

# PEG/HVAC Documents Process

---

*Lot Specific / Compliance Reports | 2016*

The purpose of the proposed process change is...

**To have a single source method for Homebuilding and PEG to schedule and manage requests for HVAC documents in support of the Lot Specific program.**

- **New process will achieve the following:**
  - Replace the *Vendor Portal* as the source for PEG to get selections
  - Replace the *HVAC Website* as the source for Homebuilding and Vendors to retrieve HVAC documents
  - Replace *SmartSheet* as the source to request Compliance Reports
  - Reduce/eliminate exceptions reported by PEG (ie missing Options)
  - Reduce timing/communication issues that exist in the current process
  - Baseline the process companywide to establish consistency

- **PEG to use SchedulePro to manage schedule for ALL new requests**
  - All SchedulePro Templates/Schedules must have at least (1) PEG Task
    - **PEG Manual J**                                      Template Setup = **TEMPLATE DAY (-2)**
    - **RESCheck**    Template Setup = **TEMPLATE DAY (-5)**
    - **REMRate**    Template Setup = **TEMPLATE DAY (-5)**
    - **PEG Permit Request**                              Template Setup = **TEMPLATE DAY (-5)**
  - Back Office/CCM to manage PEG Task(s) in schedule (not the PJM)
  - PEG Task(s) must remain OPEN until document has been uploaded
  - PEG Task(s) will be COMPLETED by Back Office/CCM when retrieved
  - PEG will generate schedule for *today* and *yesterday* of all Tasks
    - NOTE: If Start Date is moved, Division to confirm Task remains on the correct day

*Timing*

<b>MANUAL J</b>	PEG to upload document <b>within 48 hours</b> of Task Scheduled Date
<b>RES CHECK/REM RATE</b>	PEG to upload document <b>within 5 days</b> of Task Scheduled Date

## For Lot Specific – Add *PEG MANUAL J* Task to Schedule Template (**Day = -2**)

Tasks: All | Sort | Sequence

NVR (CIN-KL) SF 4 BSMT 60 days Done

Task	Mon -12	Tue -11	Wed -10	Thu -9	Fri -8
Insp (Engineering/Zoning)		Start Package		Temp Power Pole	Insp (temp pole)
Insp (Landscaping Final)					Stakeout - House
Insp (Final Storm)					
Insp (Building Final)					
Insp (Final Insulation)					
Insp (Deliver Port-a-let)					
Insp (Dumpster)			PreConstruction Meeting		
Insp (Order Appliances)					
Insp (Deliver Cabinets)					
Insp (Hot Check)					
Floor Prep (non-OSB Gold Subfloor)					
Soil Poisoning					
Stakeout - Clearing			Erosion/Sediment Controls	Insp (footing PJM)	Drain Tile
Clearing			Start Date	Insp (footing)	
Scrape Lot			Excavation	Footers (Poured)	
Stake Septic					
REMRate					
RESCheck					
Delivery - Brick To Grade					
Electrical Trench					
3rd Paint					
	Mon 3	Tue 4	Wed 5	Thu 6	Fri 7
	Foundation (Poured)		Waterproofing	Groundworks	Insp (backfill)
					Insp (plumbing undergrou...)
					Steel Delivery

**Task List (Left Panel):**

- Insp (Engineering/Zoning)
- Insp (Landscaping Final)
- Insp (Final Storm)
- Insp (Building Final)
- Insp (Final Insulation)
- Insp (Deliver Port-a-let)
- Insp (Dumpster)
- Insp (Order Appliances)
- Insp (Deliver Cabinets)
- Insp (Hot Check)
- Floor Prep (non-OSB Gold Subfloor)
- Soil Poisoning
- Stakeout - Clearing
- Clearing
- Scrape Lot
- Stake Septic
- REMRate
- RESCheck
- Delivery - Brick To Grade
- Electrical Trench
- 3rd Paint

## For Compliance Reports – Add *RESCheck* or *REMRate* Task to Template (**Day = -5**)

The screenshot displays a project management software interface with a Gantt chart. The interface includes a top navigation bar with icons for home, calendar, document, leaf, people, globe, bar chart, and email. The top right corner shows the project name 'NVR (CIN-KL)', location 'SF 4 BSMT', duration '60 days', and a 'Done' button. Below the navigation bar, there are tabs for 'Tasks', 'All', 'Sort', and 'Sequence'. The main area is a Gantt chart with a task list on the left and a grid of days on the right. The task list includes: PEG Manual Js, Stakeout - Clearing, Electrical Trench, RESCheck, REMRate, 3rd Paint, and Foundation (Poured). The Gantt chart shows tasks assigned to days from -12 to 7. A red box highlights the Wednesday, Day -5 cell, which contains a 'PreConstruction Meeting' task and a blue 'REMRate' task. The 'REMRate' task is a blue bar with a white circle and the text 'REMRate'.

