



## Substantial Completion Certificate Training Guide

Date Created: 10/11/2022

Date Updated: 03/24/2022

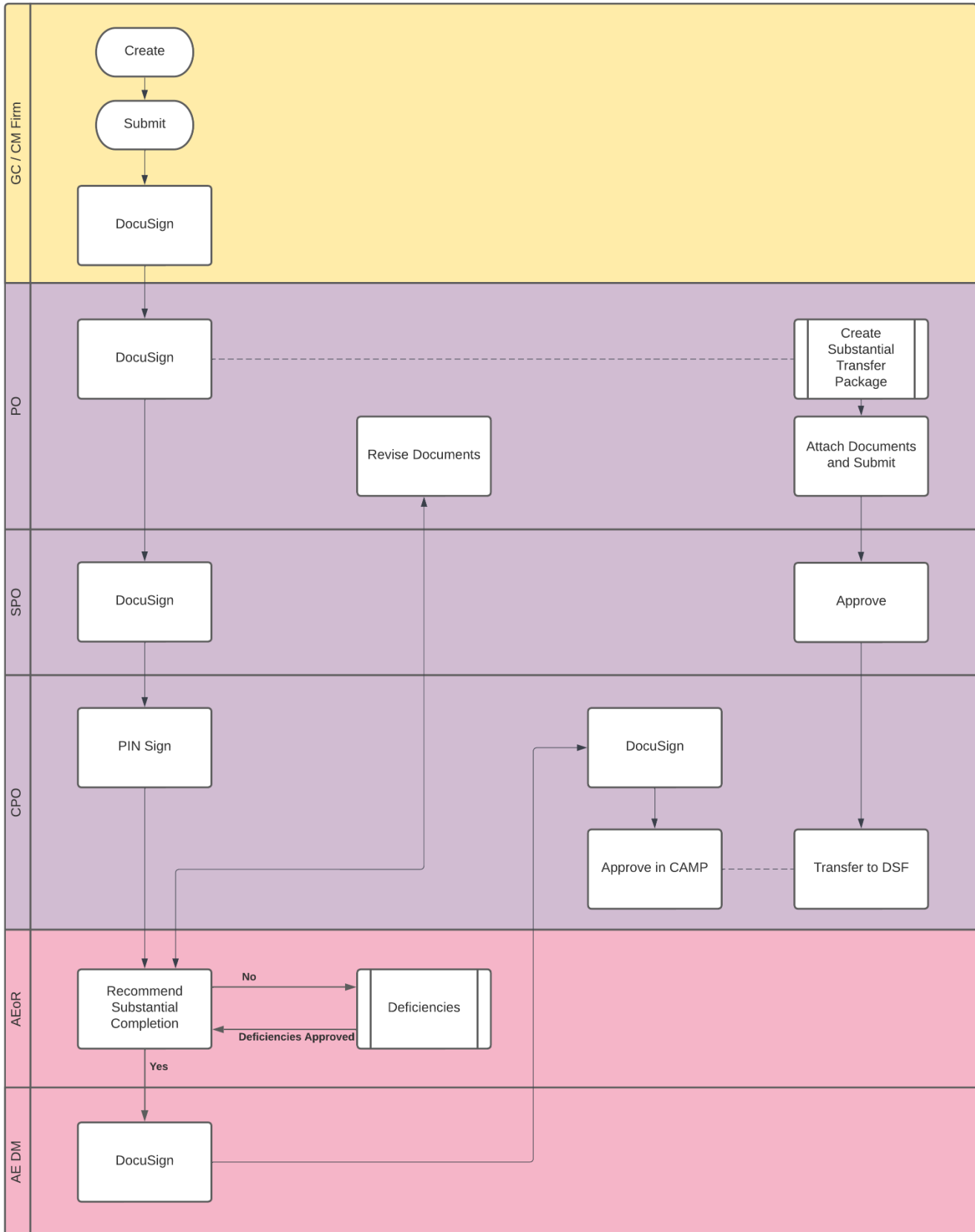
## Contents

About.....	3
Workflow Diagram .....	3
Process Overview .....	4
Step-by- Instructions.....	5
GC/CM Firm Creates Substantial Completion.....	5
Edit Substantial Completion Request .....	6
DocuSign Approvals – GC, PO, SPO.....	6
CPO PIN Signs.....	7
AEoR Recommends Substantial Completion .....	8
AEoR Specifies Deficiencies Required .....	10
Option 1: AEoR Creates Deficiencies List .....	10
Option 2: AEoR Returns Substantial Completion to PO.....	11
PO Resubmits to AEoR – PO.....	12
DocuSign Approvals – AE DM, CPO.....	13
CPO Accepts the Substantial Completion .....	13

# About

The Substantial Completion application is used to request and approve a certificate of substantial completion for a subproject.

## Workflow Diagram



## Process Overview

The GC with the active project will initiate the Substantial Completion request, completing the form with all necessary dates and information. The GC submits the request requiring the DocuSign of the GC, PO, and SPO. At this time, the PO will also create and submit the Substantial Transfer Package. This is where the documents required for substantial completion will be uploaded.

Please see the *Substantial Package – CAMP Training Guide* for more information on how to create and submit the substantial package. The SPO and CPO will navigate to the substantial package to review the documents required for substantial completion.

The CPO needs to PIN sign the request and then the AEO will need to determine if the Substantial Completion request is valid. Revisions to the substantial completion files should be addressed through email. If deficiencies are required, the AE can create the Deficiency List. The substantial completion request cannot be signed or completed until all deficiencies have been resolved.

