

**Filing Systems**  
**(Also, See Project Controls Policy Manual)**

## Project Manager Filing System

### Consultant Selection

- LOI
- RFQ
- RFP
- Budget Concurrence memo
- Public announcement
- Authorization cover memo
- Selection Committee
- Proposal evaluation sheet and scoring
- Letter to selected firm
- ICE

### Design Award

- Award Documents
- Amendments
- Reallocations

### Design

- PDG Meetings
- Environmental Permits
- Design Reports (EVM)
- Project Design Schedules and Updates
- 0-15% Plans/Specs/Review Comments
- 15-30% Plans/Specs/Review Comments
- 30-60% Plans/Specs/Review Comments
- 60-90% Plans/Specs/Review Comments
- 90-100% Plans/Specs/Review Comments

- Contract Documents/Plans/Specs/Addendum/Conformed Documents
- VE Reports
- Risk Assessments
- Engineers Estimates
- IA Agreements
- PI Agreements
- Utility F.A Agreements
- MBTA F.A Agreements (TRS)
- Design Meetings
- Real Estate Acquisition
- Peer Reviews
- DPS, Fire Approvals
- Variances
- Pre bid control sheets w/back up
- Anticipated construction schedules from designer
- Change management documents and log
- Bid escrow task order

### **Construction**

- Prebid
- Notice of Award
- Pre award meetings
- Preconstruction
- NTP
- Construction baseline schedule and updates

- Schedule workshop meeting
- Progress meeting minutes
- Letters from Contractor
- Letters to Contractor
- Memo to file
- Subcontractor approvals
- Submittal log
- RFI's
- RFI Log
- Shop drawing log
- Misc correspondence (external stakeholder) to MBTA
- Misc correspondence (external stakeholder) from MBTA
- Change orders
- Construction change directives (Modifications)
- EWOL
- Claims
- Photos
- Contractor schedule of values
- Meetings (misc)
- Contract close out**
- Lessons learned
- Form 6, 7,8 &9
- Contract closeout documents

## **Misc. Files**

- AGM reports (Design)
- AGM reports (Construction)
- Budget Documents
- Contractor pay requisition
- Contractor evaluation
- Consultant evaluation
- Errors and Omissions