Day	Task
Mon -12	
Tue -11	Start Package
Wed -10	
Thu -9	Temp Power Pole
Fri -8	Insp (temp pole) Stakeout - House
Mon -7	
Tue -6	
Wed -5	PreConstruction Meeting REMRate
Thu -4	
Fri -3	
Mon -2	
Tue -1	
Wed 0	Erosion/Sediment Controls Start Date Excavation
Thu 1	Insp (footing PJM) Insp (footing) Footers (Poured)
Fri 2	Drain Tile
Mon 3	Foundation (Poured)
Tue 4	
Wed 5	Waterproofing
Thu 6	Groundworks
Fri 7	Insp (backfill) Insp (plumbing undergrou... Steel Delivery

PEG will generate *Vendor Schedule* daily for anything scheduled yesterday/today

SCHEDULEPRO Schedules Users Plants Reports Email Notifications 32 Sign Out

Vendor Schedule | Run Report Columns 13 Group By ! 6 Summary Calendar

Division	Community	Lot/Unit	Phase Activity	Task	Vendor	Schedule Date	Duration	Status	Open Issues	Last Updated	Checklist Status	House Orientation
BLW	S1	0053	188L	PEG Manual Js	*PEG LLC	4/4/2016	1	Open	0	3/30/2016	-	HOUSE ORIENTATION EAST
WMS	BQ	1028	188L	PEG Manual Js	*PEG LLC	4/5/2016	1	Open	0	3/29/2016	-	HOUSE ORIENTATION WEST
CLE	G2	0012	188L	PEG Manual Js	*PEG LLC	4/4/2016	1	Open	0	3/30/2016	-	-
WMS	SU	0017	188L	PEG Manual Js	*PEG LLC	4/5/2016	1	Open	0	3/21/2016	-	HOUSE ORIENTATION NORTHEAST
WAS	M0	0018	188L	PEG Manual Js	*PEG LLC	4/4/2016	1	Open	0	3/29/2016	-	HOUSE ORIENTATION SOUTHEAST
WAS	R3	0007A	188L	PEG Manual Js	*PEG LLC	4/5/2016	1	Open	0	-	-	HOUSE ORIENTATION EAST
WAS	L5	0458	188L	PEG Manual Js	*PEG LLC	4/5/2016	1	Open	0	3/29/2016	-	HOUSE ORIENTATION NORTH
WMS	H1	G013	188L	PEG Manual Js	*PEG LLC	4/5/2016	1	Open	0	3/28/2016	-	HOUSE ORIENTATION WEST
WAS	M0	0011	188L	PEG Manual Js	*PEG LLC	4/4/2016	1	Open	0	3/29/2016	-	HOUSE ORIENTATION SOUTHEAST
WAP	P4	0052	188L	PEG Manual Js	*PEG LLC	4/5/2016	1	Open	0	4/4/2016	-	HOUSE ORIENTATION WEST
WAP	EA	0093	188L	PEG Manual Js	*PEG LLC	4/5/2016	1	Open	0	4/4/2016	-	-
WAP	FA	0006E	188L	PEG Manual Js	*PEG LLC	4/5/2016	1	Open	0	2/24/2016	-	HOUSE ORIENTATION SOUTHWEST
WAP	QU	1009	188L	PEG Manual Js	*PEG LLC	4/5/2016	1	Open	0	4/4/2016	-	HOUSE ORIENTATION EAST
WAP	EA	0068	188L	PEG Manual Js	*PEG LLC	4/4/2016	1	Open	0	4/4/2016	-	HOUSE ORIENTATION WEST
WAN	B8	C015	188L	PEG Manual Js	*PEG LLC	4/4/2016	1	Open	0	-	-	HOUSE ORIENTATION WEST
WAN	VB	Y004	188L	PEG Manual Js	*PEG LLC	4/4/2016	1	Open	0	3/30/2016	-	HOUSE ORIENTATION SOUTHEAST
WAN	AT	0079	188L	PEG Manual Js	*PEG LLC	4/4/2016	1	Open	0	-	-	HOUSE ORIENTATION SOUTH
WAD	DO	4009D	188L	PEG Manual Js	*PEG LLC	4/4/2016	1	Open	0	4/4/2016	-	-
WAD	H5	0597	188L	PEG Manual Js	*PEG LLC	4/5/2016	1	Open	0	-	-	-
WAD	H4	0362	188L	PEG Manual Js	*PEG LLC	4/5/2016	1	Open	0	3/2/2016	-	HOUSE ORIENTATION WEST
VAW	1W	1038A	188L	PEG Manual Js	*PEG LLC	4/4/2016	1	Open	0	3/14/2016	-	HOUSE ORIENTATION WEST
VAW	1W	1040A	188L	PEG Manual Js	*PEG LLC	4/4/2016	1	Open	0	3/14/2016	-	HOUSE ORIENTATION WEST
CIN	DM	0016	188L	PEG Manual Js	*PEG LLC	4/4/2016	1	Open	0	3/25/2016	-	-