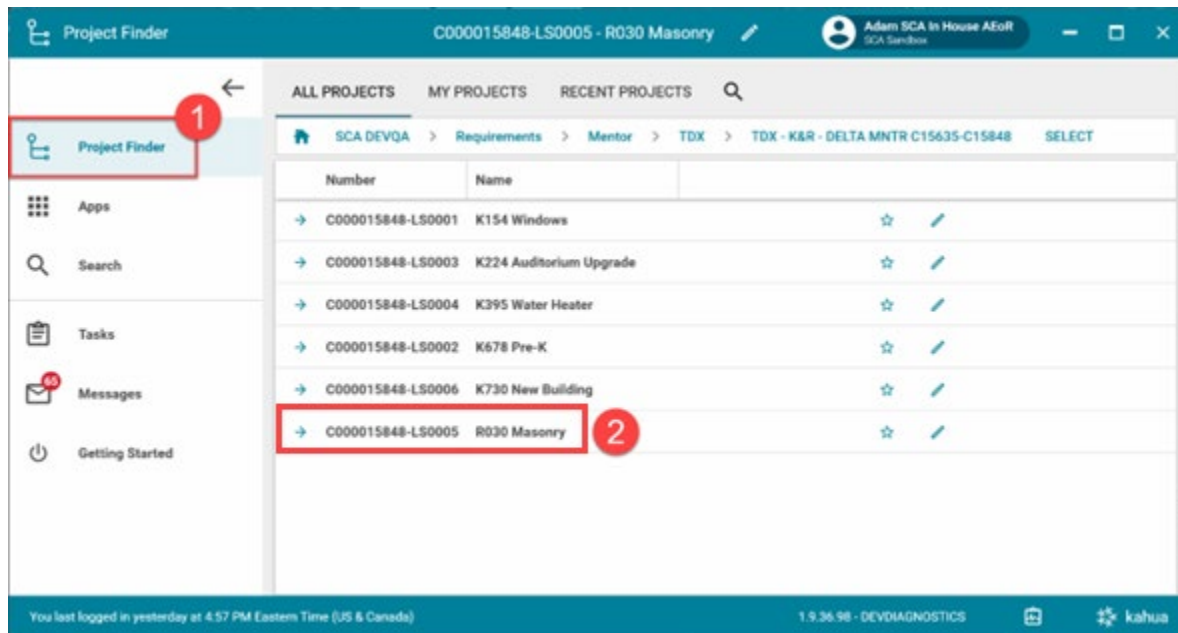
If deficiencies are not required or the deficiency list has been approved, the AE will PIN sign and send to the DM for DocuSign. The CPO will be the final individual to DocuSign and receives a task inside of CAMP to identify the Substantial Completion date.

Upon identification of the date and approval, a Substantial Completion memo and certificate will be distributed to recipients.

