

**TAA Project Tracking Checklist**

This is a document submittal tracking tool - by project activity, by phase - for use by the Tenant, the A/EOR and other project team members.

Required  
Submitted

Tenant Name \_\_\_\_\_

Facility/ \_\_\_\_\_

Project \_\_\_\_\_

TAA Number \_\_\_\_\_

Project Initiation	Date Issued to PA	Date Received from PA
Project Initiation Form/Project Determination (TAA-MWA Ph 1 01)		
Phase I – Design	Date Issued to PA	Date Received from PA
<b>Kick-off Meeting</b>		
Tenant's Form Identifying A/EOR		
<b>Acceptance of TAA Process</b>		
Tenant's Form Accepting TAA process		
A/EOR's Form Accepting TAA process		
<b>Site Visits</b>		
Existing Conditions Survey		
Asbestos and HAZMAT Survey		
<b>Preliminary Review (if required)</b>		
<b>Conceptual Review Submittal (if required)</b>		
<b>Architectural Review Submittal (if required)</b>		
<b>Sustainable Design Review Submittal (if required)</b>		
<b>Contract Document Submittal</b>		
TAA Application (Form PA-531)		
Phasing Plan (as applicable)		
A/EOR Declaration (Form TAA Ph 1 06)		
Contract Documents List (TAA Ph 1 07) and Design Documents		
List of Special Inspections		
Asbestos Certification Form, or Abatement Permit Application		
Sustainable Design Form and Documentation (if required)		
Draft M/WBE Plan		
Tenant Alternation Application Fees (as applicable)		
<b>PA Review and Rider Comments</b>		
Rider A		
Rider A Response Form with updated Contract Documents List (TAA Ph 1 07) and Design Documents		
Rider B		
Rider B Response Form with updated Contract Documents List (TAA Ph 1 07) and Design Documents		
<b>PA Full Approval - 'NFC' Letter</b>		
<b>Pre-Construction Submittal Package</b>		
Contractors Insurance Certificates		
M/WBE Participation Plan		
Tenant's Identification Form		
A/EOR's Identification Form		
Health and Safety Plan		
Environmental Management Plan (as applicable)		

**TAA Project Tracking Checklist (continued)**

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Tenant Name \_\_\_\_\_

Facility/ \_\_\_\_\_

Project \_\_\_\_\_

TAA Number \_\_\_\_\_

Phase II – Construction	Date Issued to PA	Date Received from PA
<b>Pre-Construction Meeting</b>		
Prime Contractor Name and Emergency Contact		
List of Sub-Contractors		
List all Special Inspections Required		
Construction schedule		
Hours of work		
Health and Safety Plan		
Security plan		
Approved drawings highlighting staging areas, haul routes, delivery routes		
Construction Permit		
<b>Construction</b>		
M/WBE Monthly Reporting Plan		
Cutting and welding permits (if applicable)		
Hot Work permits (if applicable)		
Electric arc welding permit (if applicable)		
Special Inspection documentation		
<b>Partial Inspection (no occupancy)</b>		
Certification Form		
Non-Conformance report		
<b>Phase III – Close-out &amp; Occupancy</b>	<b>Date Issued to PA</b>	<b>Date Received from PA</b>
<b>Partial Inspection (for occupancy)</b>		
Certification Form		
Special Inspection Documents		
Non-Conformance report		
Re-certification Form		
Response to Non-Conformance Report		
Temporary Certificate of Authorization to Occupy		
<b>Final Inspection</b>		
Record Documents		
Certification Form		
Special Inspection Documents		
Non-Conformance report		
Re-certification Form		
Response to Non-Conformance Report		
<b>Certificate of Authorization to Occupy and Use</b>		