- **PEG to use SchedulePro to obtain Options for job to be reviewed**
  - Will no longer use *Vendor Portal* to get Option selections from SAR
    - SchedulePro is updated automatically each night with any Option changes
  - Back Office/CCM is responsible to confirm all necessary HVAC Options are keyed on new Sales **PRIOR to Finalizing in Atlas**
  - If required Options are missing for PEG to complete review:
    - PEG Reviewer will add a NOTE to the PEG Task of missing Options
    - It will be the responsibility of the DIVISION to correct the missing Option
    - It will be the responsibility of the DIVISION to re-schedule the Task to a future date for the Task to appear on PEGs daily Vendor Schedule. **Delivery timing will reset.**

*Required Options for PEG to perform analysis*

<b>HOUSE ORIENTATION</b>	Example: 555XA26, 555XA27, etc
<b>FURANCE EFFICIENCY</b>	Example: 8FB, 8FI, etc
<b>SEER RATING</b>	Example: 8AM, 8AI, etc



## Access Selected Options by clicking the ‘Options’ button within the Lot Schedule

The screenshot shows a software interface with a calendar view. An 'Options' button is highlighted in a red circle in the top left corner. A modal window titled 'Options' is open, displaying a table of HVAC options. The 'Options' button in the modal is also highlighted in a red circle. The table lists various HVAC units with columns for ID, Option, Description, Location, Date Inserted, and Last Data-Feed Run.

ID	Option	Description	Location	Date Inserted	Last Data-Feed Run
	HVAC				
555XA33	Hvac	House Orientation Northwest		11/11/2015 10:56 PM	4/6/2016 11:53 PM
8AI	Hvac	Air Conditioning 14seer System Zone 1		11/11/2015 10:56 PM	4/6/2016 11:53 PM
8CV	Hvac	Equipment Pkg Vertical Coil Zone 1		11/11/2015 10:56 PM	4/6/2016 11:53 PM
8FB	Hvac	92% Efficiency Gas Furnace System Zone 1		11/11/2015 10:56 PM	4/6/2016 11:53 PM
8GB	Hvac	Equipment Pkg Gas G2 System Zone 1		11/11/2015 10:56 PM	4/6/2016 11:53 PM
8VB	Hvac	Returns At Bedrooms		11/11/2015 10:56 PM	4/6/2016 11:53 PM
8VX	Hvac	80 Cfm Fan Bath		11/11/2015 10:56 PM	4/6/2016 11:53 PM
8VY	Hvac	Whole House Ventilation Fan Bath		11/11/2015 10:56 PM	4/6/2016 11:53 PM
8ZD	Hvac	Climate Zone 4		11/11/2015 10:56 PM	4/6/2016 11:53 PM

- **PEG to use SchedulePro to upload completed HVAC documents**
  - Will no longer use the *HVAC Website* to upload documents
  - PEG will attach completed HVAC documents to **‘HVAC ROUGH’** Task
    - File Name Format = [DOCUMENT TYPE] – [DIV-COMM-LOTUNIT]  
(i.e. “MANUAL J – NVP-FF-0009A”)
  - PEG will add a NOTE to **‘HVAC ROUGH’** Task confirming upload
    - Note Format = [DOCUMENT TYPE] COMPLETE – [CURRENT DATE]  
(i.e “MANAUL J COMPLETE - 04/05/2016”)
  - Back Office/CCM to COMPLETE PEG Task once document is retrieved
  - Back Office/CCM will process Atlas Internal Change Order to change HVAC package on job on or before Estimate Lock/PO Generation  
(i.e. within 7 Days of Start Date)

Use **FIND** to locate job to **UPLOAD** document; attach document under *Documents*

The screenshot displays the SCHEDULEPRO interface. At the top, there are navigation icons for Schedules, Users, Plants, Reports, and Email. A search bar at the top right contains the text '0009A'. Below the navigation is a 'Vendor Schedule' section with a 'Run Report' button. A table lists various HVAC tasks, with the row for 'NVP-FF-0009A' highlighted. A modal window titled 'HVAC - Rough - NVP-FF-0009A' is open, showing a 'Documents' tab with a table of attached files. The file 'Manual J - NVP-FF-0009A.pdf' is listed with a date of 4/5/2016 and author Ben Mucci. An 'Attach Document' button is visible at the bottom of the modal.