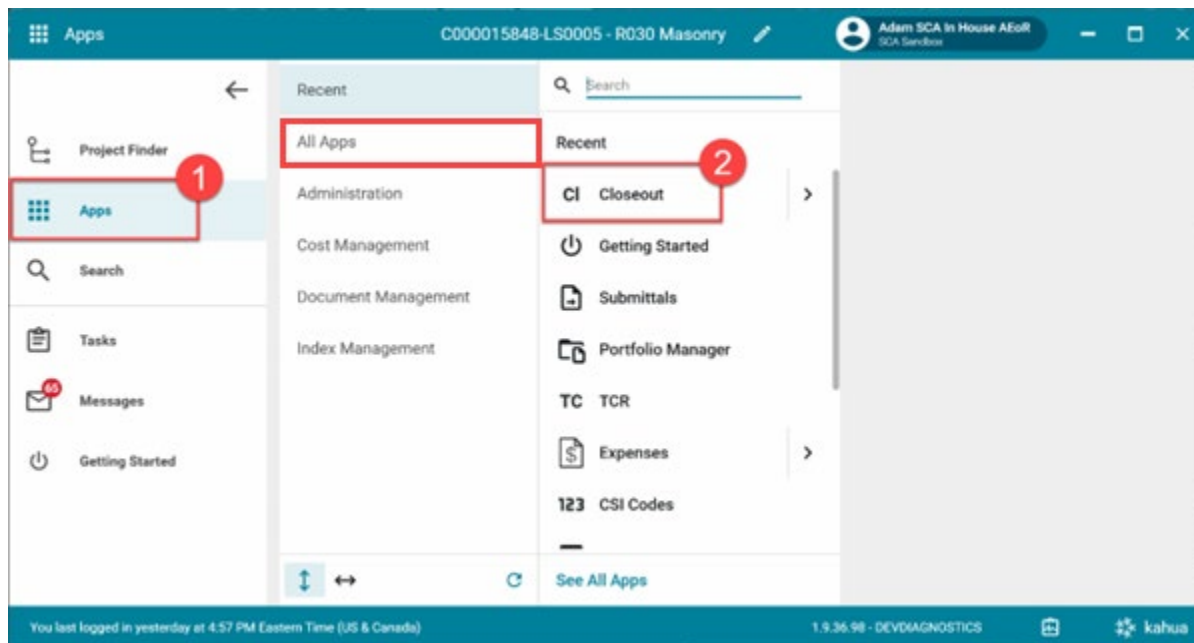
## Step-by- Instructions

### GC/CM Firm Creates Substantial Completion

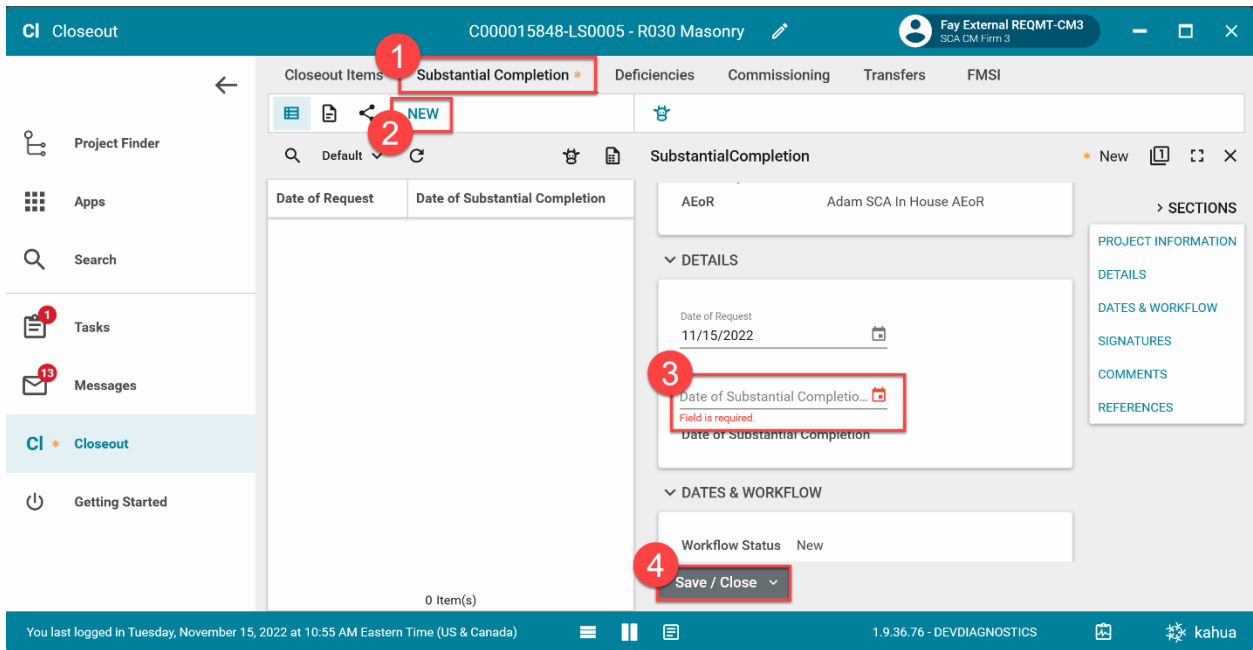
1. Go to Project Finder > Select desired project



2. Go to **Apps** > **All Apps**> Select the **Closeout** App

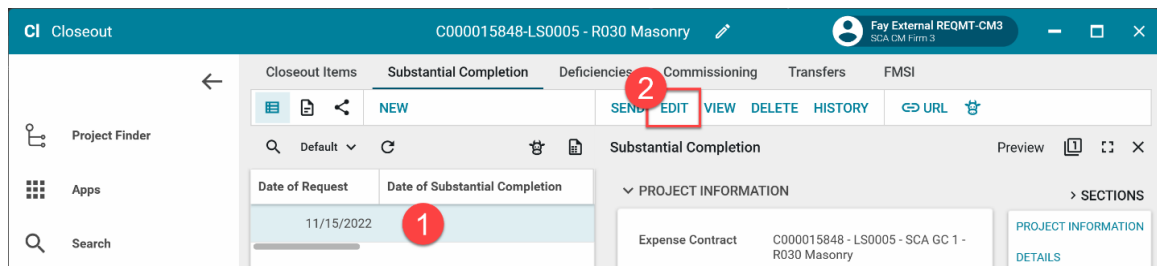


3. Select the **Substantial Completion** tab
4. Click **New**
5. Enter **Date of Substantial Completion** (certified by GC)
6. Click **Save/Close** to save a **Draft**. *You have not submitted the Certificate at this point.*

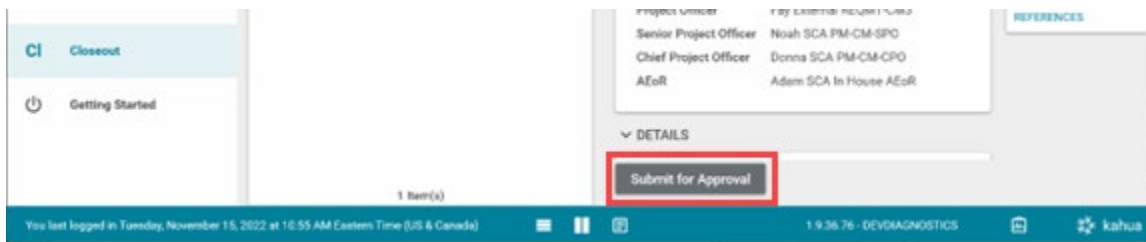


## Edit Substantial Completion Request

You can make changes before submitting by clicking **Edit**, then **Save/Close** when finished.



