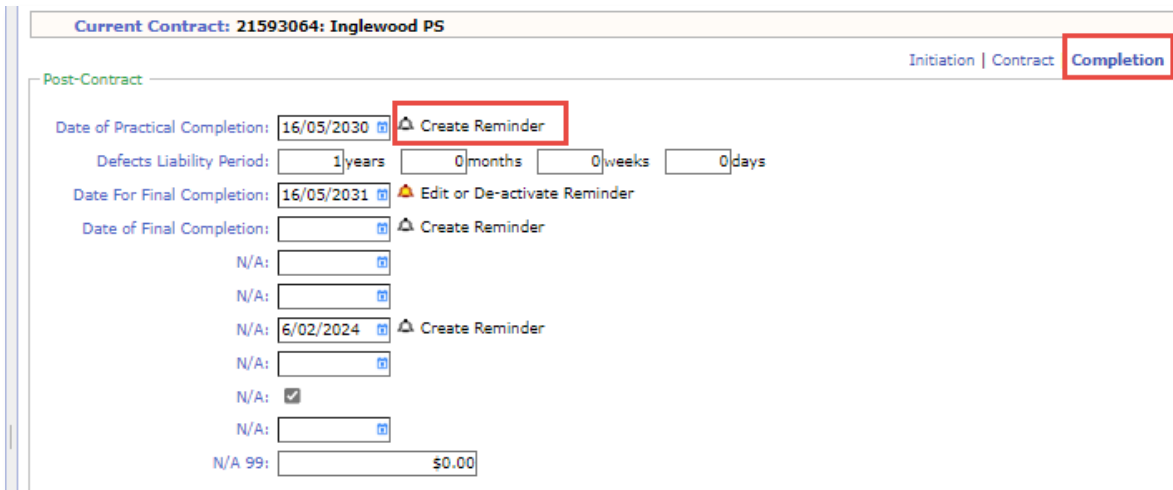
- You may also wish to add multiple recipients to receive the reminder.
- You can search and select or insert email address.



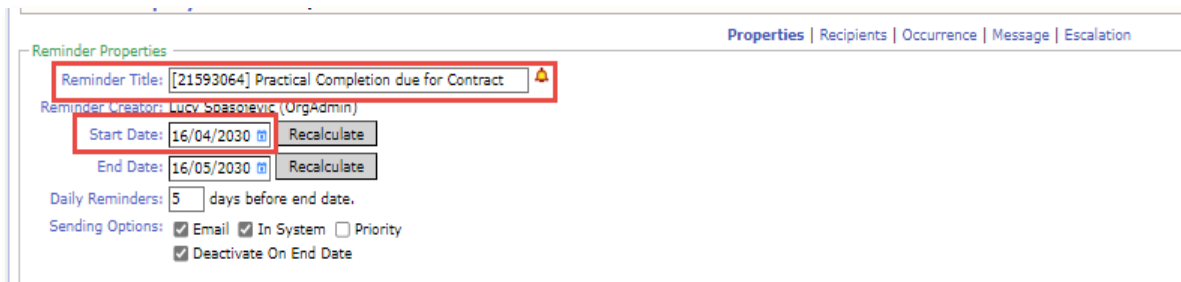
8. Click **Apply**
9. Click on the **Complete & Continue** button  to return to the Process.

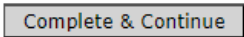
Set Final Payment Reminder for the end of each duration of Defects Liability Period

1. Click the  to enter the **Contract** screen.
2. Go to the **Completion** tab.
3. To set a reminder for then end of defects liability click the **Create Reminder** button on the **Date of Practical Completion** field.



4. Adjust the reminder title to reflect “[Contract No] End of Defects Liability Period – Final Payment
5. Select **Start Date** for reminder is correct, if not update

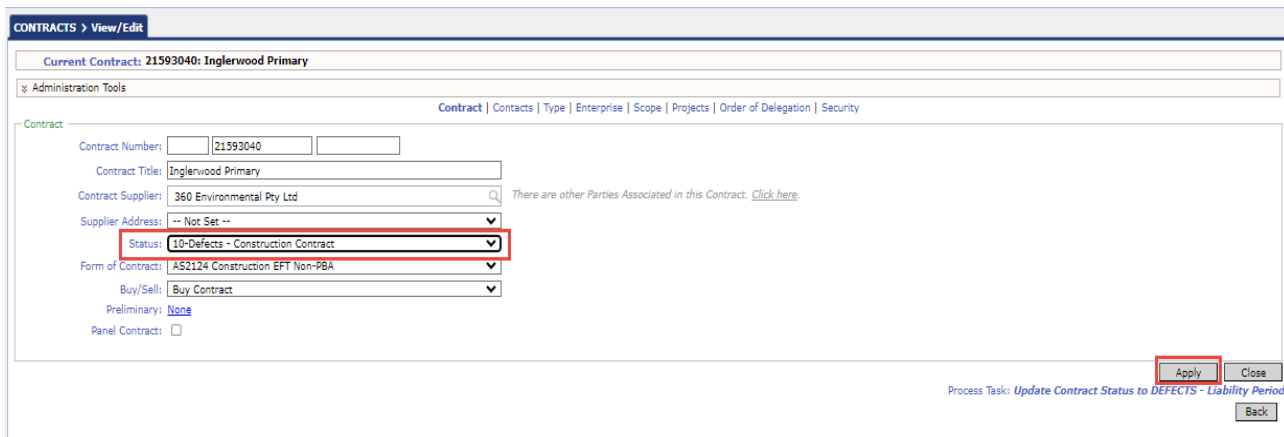


6. Click **Apply**
7. Click on the **Complete & Continue** button  to return to the Process.

Update Contract Status to DEFECTS Liability Period

As we the contract has reached Practical Completion, which is one day in the life of the Contract, the Contract Status should be amended to DEFECTS - for the Defect Liability Period.

1. Click the  to enter the **CONTRACTS>View/Edit** screen.
2. Update the **Status** field to reflect **10-Defects – Construction Contract**.



3. Click Apply
4. Mark this task as complete

Check Defects Liabilities has been completed and that payment claim is made within the 20-day period or is instigated by the Superintendent’s Representative

Process Auto Creation

Upon completion of this process PACMan will auto-create the 5.1.1 Construction Contract Final Payment Claim Process.

Additional Information

All Finance staff are to follow their team’s best practice guidelines for project and contract management.

This document is a part of the PACMan Policy and Procedures framework ([PACMan Policy and Procedures](#)).

Please ensure you understand and comply with any obligations arising from Finance’s Delegation and Authorisation Framework and the Western Australian Procurement Rules.