Division	Community	Lot/Unit	Phase Activity	Task	Vendor	Schedule Date	Duration	Status	Open Issues	Last Updated	Checklist Status	House Orientation
VAM	Q2	1140A	188L	HVAC - Rough	*PEG LLC	4/5/2016	1	Open	0	4/1/2016	-	HOUSE ORIENTATION SOUTH
NVP	FF	0009A	188L	HVAC - Rough	*PEG LLC	4/5/2016	2	Open	0	4/4/2016	-	-
NVP	FF	0008A	188L	HVAC - Rough	*PEG LLC	4/4/2016	2	Open	0	4/4/2016	-	HOUSE ORIENTATION WEST
RHD	HX	5090										-
CTC	S3	0279										HOUSE ORIENTATION NORTH
DCY	W7	8951										-
DCY	AW	0060										-
CTN	CQ	1006C										HOUSE ORIENTATION EAST
CTN	CQ	1006B										HOUSE ORIENTATION EAST
CVL	OK	0143										-
CVL	SG	0407										-
CTN	CQ	1006A										HOUSE ORIENTATION EAST
CTS	BT	1016D										HOUSE ORIENTATION WEST
MDE	GB	0007										HOUSE ORIENTATION NORTHEAST
MDE	TN	0212A	188L	HVAC - Rough	*PEG LLC	4/5/2016	2	Open	0	3/24/2016	-	HOUSE ORIENTATION SOUTHEAST
MDC	BD	3080A	188L	HVAC - Rough	*PEG LLC	4/4/2016	2	Open	0	3/25/2016	-	HOUSE ORIENTATION SOUTHEAST
WAW	XW	4001K	188L	HVAC - Rough	*PEG LLC	4/5/2016	2	Open	0	3/24/2016	-	-
MDE	M7	1037	188L	HVAC - Rough	*PEG LLC	4/5/2016	2	Open	0	3/30/2016	-	HOUSE ORIENTATION EAST
MDE	29	0081	188L	HVAC - Rough	*PEG LLC	4/4/2016	2	Open	0	4/4/2016	-	HOUSE ORIENTATION NORTHWEST
MDC	RE	0083	188L	HVAC - Rough	*PEG LLC	4/4/2016	2	Open	0	2/16/2016	-	HOUSE ORIENTATION NORTHEAST
WAW	5N	2085	188L	HVAC - Rough	*PEG LLC	4/5/2016	2	Open	0	3/31/2016	-	HOUSE ORIENTATION NORTHEAST
WAW	XW	4001J	188L	HVAC - Rough	*PEG LLC	4/5/2016	2	Open	0	3/25/2016	-	-
WAS	M9	0011	188L	HVAC - Rough	*PEG LLC	4/4/2016	2	Open	0	3/15/2016	-	HOUSE ORIENTATION NORTH

Once document uploaded, add a **Task Note** to provide notification to the Division

The screenshot shows a software interface with a table of tasks and a modal window. The table has columns for Division, Community, Lot/Unit, Phase Activity, Task, Vendor, Schedule Date, Duration, Status, Open Issues, Last Updated, and Checklist Status. The modal window is titled "PEG Manual Js - BLN-GG-0023" and has tabs for Detail, Notes, Issues, Documents, and Vendors. The "Notes" tab is selected and circled in red. The modal contains the text "No notes have been created for this task." and an "Add Note" button, which is also circled in red. A "Close" button is located next to the "Add Note" button.