## 7. Click **Submit for Approval**

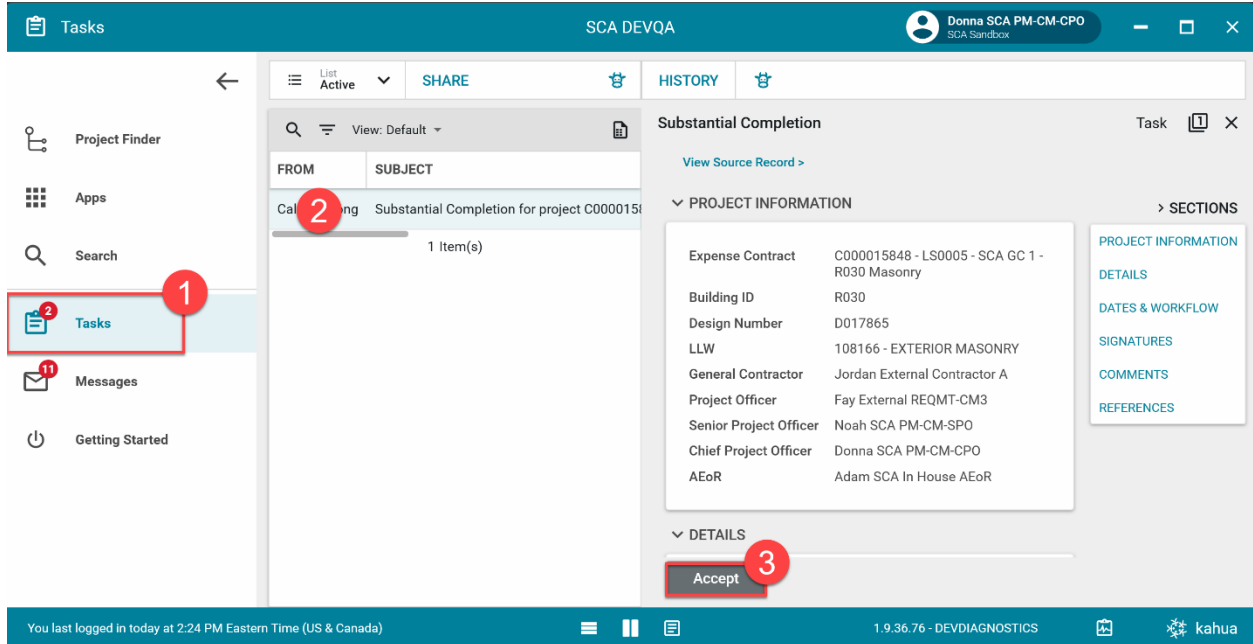


## DocuSign Approvals – GC, PO, SPO

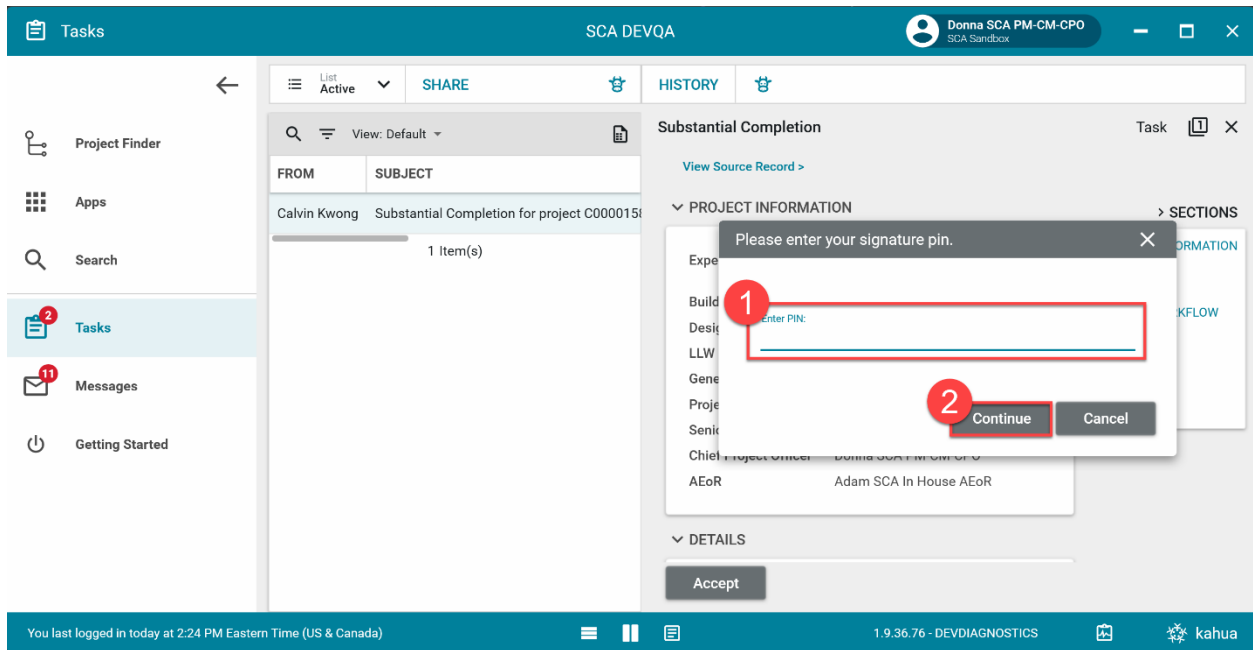
1. Go to email account (external) > Select email titled **Certificate of Substantial Completion**
2. Click Review Document in email
3. You are redirected to DocuSign. Click [here](#) to learn more about DocuSign.

