PROJECT RECOVERY
CONSULTANTS, LLC

Field Controls
Checklist Pack

Four checklists that catch the problems that most often turn into liquidated damages, rejected test packages and lost change orders on mechanical jobs.

01 P6 Schedule Health Check

02 Pre-Test Quality Gate: Piping

03 Delay Notice & Daily Log Checklist

04 Change Order & Labor Checklist

General guidance for experienced project teams. Your contract documents, specifications, governing codes and your company's safety program always take precedence.

CHECKLIST 01

P6 Schedule Health Check

Run this on every monthly update before you sign it or accept the GC's version.

Project _____ Prepared by _____ Date _____

UPDATE BASICS

- [ ] Data date is correct, and every activity left of it has actual dates (no future actuals, no missing actuals).
- [ ] Scheduling option is Retained Logic, not Progress Override. Progress Override lets out-of-sequence work leap ahead and hides delay.
- [ ] No activities sitting at "99% complete" for weeks with a start but no finish.
- [ ] The schedule log (schedlog) has been reviewed for out-of-sequence progress, unsatisfied constraints and open ends.

LOGIC

- [ ] Open ends: only the project start (NTP) lacks a predecessor and only project finish lacks a successor.
- [ ] Missing-logic activities are under 5% of incomplete work (DCMA 14-Point).
- [ ] No negative lags (leads). Positive lags over 5 working days are justified in writing.
- [ ] Successors are tied with Finish-to-Start logic wherever the work truly depends on completion; SS/FF lags are not hiding a stalled predecessor.

CONSTRAINTS, CALENDARS AND FLOAT

- [ ] Hard constraints (Mandatory Start/Finish, Finish On or Before) are 5% or less of activities and each one is backed by the contract.
- [ ] Trade activities use consistent calendars (for example, a 5-day/8-hour calendar is not mixed with a 7-day commissioning calendar without reason).
- [ ] Activities with total float over 44 working days are checked for missing successors.
- [ ] Negative float is identified, and the driving path behind it is understood.

BASELINE COMPARISON

- [ ] Start, finish and total-float variance columns against the approved baseline (BL1) are reviewed.
- [ ] Any activity of yours that lost float is traced to its cause (upstream delay, logic change or your own progress).
- [ ] Changes the GC made to your activities since last month are listed and questioned in writing.

Found more than three gaps? Book a free 30-minute project health check: projectrecoveryconsultants.org/#health-check

CHECKLIST 02

Pre-Test Quality Gate: Piping

Walk this before you call for a joint hydro or pneumatic test walkdown.

Project _____ Prepared by _____ Date _____

PAPERWORK AND BOUNDARIES

- [ ] Governing code confirmed for the system (ASME B31.3 process or B31.9 building services) and the test medium and pressure match the spec.
- [ ] Current P&ID, isometrics and line list agree on line size, schedule and material. Superseded revisions are pulled from the field.
- [ ] Test boundary is marked on the P&ID: test limits, vents, drains and every blind or closed isolation point.
- [ ] Weld log, NDE records and spool map are reconciled to the final isometrics; every weld in the boundary is accounted for.
- [ ] Test pressure calculation is written down and signed (B31.3 includes the temperature correction; B31.9 hydro is typically 1.5 x design pressure).

ISOLATION AND COMPONENTS

- [ ] Control valves, instruments, meters, expansion joints and anything not rated for test pressure are removed, blinded or isolated.
- [ ] High-point vents and low-point drains are installed and accessible.
- [ ] Temporary blinds are rated, tagged and logged so every one comes back out.
- [ ] Hangers and supports are installed, and spring hangers are pinned if the spec requires it.

TEST EQUIPMENT

- [ ] Relief device on the test manifold is set and tagged for the test.
- [ ] At least two calibrated gauges: one at the manifold, one at the far or high point of the boundary.
- [ ] Gauge certificates are current, and dial range is about 1.5 to 4 times the test pressure.
- [ ] A bleed valve for controlled depressurization is installed on the manifold.