Division	Community	Lot/Unit	Phase Activity	Task	Vendor	Schedule Date	Duration	Status	Open Issues	Last Updated	Checklist Status
BLH	PF	0027A	188L	Blower Door Test	PEG LLC	4/6/2016	±	Complete	0	4/7/2016	-
BLH	PA	0011	188L	Blower Door Test	PEG LLC	4/7/2016	±	Complete	0	4/7/2016	-
BLH	AR	0011	188L	Blower Door Test	PEG LLC	4/7/2016	±	Complete	0	4/7/2016	-
BLH	AR	0011	188L	Blower Door Test	PEG LLC	4/7/2016	±	Complete	0	4/7/2016	-
BLH	AR	0011	188L	Blower Door Test	PEG LLC	4/7/2016	±	Complete	0	4/7/2016	-
BLH	PF	0027A	188L	Blower Door Test	PEG LLC	4/6/2016	±	Complete	0	4/7/2016	-
BLN	GG	0023	188L	Blower Door Test	PEG LLC	4/7/2016	±	Complete	0	4/7/2016	-
BLN	RF	0011	188L	Blower Door Test	PEG LLC	4/7/2016	±	Complete	0	4/7/2016	-
BLN	GG	0023	188L	Blower Door Test	PEG LLC	4/7/2016	±	Complete	0	4/7/2016	-
BLN	RF	0011	188L	Blower Door Test	PEG LLC	4/7/2016	±	Complete	0	4/7/2016	-
BLH	RF	0011	188L	Blower Door Test	PEG LLC	4/7/2016	±	Complete	0	4/7/2016	-
BLN	GL	0011	188L	Blower Door Test	PEG LLC	4/7/2016	±	Complete	0	4/7/2016	-
BLN	M5	0011	188L	Blower Door Test	PEG LLC	4/7/2016	±	Complete	0	4/7/2016	-
BLN	M5	0011	188L	Blower Door Test	PEG LLC	4/7/2016	±	Complete	0	4/7/2016	-
BLN	M5	0011	188L	Blower Door Test	PEG LLC	4/7/2016	±	Complete	0	4/7/2016	-
BLH	GZ	0134A	188L	Duct Blaster Test	PEG LLC	4/5/2016	±	Complete	0	4/7/2016	-
BLH	GZ	0134B	188L	Duct Blaster Test	PEG LLC	4/6/2016	±	Complete	0	4/7/2016	-
BLH	M5	0162	188L	Duct Blaster Test	PEG LLC	4/5/2016	±	Complete	0	4/5/2016	-
BLN	GZ	0134C	188L	Duct Blaster Test	PEG LLC	4/7/2016	1	Open	0	3/2/2016	-
BLN	GG	0023	188L	RESCheck	PEG LLC	4/7/2016	1	Open	0	4/4/2016	-

The *Daily Summary* notification will show all new documents that were uploaded

Daily Summary Report		Connaghan, Sean	
		4/7/16	
▶ Schedule Changes			
▶ New/Updated Issues <b>156</b>			
▶ Aging Issues <b>186</b>			
▼ <b>Notes</b> <b>243</b>			
PGS-RY-0335	When is this starting????	ABC/BRADCO SUPPLY CORP	
4/7/2016 1:07 PM	Richard Walsh		Siding (w/Stone)
PHW-WA-0076B	Missing corner bullnose and lastella Please rehang doors that were removed	ADVANCED FLOORING & DESIGN	
4/7/2016 9:20 AM	David McDade		Ceramic Surrounds
WAW-S1-7010	Did not start today	ATLAS PLUMBING LLC	
4/7/2016 12:28 AM	Rodolfo Romero		Plumb - Rough
WAW-S1-7011	Plumber did not install test, advised him of the inspection on Monday.	ATLAS PLUMBING LLC	
4/7/2016 12:35 AM	Rodolfo Romero		Insp (Gas RI)
RHW-FC-1Q32	Kitchen has Tile Backsplash, template accordingly	BIASE CORPORATION	
4/7/2016 8:47 AM	Zachary Lapinski		Granite Tops - Template
RHW-FC-3W09	DO NOT install backsplash at kitchen, homeowner does not want it	BIASE CORPORATION	
4/7/2016 8:48 AM	Zachary Lapinski		Granite Tops - Install
RHW-FC-3W09	Homeowner does not want 4" granite backsplash in the kitchen, please template accordingly	BIASE CORPORATION	
4/7/2016 8:47 AM	Zachary Lapinski		Granite Tops - Template

Summary for Sean Connaghan 04.07.2016

0	243
Schedule Changes	Notes
156	186
New / Updated Issues	Aging Issues

[View Your Daily Summary](#)

From Schedule Summary, click *Documents* button to view all uploaded documents

The screenshot shows the SCHEDULEPRO software interface. At the top, there is a navigation bar with icons for Schedules, Templates, Community, DUC, Users, Plants, Vendor, Reports, Email, and Admin. The 'Vendor' icon is circled in red. Below the navigation bar is a table with columns: Division, Comm Desc, Lot/Unit, Start, Proj PSD, Allowed DUC, Current Int Task, Open Issue(s), PJM Checklist, DUC (Over)/Under, Updated, and QAI Score. A 'Documents' modal window is open, displaying a table of documents with columns: DCLU, Task, Issue, Author, Date, and File. The document shown is for 'BLH-W9-0001D' with the task 'Granite Tops - Install' and the issue 'Kitchen island top left in unit not installed.'.

