|  |  |
| --- | --- |
| **Date:** | insert date |
| **To:** | Secretary Name |
| **From:** | PM name |
| **Project Number** | project number |

**Please set-up file folders with the following header names** (as checked) **for the above referenced project number.**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Pale Green | | | | **PG**  **ADMINISTRATION** |
| **Check if Required** | | | | **Folder Title and Contents** |
|  | | **PG1** | | **Project Financials** |
|  | |  | |  |
|  | | **PG1.1** | | **Project Tracking Folder** |
|  | |  | |  |
|  | | **PG2** | | **A/E Invoice Folder** |
|  | |  | |  |
|  | | **PG2.1** | | **A/E**  **In - Correspondence** |
|  | |  | |  |
|  | | **PG2.2** | | **A/E**  **Out – Correspondence** |
|  | |  | |  |
|  | | **PG3** | | **CA Invoice Folder** |
|  | |  | |  |
|  | | **PG3.1** | | **CA**  **In - Correspondence** |
|  | |  | |  |
|  | | **PG3.2** | | **CA**  **Out - Correspondence** |
|  | |  | |  |
|  | | **PG4** | | **Other Contracts Invoices Folder** |
|  | |  | |  |
|  | | **PG4.1** | | **Other**  **In-Correspondence** |
|  | |  | |  |
|  | | **PG4.2** | | **Other**  **Out-Correspondence** |
|  | |  | |  |
|  | | **PG5** | | **Agency**  **In - Correspondence** |
|  | |  | |  |
|  | | **PG5.1** | | **Agency**  **Out - Correspondence** |
|  | |  | |  |
|  | | **PG6** | | **Legal of**  **In-Correspondence** |
|  | |  | |  |
|  | | **PG6.1** | | **Legal of**  **Out-Correspondence** |
|  | |  | |  |
|  | | **PG7** | | **Evaluations Folder** |
|  | |  | | (Orange Sticker) |
| Green | | | | **G**  **INITIATION / SELECTION /**  **CONTRACT PHASES** | |
| **Check if Required** | | | | **Folder Title and Contents** | |
|  | | **G1** | | Project Initiation | |
|  | |  | |  | |
|  | | **G2** | | **A/E Selection** | |
|  | |  | |  | |
|  | | **G2.1** | | **A/E Contract Folder** | |
|  | |  | |  | |
|  | | **G3** | | **CA Selection** | |
|  | |  | |  | |
|  | | **G3.1** | | **CA Contract Folder** | |
|  | |  | |  | |
|  | | **G4** | | **Other Contract Selections Folder** | |
|  | |  | |  | |
|  | | **G4.1** | | **Other Contracts Folder** | |
|  | |  | |  | |

|  |  |  |
| --- | --- | --- |
| Blue | | B  DESIGN PHASES |
| **Check if Required** | | **Folder Name and Contents** |
|  | B1 | **Pre-Design** |
|  |  |  |
|  | B2 | **Schematic-Design** |
|  |  |  |
|  | B3 | **Design Development** |
|  |  |  |
|  | B4 | **Construction Documents** |

|  |  |  |
| --- | --- | --- |
| **Red** | | **R**  **BID PHASE** |
| **Check if Required** | | **Folder Name and Contents** |
|  | **R1** | **Permits / Approvals / Agreements Folder** |
|  |  |  |
|  | **R2** | **Bid Folder** |
|  |  |  |
|  | R3 | Contract Award Folder |

|  |  |  |
| --- | --- | --- |
| Yellow | | **Y H**  (Hartford)  **CONSTRUCTION PHASE** |
| **Check if Required** | | **Folder Name and Contents** |
|  | YH1 | **Construction Reports / Meeting Minutes** |
|  |  |  |
|  | YH2 | **Payment** |
|  |  |  |
|  | YH3 | **Change / Clarification** |
|  |  |  |
|  | YH4 | **Testing / Inspection Reports** |
|  |  |  |
|  | **YH5** | Submittals |
|  |  |  |
|  | **YH6** | **Issue File** |
|  |  |  |
|  | **YH7** | Project Close-Out |

|  |  |  |
| --- | --- | --- |
| Yellow | | **Y F**  (Field)  **CONSTRUCTION PHASE** |
| **Check if Required** | | **Folder Name and Contents** |
|  | YF1 | **Construction Reports / Meeting Minutes** |
|  |  |  |
|  | YF2 | **Payment** |
|  |  |  |
|  | YF3 | **Change / Clarification** |
|  |  |  |
|  | YF4 | **Testing / Inspection Reports** |
|  |  |  |
|  | **YF5** | Submittals |
|  |  |  |
|  | **YF6** | **Issue File** |
|  |  |  |
|  | **YF7** | Project Close-Out |

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|  |  |  |  |  |
| *(Print PM Signature)* |  | *(PM Signature)* |  | *(Date)* |

|  |  |
| --- | --- |
| **cc:** | File: Insert Project Number G1 |