

CPFM Department: Business & Finance	SOP Number: CPFM-BF-3
	Effective Date: 11/1/2025
Title: Developing a Construction in Progress (CIP) Account	Revision Date: 1 year
	End Date: Indefinite
Signature:  Digitally signed by Dean Tufts Date: 2025.11.03 12:24:15 -05'00'	Dean Tufts, Vice President Campus Planning & Facilities Management (CPFM)

PROCEDURE: Developing a Construction in Progress (CIP) account.

PURPOSE: To provide the procedures for creating and documenting CIPs for projects.

PROCEDURE: To create a CIP, the project manager completes the Project Request Form (PRF) that can be found under the *Project Required Forms* menu on the *Forms and Documents* page on the Business & Finance (B&F) website (case.edu/facilities/departments/business-finance/forms-and-documents). The project manager then emails the completed PRF to prfs@case.edu. B&F will review the form **within 3 business days** and discuss it with the project manager.

After submitting the PRF to B&F, CPFM project managers will create a new project folder on the shared drive (S:\Active File Projects) using the new project folder template. The folder will be named using the following naming convention *CIP Number – Project Name – 3 letters of the project manager’s CWRU network ID*. B&F will create folders for project managers outside of the CPFM organization. Since CIP numbers are not assigned until the PRF is approved, new projects will use the temporary CIP number 999999 as a placeholder. Once the folder is created, it becomes the central depository for all information about the CIP. This process should be completed **within 1 business day**.

Following B&F’s review of the PRF for accuracy, the PRF is set up in DocuSign and routed through the approval workflow. The approval workflow is based on the value of the project and the sponsoring department. The process of setting the PRF up in DocuSign should be completed **within 1 business day**.

Once the approval workflow is complete, Business & Finance receives an automated message from DocuSign. Upon receipt of this message, Business & Finance will finalize the PRF. The DocuSign approval process timeline can vary depending on the level of approval required but should be completed **within 5 business days**. If over 5 business days have elapsed, B&F will investigate why it’s delayed.

Finalizing the PRF includes B&F assigning a CIP number and the Controller’s Office creating the CIP account within PeopleSoft. Once complete, B&F saves the finalized PRF to the S:\ drive and records the financial data and approval data in the CIP master tracker. B&F then sends the finalized PRF to the project manager, the AVP for Construction, the AVP for Facilities Services, the AVP for Planning & Design, the Office of Energy & Sustainability, the Office of the Controller, the Office of Environmental Health & Safety, and the Office of Procurement and Distribution Services. This process is expected to be completed **within 1 business day**.