Division	Comm Desc	Lot/Unit	Start	Proj PSD	Allowed DUC	Current Int Task	Open Issue(s)	PJM Checklist	DUC (Over)/Under	Updated	QAI Score
BLH	W9	0001P	10/28/2015	4/1/2016	118	Blower Door Test	0	4	-14	4/1/2016	95.53
BLH	AR	0286E	12/18/2015	4/4/2016	69	Settlement	0	4	0	4/4/2016	93.57
BLH	AR	0299A	1/29/2016	5/6/2016	67	Granite Tops - Template	0	4	0	4/5/2016	-
BLH	AR	0291D	12/30/2015	4/21/2016	76	3rd Paint	0	4	0	4/6/2016	-
BLH	AR	0291A	12/30/2015	4/14/2016	68	3rd Paint	0	4	+3	4/6/2016	-
BLH	AR	0291C	12/30/2015	4/19/2016	71	Blue Tape- Paint	0	4	+3	4/6/2016	-
BLH	AR	0291B	12/30/2015	4/19/2016	70	Blue Tape- Paint	0	4	+5	4/6/2016	-
BLH	AR	0291E	12/30/2015	4/19/2016	73	Blue Tape- Paint	0	4	-8	4/5/2016	-
BLH	AR	0291F	12/30/2015	4/19/2016	74	Blue Tape- Paint	0	4	-3	4/5/2016	-
BLH	AR	0291G	12/30/2015	4/19/2016	75	Blue Tape- Paint	0	4	+3	4/5/2016	-
BLH	AR	0291H	12/30/2015	4/19/2016	76	Blue Tape- Paint	0	4	+2	4/5/2016	-
BLH	AR	0291I	12/30/2015	4/19/2016	77	Blue Tape- Paint	0	4	+4	4/5/2016	-
BLH	AR	0295D	2/12/2016	5/23/2016	68	Attic Insulation	0	4	0	4/5/2016	-
BLH	AR	0299C	1/29/2016	5/10/2016	65	Trim	0	4	+4	4/5/2016	-
BLH	CS	0003	1/6/2016	4/21/2016	71	Blue Tape- Paint	0	4	-3	4/5/2016	-
BLH	CS	0004	12/30/2015	4/29/2016	81	Fireplace Startup	0	4	0	4/6/2016	-
BLH	CS	0005	2/10/2016	5/19/2016	65	Resilient Floors	0	4	0	4/7/2016	-
BLH	CS	0008	2/18/2016	5/18/2016	60	Drywall Pointup	0	4	0	4/7/2016	-
BLH	CS	0010	3/9/2016	6/24/2016	73	HVAC - Rough	0	4	0	4/6/2016	-
BLH	MS	0010	11/23/2015	2/25/2016	61	-	0	4	0	4/6/2016	93.41
BLH	PA	0211	3/14/2016	6/16/2016	65	HVAC - Rough	0	4	0	4/7/2016	-
BLH	PA	0212	3/16/2016	6/16/2016	63	Garage Doors	0	4	0	4/7/2016	-

DCLU	Task	Issue	Author	Date	File
BLH-W9-0001D	Granite Tops - Install	Kitchen island top left in unit not installed.	Kevin Williams	3/8/2016	image.jpg

## Once HVAC Document is retrieved, Back Office/CCM COMPLETE the PEG Task

The screenshot displays a software interface with a calendar grid in the background. A modal dialog box titled "PEG Manual Js" is open, showing details for a task. The dialog has tabs for "Detail", "Notes", "Issues", "Documents", and "Vendors". The "Detail" tab is selected, showing the following information:

- Type:** Critical
- Category:** Interior
- Baseline Date:** 10/20/2015
- Baseline Duration:** 1
- Phase Activities:** Energy Efficiency Test (188L)
- Options:** No options are associated with this task.

At the bottom of the dialog, there are several controls:

- Schedule Date:** 10/20/2015
- Duration (Days):** 1
- Status Buttons:** "Unlocked" (selected), "Locked", "Open", and "Complete" (highlighted with a red circle).
- Action Buttons:** "Update" and "Close".

- **Homebuilding to use SchedulePro for rework requests**
  - Will no longer email PEG Help Desk for rework requests
  - Rework requests to be scheduled by logging an **ISSUE** on the PEG Task
  - CCM to review all late Change Orders for potential impact to package

**Required fields when logging an Issue for PEG:**

<u>Status:</u>	<b>OPEN</b>
<u>Location:</u>	<b>HVAC</b>
<u>Vendor:</u>	<b>PEG LLC</b>
<u>Category:</u>	<b>HVAC – REWORK REQUEST</b>
<u>Issue Description:</u>	<b>Provide a brief description of changes</b>



Select PEG Task from Lot Schedule; click *Issues* tab; click *Add Issue*

The screenshot displays a software interface for task scheduling. On the left, a calendar view shows dates Nov 18, 2015 (Thu) and Nov 25, 2015 (Thu). The task 'PEG Manual Js' is highlighted on Nov 18. To the right, a list of tasks is visible, including 'Erosion/Sediment Control', 'Stakeout - House', and 'Temp Drive'. A modal window titled 'PEG Manual Js' is open in the foreground, featuring tabs for 'Detail', 'Notes', 'Issues', 'Documents', and 'Vendors'. The 'Issues' tab is selected and circled in red. The modal content area displays the message 'No issues have been created for this task.' At the bottom of the modal, the 'Add Issue' button is circled in red, along with a 'Close' button.