EXECUTION AND SIGN-OFF

- [ ] Test procedure and job hazard analysis are reviewed with the crew; the exclusion zone is set, especially for pneumatic tests.
- [ ] Pressure is raised in stages (for example 25% steps) with holds, and the supply is isolated before the hold period starts.
- [ ] Hold time meets the code and spec (B31.3 hydro: at least 10 minutes) before the leak examination.
- [ ] System is fully depressurized and the multi-party sign-off is complete before any blind is removed.

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CHECKLIST 03

Delay Notice & Daily Log Checklist

Use the day a delay starts. Late or vague notice is the fastest way to lose a valid claim.

Project _____ Prepared by _____ Date _____

BEFORE THE JOB STARTS

- [ ] Notice requirements are read from your subcontract and the prime contract: how many days, to whom, and in what form.
- [ ] The shortest notice window is written on the project's front sheet (subcontracts often require 3 to 7 calendar days).
- [ ] Your team knows meeting minutes, conversations and casual emails are not formal written notice.

WHEN A DELAY STARTS

- [ ] Send an initial written Notice of Potential Delay inside the window, even if the full impact is not known yet.
- [ ] State the factual trigger: what happened, where, when, and who or what caused it.
- [ ] Tie it to the schedule: the affected activity IDs and whether they are on or near the critical path.
- [ ] Include a reservation of rights to claim time and cost once the impact is known.
- [ ] Describe what you are doing to limit the delay (resequencing, moving crews, pacing).
- [ ] Follow up with a quantified submission (FragNet/TIA and cost) once the delay ends or the impact is clear.

DAILY LOG ENTRIES DURING THE DELAY

- [ ] Exact location (building, level, gridlines) and the affected scope.
- [ ] Crew size, hours worked and hours lost, by activity ID.
- [ ] The time window the work was blocked, and the specific cause.
- [ ] Time-stamped photos and the names of the people notified.
- [ ] Entries written the same day and kept unedited. Fix mistakes with a dated addendum.

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CHECKLIST 04

Change Order & Labor Checklist

Use it the day scope changes. A change you can't back up with hours and dates is a change you don't get paid for.

Project _____ Prepared by _____ Date _____

WHEN THE CHANGE STARTS

- [ ] Written notice of the change is sent inside the window your subcontract requires, even before you have a price.
- [ ] Verbal direction is confirmed in writing the same day. If you must proceed before approval, say so and reserve your rights.
- [ ] The trigger is named: the RFI, ASI, bulletin, drawing revision or field directive, with its number and date.
- [ ] A separate cost code or work order is opened, so change hours never mix with base-contract hours.
- [ ] T&M work has daily tickets (crew, hours, material, equipment) signed by the GC's representative.

PRICING THE LABOR

- [ ] Quantities come from a takeoff of the revised documents, and the marked-up drawings are attached.
- [ ] The labor-unit source is stated (MCAA labor units or your company's history) and adjusted for height, access and congestion.
- [ ] Impact factors (overtime, trade stacking, crew size, out-of-sequence work) come from the MCAA labor-factor tables, and each one is backed by a dated log entry or photo.
- [ ] The composite labor rate shows its buildup: wage, fringes, payroll taxes, insurance and supervision, as the contract allows.
- [ ] Material quotes, rentals and subcontractor prices are attached, and markups match the contract percentages.
- [ ] Time is priced in the same request (a fragnet showing the schedule impact) or expressly reserved in writing.

TRACKING LABOR WHILE THE WORK HAPPENS

- [ ] Budgeted hours are set by cost code, and earned hours are compared with actual hours every week.
- [ ] A productivity index under 1.0 on any cost code is explained in writing that week, with its cause.
- [ ] Daily logs record crew size, hours lost and the cause of each disruption, by activity or cost code (see Checklist 03).
- [ ] An unimpacted stretch of work is identified so lost productivity can later be measured against it.

SUBMITTING AND CLOSING IT OUT

- [ ] Every request is in a change order log: number, date sent, value, days requested, status and days outstanding.
- [ ] Requests outstanding more than 30 days get a written follow-up, then escalation under the contract's dispute clause.
- [ ] Before signing an executed change order, the release language is read, and cumulative-impact rights are reserved where allowed.

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