ADDENDUM

TO

CSI EXAMINATION

STUDY GUIDES

for

CDT Certificate

and

CCS Certification

CCCA Certification

CCPR Certification
# Table of Contents

Introduction and Purpose ............................................................... 1  
Changes in SectionFormat 2007 .................................................. 2  
Changes in PageFormat 2007 ..................................................... 3  
Changes in AIA A201 – 2007 ....................................................... 4  
Changes in EJCDC C-700 – 2007 ............................................... 6  
PRM Errata Sheet ..................................................................... 7
Introduction and Purpose

CSI's CDT certificate program and advanced certification programs rely on several documents which contain the material that candidates need to study to be successful in achieving the certificate or attaining certified status. During 2007, four of the primary documents that provide source material for the certificate and certification programs were updated. These are:

- CSI SectionFormat™ 2007
- CSI PageFormat™ 2007
- EJCDC C-700, Standard General Conditions of the Construction Contract – 2007

The Project Resource Manual – CSI Manual of Practice (PRM), which is another very important source for candidates, was published in 2005. It has not yet been updated to reflect the 2007 changes to SectionFormat™, PageFormat™, AIA A201, and EJCDC C-700. Therefore, some of the information in the PRM is not current.

Candidates for the spring 2010 exams are strongly urged to obtain and study the new primary source documents, rather than relying on the PRM or on older versions of the documents. This is the only way to be sure of studying correct and up-to-date information.

To help candidates be aware of the kinds of changes that have occurred in these source documents, the following summary is provided. This is only an overview of some major points and is not a substitute for studying the new documents themselves.
Changes in SectionFormat™ 2007

Many individual changes have been made in SectionFormat™ 2007. They cannot be summarized in any meaningful way. Candidates are encouraged to read the SectionFormat™ 2007 document to see exactly what has changed. The following is only a general indication of the kinds of changes that have been made.

• Some headings have been renamed. For example, "Manufacturer's Field Services" is now "Manufacturer Services."

• Some headings have been moved. For example:
  - "Description" and "Performance/Design Criteria," which were previously covered in Part 1, are now in Part 2.
  - "Materials" and "Accessories" are moved to later positions in Part 2.

• Some headings have been added. For example, "Systems" and "Assemblies" have been added as potential headings in Part 2. Headings related to sustainability, such as "Sustainable Design Submittals," have also been added.

• Some headings have been eliminated. For example, there is no more "Performance Verification" heading.

• Some headings have been reworded to match the language of MasterFormat™ 2004. For example, "Related Sections" is now "Related Requirements."

• The guidance explaining what belongs under each major heading has been rewritten and differs somewhat from the previous version.

• Schedules, tables, illustrations, and forms are specifically permitted in the specifications. In general it is preferred that they be placed at the end of Part 3, but they can be located elsewhere in the section if the format and size are compatible with adjacent text.

• The structure of headings in SectionFormat™ is now considered flexible. Headings can be omitted or moved up or down in the hierarchy to suit the requirements of individual projects. New, project-specific headings can be added if needed. This makes SectionFormat™ 2007 more useable as a specifications organizing system for projects of all sizes and types.
Changes in PageFormat™ 2007

• In headers and footers, it is no longer recommended that any information be centered. All information is placed flush to either the left or the right margin.

• PageFormat™ 2007 has been made less technology-specific and more generic in order to encompass evolving methodologies such as web-based publication.

• There are many other individual changes. Candidates are encouraged to review the PageFormat™ 2007 document to understand what has changed.
Changes in AIA Document A201 – 2007
General Conditions of the Contract for Construction

The AIA contract documents are rewritten every ten years, and one of those major rewrites occurred in 2007. There are many individual changes in AIA Document A201 - 2007, and it is not possible to summarize them all. The following are only some main points that are relevant to project delivery and construction contract administration. A comparison of the old and new versions of A201 is available at no charge at the AIA website:

http://www.aiacontractdocuments.org/resource_tools.cfm#comparatives

Candidates relying on the AIA contract documents as their information source for the CDT program are strongly urged to study that document to understand the changes that have been made.

• Arbitration: Arbitration is no longer mandatory. The parties can choose arbitration, litigation, or another procedure. If they choose nothing, the default procedure for resolving disputes is litigation.

• Insurance: The contractor is required to name the owner, architect, and architect's consultants as additional insureds on the contractor's general liability policy. They are covered only when contractor is wholly or partially at fault in giving rise to the claim. Also, subcontractors are required to name the contractor as an additional insured.

• Initial decision maker: The architect is no longer automatically the initial decision maker on claims between owner and contractor. Instead, the owner and contractor may designate a third party in the agreement; if they don't, this role defaults to the architect.

• Statute of limitations: State statutes of limitations control, but there is a 10-year maximum time limit after substantial completion for filing of claims under the agreement.