## Complete the required fields to log the ISSUE and schedule the Rework Request

The screenshot displays a software interface with a 'New Issue' dialog box. The dialog box is titled 'New Issue' and has a close button (X) in the top right corner. It contains the following fields:

- Status:** A dropdown menu with 'Open' selected.
- Location:** A text input field containing 'HVAC'.
- Vendor:** A dropdown menu with '\*PEG LLC(0010003515)' selected.
- Category:** A dropdown menu with 'HVAC - Rework Request' selected.
- Issue Description:** A text area containing the text: 'Late Change Order adding a Finished Basement. Please review job again and produce an updated Manual J'.

Below the text area, there is a message: 'No documents have been attached to this issue.' At the bottom of the dialog, there are three buttons: 'Create' (highlighted in purple), 'Cancel' (grey), and 'Attach Document' (purple).

## PEG to generate an *Issues Report* daily; filter on all OPEN Issues

The screenshot shows the SCHEDULEPRO interface. At the top is a navigation bar with icons for Schedules, Templates, Community, DUC, Users, Plants, Vendor, Reports, Email, Surveys, Admin, Notifications, and Sign Out. Below this is a sub-header for 'Issues Report' with a 'Run Report' button and filters for 'Columns', 'Status' (set to 'Open'), and 'Group By'. The main table has the following columns: Division, Community, Lot/Unit, Author, Vendor, Task, Category, Location, Description, Status, Update Date, and Age. One row is highlighted with a red border:

Division	Community	Lot/Unit	Author	Vendor	Task	Category	Location	Description	Status	Update Date	Age
BLH	AR	0282A	Sean Connaghan	PEG LLC	PEG Manual Js	Post Installation Damage	HVAC	Late Change Order added Finished Basement. Please review again a...	Open	4/5/2016	0

### Rework Request Timing

**MANUAL J**

PEG to upload document **within 48 hours** of Issue Create Date

**RES CHECK/REM RATE**

PEG to upload document **within 5 days** of Issue Create Date

- **Homebuilding to use SchedulePro to request Compliance Reports**

- Will no longer use *SmartSheet* to make requests for reports
- Process to request RESCheck/REMRate documents:

- Step 1** Back Office/CCM create and Finalize Spec MSS in Atlas for job(s) to be scheduled
- Step 2** In UCS, enter a *Projected Delivery Date* for Spec using the Settlement/Reserves – Change Settlement Date Program (R/C)
- Step 3** The following day schedule will be created automatically and PEG Task assigned
- Step 4** Back Office/CCM can provide any detail/notes for PEG using PEG Task
- Step 5** Back Office/CCM can move PEG Task to desired date for PEG to pick up on daily Vendor Schedule
- Step 6** PEG will upload completed document ***within 5 days of Task Scheduled Date***  
(NOTE: Document will be uploaded to **HVAC ROUGH** Task and NOTE added to notify Division)
- Step 7** Back Office/CCM retrieve Compliance Report from HVAC ROUGH Task;  
COMPLETE PEG Task
- Step 8** If Division wishes to sell Lot using Spec MSS, no further action needed  
If Division wishes to sell Lot as normal Sale, Back Office/CCM can Delete Spec MSS

## In Atlas, Create and Finalize Spec(s) on Lot(s) to be reviewed by PEG

COMMUNITY: CHELSEA KNOLLS - CS

Home Community Info Standards/Incentives Sales Contracts **Alternate Sale Types** Community Access Community Contacts

Specs Models What-ifs Help

### Specs in this Community

Configure New Spec MSS:  Create Spec

Export to Excel

Product	Lot	Description	Net Sales Price	Spec Type	Status	Action
PALERMO	BM01	COMPLIANCE REPORT	559990	Designed	Final	🔍 ✕
SPRINGHAVEN		Bug 25829	584990	Designed	Open	🔍 ✕

Page 1 of 1 Displaying 1 - 2 of 2

Back Continue

Logged in as: NVR\bmucci  
Application: Atlas UAT 3.4.5  
Server: VMDCPRES01UAT

Copyright © NVR, Inc. All Rights Reserved.

In UCS, enter *Projected Delivery Date* for Lot(s) in order for Schedule to be created

Esc=Update      F3=Scroll Forward      F4=Scroll Backward      Ctrl-C=Cancel

----- Quick Change - Projected Delivery Date -----

COMM	LOT	Unit	Customer Name	Construct Status	Contract Delivery	Projected Delivery
CS	BM01			P		
CV	0001			P		
CV	0002			P		
CV	0003			P		
CV	0004			P		
CV	0005			P		
CV	0006			P		
CV	0007			P		
CV	0008			P		
CV	0009			P		
CV	0010			P		

The total number of jobs is: 262  
 Enter projected delivery date.