## CPO PIN Signs

1. Go to **Tasks** > Select the Substantial Completion Task > Select **Accept**



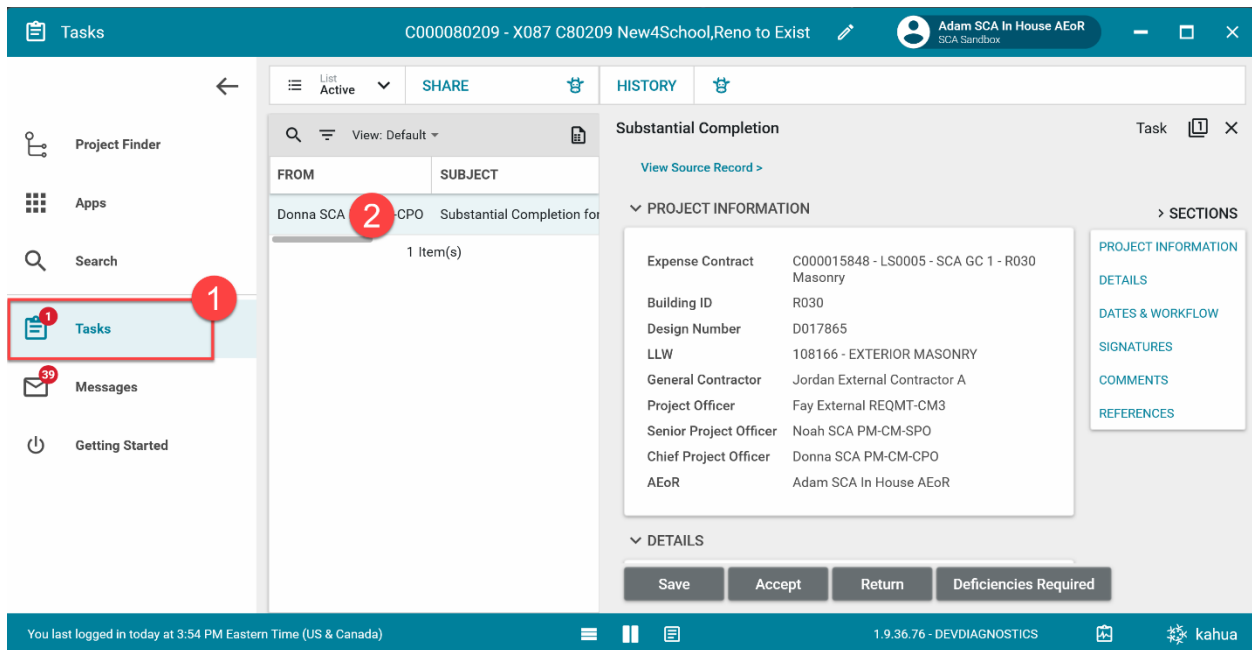
2. Enter your PIN code and click **Continue**



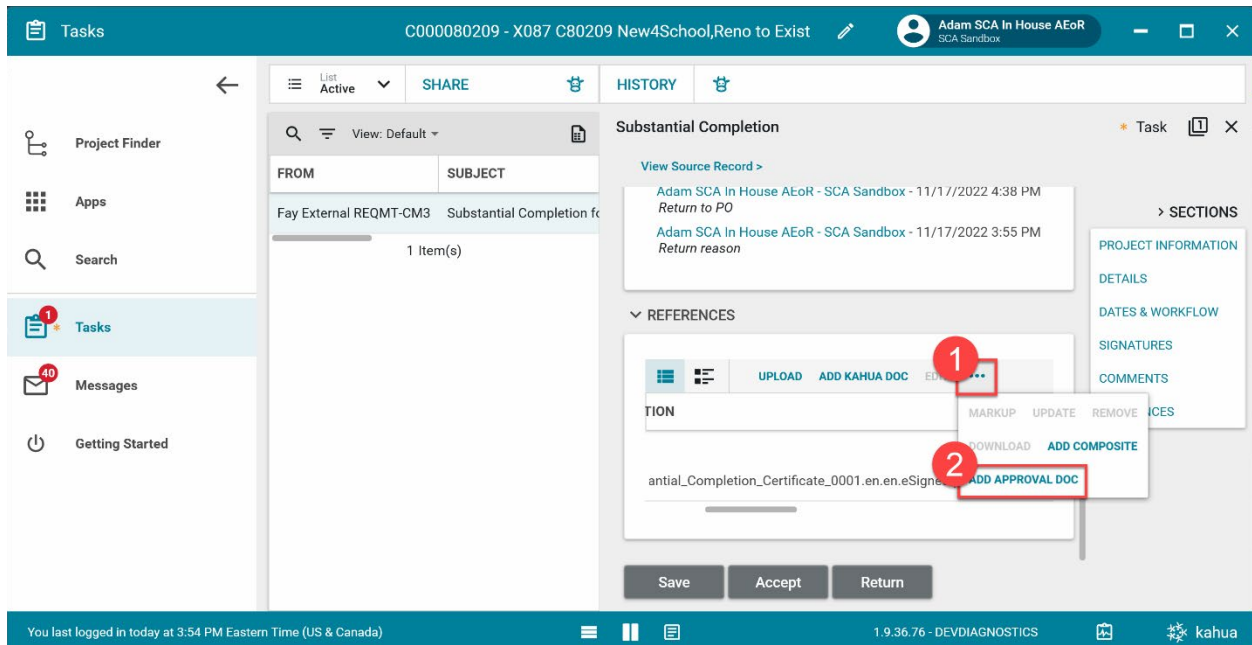
## AEoR Recommends Substantial Completion

The request has been approved by the CPO. If deficiencies are required, the deficiency list must be created and approved.