• Subcontractor and supplier payments: The contractor must pay subcontractors and suppliers within 7 days after receiving payment from owner. The contractor must provide proof of payment within 7 days of owner's request; otherwise owner may contact subcontractors and suppliers directly. The owner may issue joint checks if subcontractors or suppliers have not been paid.

• Superintendent: The owner has right of approval over selection of superintendent.

• Submittal schedule: If the submittal schedule is not submitted promptly after award of contract, the contractor forfeits the right to additional money or time based on time required for review of submittals.

• Consolidated arbitration: Arbitration involving the architect can be consolidated with other parallel arbitration under some circumstances.

• Obtaining financial data from owner: The contractor's right to demand proof of financial standing from the owner during construction is limited to cases where the contractor hasn't been paid, the contractor identifies reasonable concern, or the scope of the work substantially changes.

• Hazardous materials: The contractor indemnifies the owner for hazardous materials brought to the site by the contractor and handled negligently.
• Architect's site visits: The architect no longer has a duty to guard the owner against defects and deficiencies in the work.

• Concealed conditions: If the contractor uncovers human remains, burial markers, archaeological sites, or undisclosed wetlands, the contractor stops work and may request adjustments in contract sum or time.

• Notice of defective work: The owner has the right to carry out the work if the contractor does not remedy defects within 10 days after a single notice.

• Project representative: The responsibilities of the (optional) full-time project representative are no longer spelled out in AIA Document B352; the document has been discontinued. It has been replaced by AIA Document B207.

• Form numbering system: Some AIA form numbers have been changed. Notably, the owner-architect agreement, AIA Document B141, is now AIA Document B201.
The EJCDC contract documents were rewritten in 2007, five years after their last revision in 2002. The changes in the EJCDC general conditions were not as extensive as those made in the AIA general conditions, and do not parallel the more significant departures made by the AIA. The following are some main points that are relevant to project delivery and construction contract administration. A summary of the most important changes in the 2007 EJCDC contract documents is available at no charge at the ACEC website:

www.acec.org, click "Bookstore – Contract Documents," then click "EJCDC"

Candidates relying on the EJCDC contract documents as their information source for the CDT program are strongly urged to consult the full 2007 edition of EJCDC C-700.

- Safety: The contractor must make known, and the owner and A/E must comply with, the contractor's safety requirements. Contractor must also comply with any owner safety programs.

- Site conditions: The owner must give the contractor all known reports and drawings of site conditions, not just those relied on by the design professional. Contractors must take into consideration not only information furnished by the owner, but also their own knowledge of site conditions and common knowledge about local conditions.

- Insurance: The owner's responsibility to make all insurance decisions has been made explicit.

- Reporting discrepancies in design: The contractor is responsible to report only those errors or conflicts in the specifications and drawings of which he had actual knowledge.
PRM Errata Sheet

The following list is not comprehensive, but advises candidates of some portions of the PRM which are known to be outdated as a result of recent changes in SectionFormat™, PageFormat™, AIA A201, and EJCDC C-700.

Candidates should not assume that this list identifies all portions of the PRM that draw upon older versions of the source documents. It is provided only to highlight the fact that the new source documents affect material throughout the PRM. Candidates are strongly urged to study the new source documents and not rely solely on the PRM.

Portions of the PRM known to be outdated due to the new AIA A201 include:

Regarding A/E guarding the Owner against deficiencies in the work: 4.10.2.5, 5.4, 7.2.2, 7.6, 7.6.3.1, 7.7.1.

Regarding arbitration: 5.4.1.5, 7.10.5.1, 7.10.5.2, 7.10.5.4.

Regarding role of the A/E in claims and dispute resolution: 5.4.1.5, 7.2.2, 7.10.2.5, 7.10.2.6, 7.10.4, Fig. 7.10-A, 7.10.5, 7.10.5.1, 7.10.5.2, 7.10.5.4.

Regarding project representative: 7.6.3.3, Fig. 7.6-A

In general: Fig. 5.6-D, Fig. 5.20.D, Fig. 7.6-H, 7.11

Portions of the PRM known to be outdated due to the new EJCDC C-700 include:

Regarding reporting discrepancies in design: 7.6.4

In general: Fig. 5.20-D, Fig. 7.3-A, Fig. 7.12-C

Portions of the PRM known to be outdated due to the new SectionFormat™ include:

In general: 5.9.8.4, Fig. 5.5-C, Fig. 5.6-B, Fig. 5.9-E, Fig 5-13.A, Fig 5.14-C, Fig. 5.14-E, Fig 5.15-C, Fig 5.15-D, 5.15.10.

Portions of the PRM known to be outdated due to the new PageFormat™ include:

In general: The figures listed above under SectionFormat, and Fig. 5.14-D.