The following day, Find Task in Schedule and change Schedule Date if needed

The screenshot displays a software interface for task management. A search bar at the top right contains the text "RES". A modal dialog titled "RESCheck" is open, showing details for a task named "Efficiency Test (188L)".

Inside the "RESCheck" dialog, there is a calendar for April 2016. The date 7/7/2015 is entered in the "Schedule" field and is circled in red. The "Duration (Days)" is set to 1. There are "Update" and "Close" buttons at the bottom of the dialog. The background shows a list of tasks with various dates and categories.

PEG will generate *Vendor Schedule* daily for anything scheduled yesterday/today

SCHEDULEPRO Schedules Users Reports Email Notifications 34 Sign Out

Vendor Schedule | Run Report Columns 12 Group By ! [edit] [print] [checkbox]

Summary Calendar [share]

REMRate (42)	Division	Community	Lot/Unit	Phase Activity	Task	Vendor	Schedule Date	Duration	Status	Open Issues	Last Updated	Checklist Status
	BLN	GG	0023	188L	REMRate	*PEG LLC	4/7/2016	1	Open	0	4/4/2016	-
	WAN	B8	C015	188L	REMRate	*PEG LLC	4/7/2016	1	Open	0	4/6/2016	-
	BLN	M5	0161	188L	REMRate	*PEG LLC	4/5/2016	1	Open	0	4/4/2016	-
	DCY	EW	S073	188L	REMRate	*PEG LLC	4/6/2016	1	Open	0	3/15/2016	-
	NVP	MN	0023	188L	REMRate	*PEG LLC	4/6/2016	1	Open	0	4/5/2016	-
	NJS	EP	B001E	188L	REMRate	*PEG LLC	4/5/2016	1	Open	0	3/14/2016	-
	NJS	EP	B001F	188L	REMRate	*PEG LLC	4/5/2016	1	Open	0	3/14/2016	-
	NJS	EP	B001G	188L	REMRate	*PEG LLC	4/5/2016	1	Open	0	3/14/2016	-
	NJC	OB	0019	188L	REMRate	*PEG LLC	4/5/2016	1	Open	0	2/9/2016	-
	NJC	CC	0015C	188L	REMRate	*PEG LLC	4/7/2016	1	Open	0	3/14/2016	-
	MDC	TR	0101	188L	REMRate	*PEG LLC	4/7/2016	1	Open	0	4/5/2016	-
	CTN	VV	1138	188L	REMRate	*PEG LLC	4/5/2016	1	Open	0	-	-
	MDC	CC	0042	188L	REMRate	*PEG LLC	4/7/2016	1	Open	0	4/5/2016	-
	MDC	TO	0071A	188L	REMRate	*PEG LLC	4/7/2016	1	Open	0	4/5/2016	-
	MDC	CL	0204	188L	REMRate	*PEG LLC	4/7/2016	1	Open	0	4/5/2016	-
	MDC	TO	0064A	188L	REMRate	*PEG LLC	4/7/2016	1	Open	0	4/5/2016	-
	MDC	BE	3041	188L	REMRate	*PEG LLC	4/7/2016	1	Open	0	4/5/2016	-
	MDC	F2	0460A	188L	REMRate	*PEG LLC	4/6/2016	1	Open	0	4/5/2016	-
	DES	PP	0219	188L	REMRate	*PEG LLC	4/7/2016	1	Open	0	3/18/2016	-
	DES	RD	0052	188L	REMRate	*PEG LLC	4/7/2016	10	Open	0	3/18/2016	-
	WAS	R3	0007A	188L	REMRate	*PEG LLC	4/6/2016	1	Open	0	4/5/2016	-
	DEL	HC	0296	188L	REMRate	*PEG LLC	4/6/2016	1	Open	0	3/15/2016	-
	DEL	PE	0300	188L	REMRate	*PEG LLC	4/6/2016	1	Open	0	4/4/2016	-



# NEXT STEPS...

---

*PEG/HVAC Documents Process | 2016*

## New process to begin for all new requests as of [05/02/2016]

- Confirm CCM/Admin access to SchedulePro by [04/22/2016]
- Complete necessary updates to Schedule Templates by [04/28/2016]
  - **Participating Communities** (*PEG process*) – Ensure correct PEG Task is ADDED
  - **Non-Participating Communities** (*using worst-case*) – Ensure PEG Task is REMOVED
- Confirm all jobs to be reviewed by PEG are on schedule by [04/28/2016]
- Communicate to HVAC Vendors change of file location by [04/28/2016]
- PEG to generate both *Vendor Schedule* and *Issues Report* daily beginning week of [05/02/2016]

*Questions/Comments?*



