

DecisionOps Draw Review Sample Packet v0.2

Prepared by Framework Advisory

Project: ACME Commercial Fit-Out

Trade / Vendor: Sample Mechanical Subcontractor

Invoice / Draw #: Draw 004

Invoice Amount: \$86,400

Review Date: May 13, 2026

Prepared for: Sample GC / Controller

Review Status: REVIEW

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Sample packet for demonstration purposes only.

This packet is based on fictional/redacted information and does not represent a real client review.

Important Scope Note

Framework Advisory provides documentation review, evidence organization, and decision-support materials based on documents supplied by the client. This packet does not provide legal advice, accounting advice, audit assurance, financial advice, or payment direction. Final payment, holdback, dispute, and legal decisions remain the responsibility of the client and their qualified advisors.

1. Executive Summary

Overall Review Status: REVIEW

Based on the sample documents reviewed, this draw package is not yet fully supported for clean internal approval. The main issues are missing approval evidence, inconsistencies between claimed progress and supporting documentation, and backup items that should be resolved before the package is treated as ready for internal review.

Priority	Issue	Status	Recommended Action
High	Claimed progress does not clearly match SOV/ supporting evidence	REVIEW	Request PM/site confirmation and updated SOV backup
High	Change order amount included without clear approval	HOLD / REVIEW	Request signed change order or written approval
Medium	Holdback figure needs confirmation	REVIEW	Recalculate against contract/invoice basis
Medium	Approval chain incomplete	REVIEW	Confirm who approved scope, progress, and release
Medium	Deficiency/backcharge notes not reconciled	REVIEW	Confirm whether deductions apply before release

2. Controller Action Box

Recommended Internal Action:

Do not treat this sample package as cleanly supported until the missing documents and approval questions below are resolved.

Before release, request:

1. PM or site confirmation of actual progress completed.
2. Updated SOV showing approved current progress.
3. Signed or written approval for any change order included in the draw.
4. Confirmation of holdback calculation.
5. Confirmation of whether deficiencies, credits, or backcharges affect payment.
6. Written approval from the person authorized to release payment.

Suggested internal note:

"Package reviewed for documentation completeness and visible inconsistencies. Payment decision pending confirmation of progress support, change-order approval, and holdback basis."

3. Inputs Reviewed

Document	Provided?	Notes
Subcontractor invoice	Yes	Draw 004 submitted for sample review
Schedule of Values / progress billing	Yes	SOV included, but progress support requires confirmation
Change orders	Partial	One change-order amount appears in the draw but approval backup is incomplete
PM approval / site confirmation	No	Written progress confirmation not included in the sample package
Deficiency list / backcharge notes	Partial	Deficiency note referenced but not reconciled against payment amount
Holdback calculation	Yes	Figure visible, basis requires confirmation
Email approvals	Partial	Email thread included, but final release approval is unclear
Insurance / WSIB / compliance backup	Not reviewed	Not part of this sample finding set
Contract / subcontract excerpt	No	Contract basis not included in the sample package

4. Evidence Checklist

Review Area	Status	Finding
Invoice matches draw request	PASS	Invoice amount is visible and matches the submitted draw total
SOV supports claimed progress	REVIEW	Claimed progress is higher than the supported/approved amount shown in backup
Change orders approved	HOLD / REVIEW	Approval evidence for included change order is missing or incomplete
Holdback figure visible and consistent	REVIEW	Holdback is visible but should be recalculated against the agreed basis
PM / site approval present	REVIEW	No clear written PM/site confirmation included
Deficiencies/backcharges resolved	REVIEW	Deficiency/backcharge status is referenced but not reconciled
Required backup included	REVIEW	Several support items should be requested before treating package as clean

5. Key Findings

Finding 1 - Progress Claim Requires Support

Status: REVIEW

Issue: The claimed progress amount is not clearly supported by the provided SOV, site confirmation, or approval notes.

Visible variance:

Claimed current progress: **\$86,400**

Supported / approved progress: **\$77,840**

Difference requiring confirmation: **\$8,560**

Recommended next action:

Request PM/site confirmation or an updated approved SOV before treating this amount as supported.

Finding 2 - Change Order Included Without Clear Approval

Status: HOLD / REVIEW

Issue: A change-order amount appears to be included in the draw package, but the reviewed materials do not include clear signed approval or written authorization.

Recommended next action:

Request the signed change order, written approval, or PM confirmation that the amount is authorized for billing.

Finding 3 - Holdback Figure Needs Confirmation

Status: REVIEW

Issue: The holdback amount shown in the package should be confirmed against the invoice basis and project/payment requirements.

Recommended next action:

Confirm the calculation basis and document who verified the holdback figure.

Finding 4 - Approval Chain Incomplete

Status: REVIEW

Issue: The package does not clearly show who approved the draw, progress percentage, change-order inclusion, and payment release.

Recommended next action:

Add written confirmation from the authorized PM/controller/approver before release.

Finding 5 - Deficiency / Backcharge Status Not Reconciled

Status: REVIEW

Issue: The package references or implies unresolved deficiencies/backcharges, but the effect on payment is not clearly documented.

Recommended next action:

Confirm whether deficiencies or backcharges affect this draw and document the decision.

6. Validation Questions

1. What amount is currently being requested for payment?
 2. What amount is clearly supported by the SOV and backup?
 3. Who confirmed the percentage of work completed?
 4. Are any change orders included in the amount requested?
 5. If yes, are those change orders approved in writing?
 6. Is the holdback figure visible and consistent?
 7. Are there any deficiencies, credits, backcharges, or disputed items?
 8. Who has authority to approve this draw?
 9. What documents are still missing?
 10. What should be requested from the subcontractor before release?
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7. Final Review Summary

DecisionOps Review Status: REVIEW

Cleanest next step:

Request the missing approval and backup documents listed in this packet before treating the draw package as fully supported.

Primary missing items:

1. PM/site confirmation of actual progress completed.
2. Signed or written approval for the included change order.
3. Confirmation of holdback calculation and basis.
4. Written approval from the authorized person responsible for release.
5. Confirmation of whether deficiencies, credits, or backcharges affect this draw.

Suggested internal classification:

Not a final payment decision. Documentation review indicates further confirmation is required.