1. Go to Tasks > Select the Substantial Completion Task

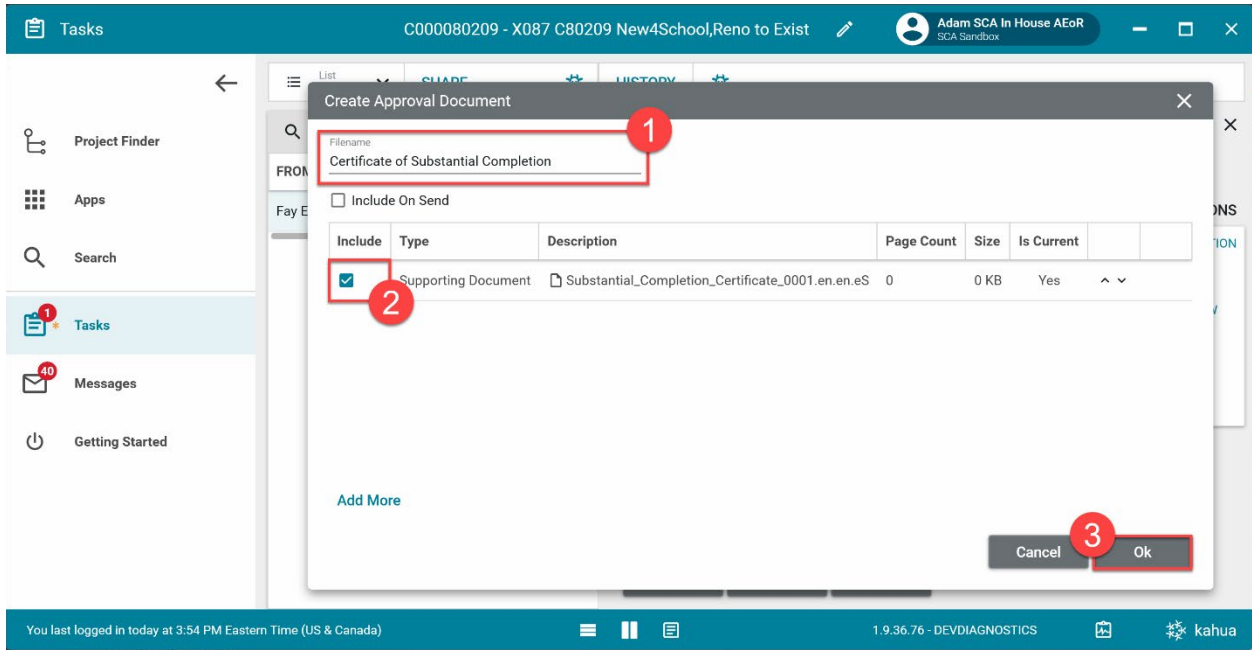


2. In the References section, select ... > Select Add Approval Doc

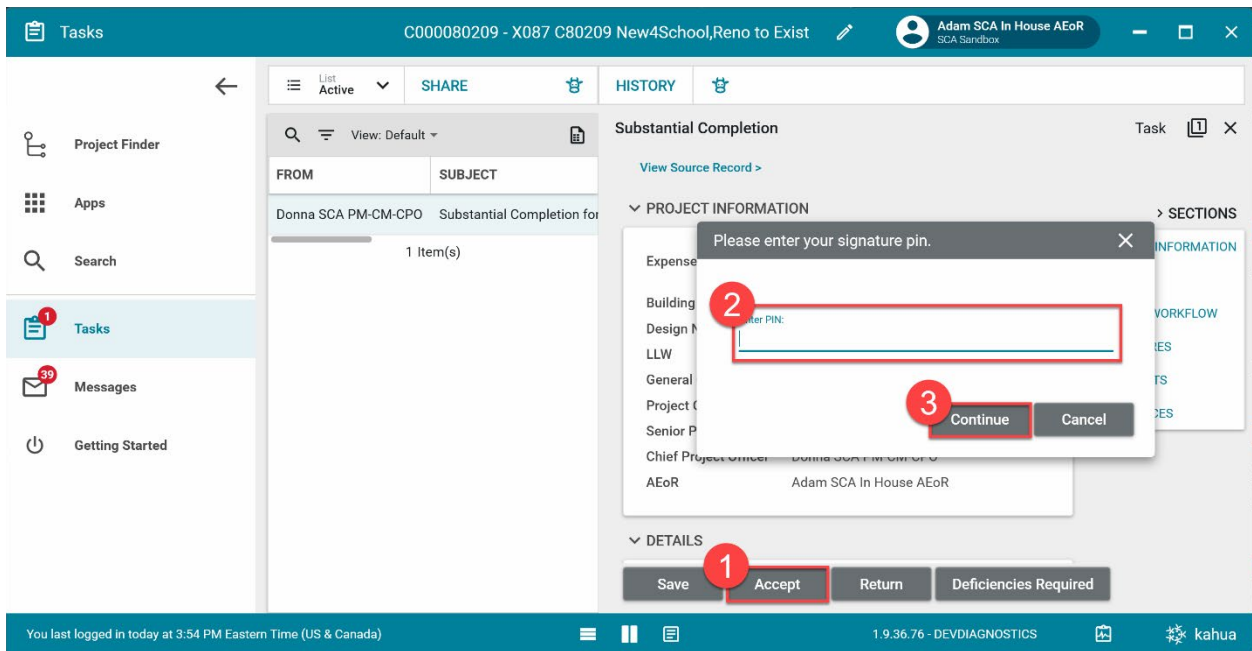


3. Enter a Filename > Select the Include checkbox for the substantial completion certificate that was signed by the GC, PO, and SPO (the description will end in .eSigned.pdf) > Click Ok





4. Select Accept > Enter your PIN code > Click Continue



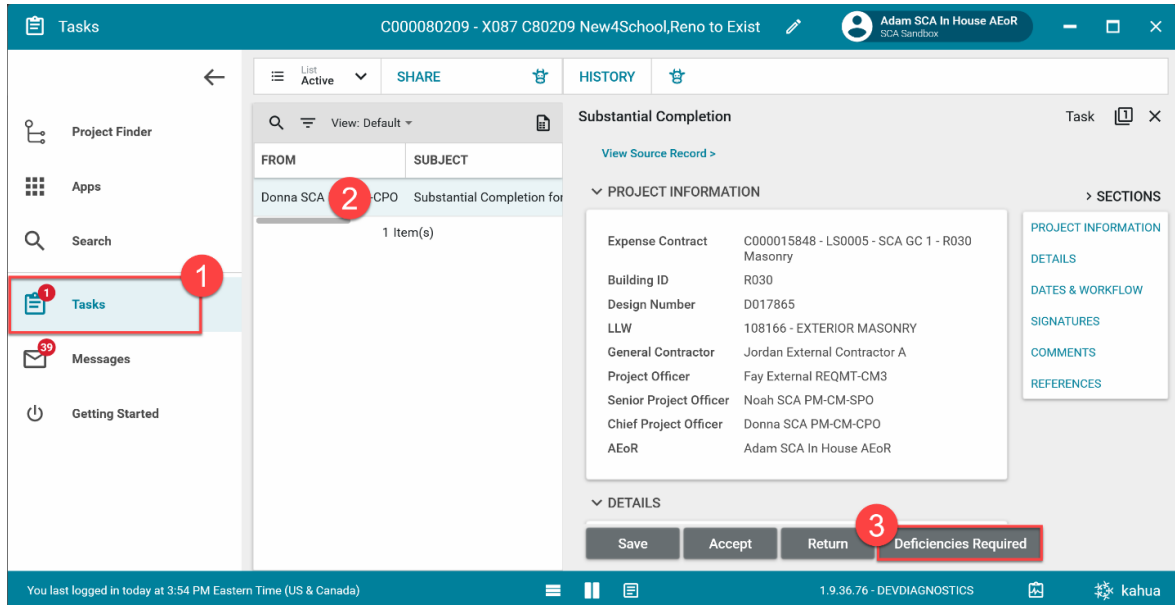
## AEoR Specifies Deficiencies Required

A deficiencies list must be created and approved to continue with the substantial completion.

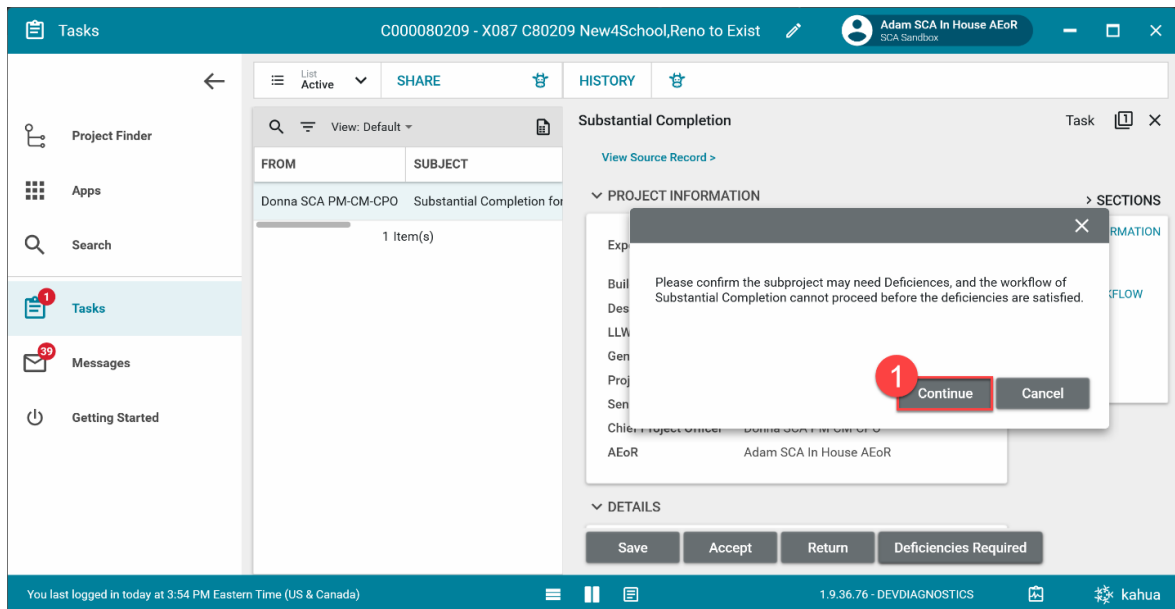
1. Go to **Tasks** > Select the **Substantial Completion Task**

Option 1: AEoR Creates Deficiencies List

1. Click Deficiencies Required



2. Click **Continue**



The Substantial Completion will now go to the AE DM and the CPO for [DocuSign Approvals](#).

## Option 2: AEoR Returns Substantial Completion to PO

Instead of creating the deficiencies list at this time, the AEoR could choose to return the Substantial Completion back to the PO for more information.

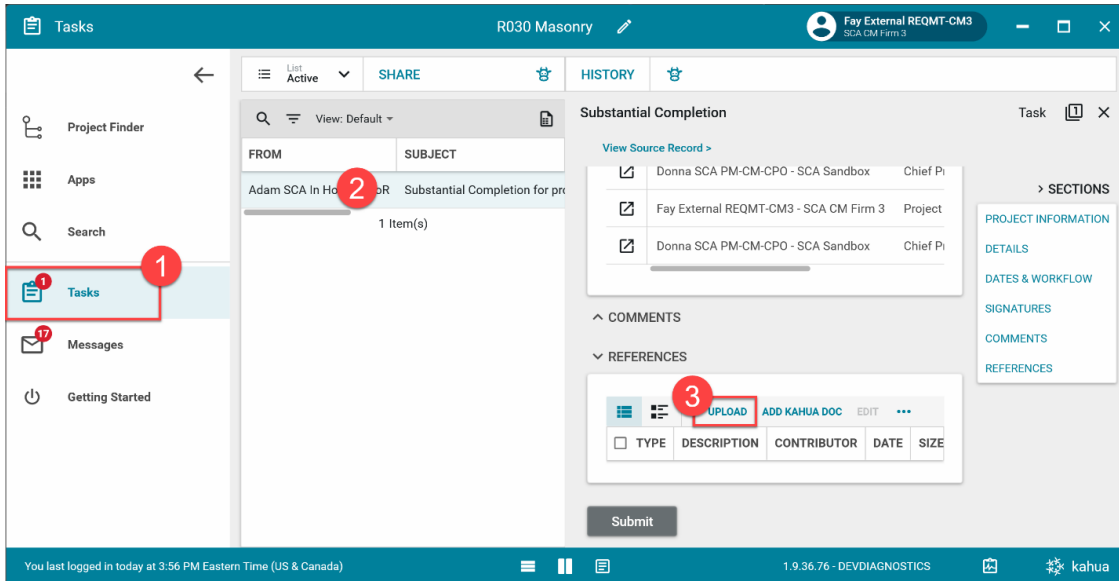
1. Go to Tasks > Select the Substantial Completion Task > Click **Return**

The screenshot shows the 'Substantial Completion' task interface. The sidebar on the left has 'Tasks' highlighted with a red box and a '1' in a red circle. The main content area shows a table with one item: 'Donna SCA PM-CM-CPO Substantial Completion for' with a '2' in a red circle. Below the table, there are buttons for 'Save', 'Accept', 'Return', and 'Deficiencies Required'. The 'Return' button is highlighted with a red box and a '3' in a red circle. The right side of the interface displays project information, including 'Expense Contract C000015848 - LS0005 - SCA GC 1 - R030 Masonry', 'Building ID R030', 'Design Number D017865', 'LLW 108166 - EXTERIOR MASONRY', 'General Contractor Jordan External Contractor A', 'Project Officer Fay External REQMT-CM3', 'Senior Project Officer Noah SCA PM-CM-SPO', 'Chief Project Officer Donna SCA PM-CM-CPO', and 'AEoR Adam SCA In House AEoR'. The bottom status bar shows 'You last logged in today at 3:54 PM Eastern Time (US & Canada)' and '1.9.36.76 - DEVDIAGNOSTICS'.

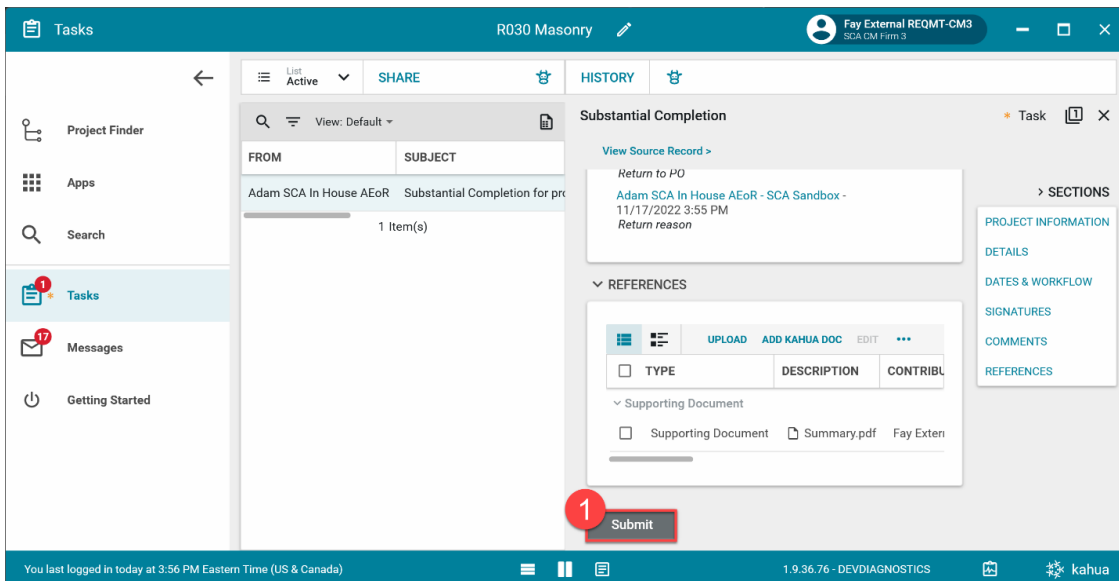
2. Enter the **return reason** and click **Continue**

The screenshot shows the 'Substantial Completion' task interface with a modal dialog box open. The dialog box is titled 'Please provide a reason.' and has a text input field (1) and 'Continue' (2) and 'Cancel' buttons. The background interface is dimmed. The 'Return' button in the background is highlighted with a red box and a '3' in a red circle. The bottom status bar shows 'You last logged in today at 3:54 PM Eastern Time (US & Canada)' and '1.9.36.76 - DEVDIAGNOSTICS'.

1. Go to Tasks > Select the Substantial Completion Task > In the References section, select **Upload** to add a file. If you need to **delete** a file, select the file in the References list and click **Remove**.



2. Click **Submit**



## DocuSign Approvals – AE DM, CPO

1. Go to email account (external) > Select email titled **Certificate of Substantial Completion**
2. Click Review Document in email
3. You are redirected to DocuSign. Click [here](#) to learn more about DocuSign.

## CPO Accepts the Substantial Completion

1. Go to **Tasks**
2. Select the **Substantial Completion** Task
3. **Details** section: Enter the **Date of Substantial Completion**
4. Click **Submit**

The screenshot displays the SCA DEVQA application interface. The top navigation bar includes 'Tasks', 'SCA DEVQA', and a user profile for 'Donna SCA PM-CM-CPO SCA Sandbox'. The left sidebar contains navigation options: Project Finder, Apps, Search, Tasks (highlighted with a red box and callout 1), Messages, and Getting Started. The main content area shows a list of tasks with columns 'FROM' and 'SUBJECT'. The first task is 'Adam' with subject 'Substantial Completion for project C000015', highlighted with a red box and callout 2. Below it is a task from 'Noah SCA...' with subject 'Substantial Package 0002'. The details for the selected task are shown on the right, including 'Date of Request' (11/15/2022) and 'Date of Substantial Completion certified by GC' (11/17/2022). The 'Date of Substantial Completion' field is highlighted with a red box and callout 3, and contains the text 'Field is required.'. Below this, the 'Workflow Status' is 'Pending CPO Review' and 'Assigned To' is 'Donna SCA PM-CM-CPO - SCA Sandbox'. At the bottom of the details section, the 'Submit' button is highlighted with a red box and callout 4. The bottom status bar shows the login time 'You last logged in today at 3:31 PM Eastern Time (US & Canada)', system version '1.9.36.76 - DEVDIAGNOSTICS', and the 'kahua' logo.