Substantial Completion Certificate Training Guide

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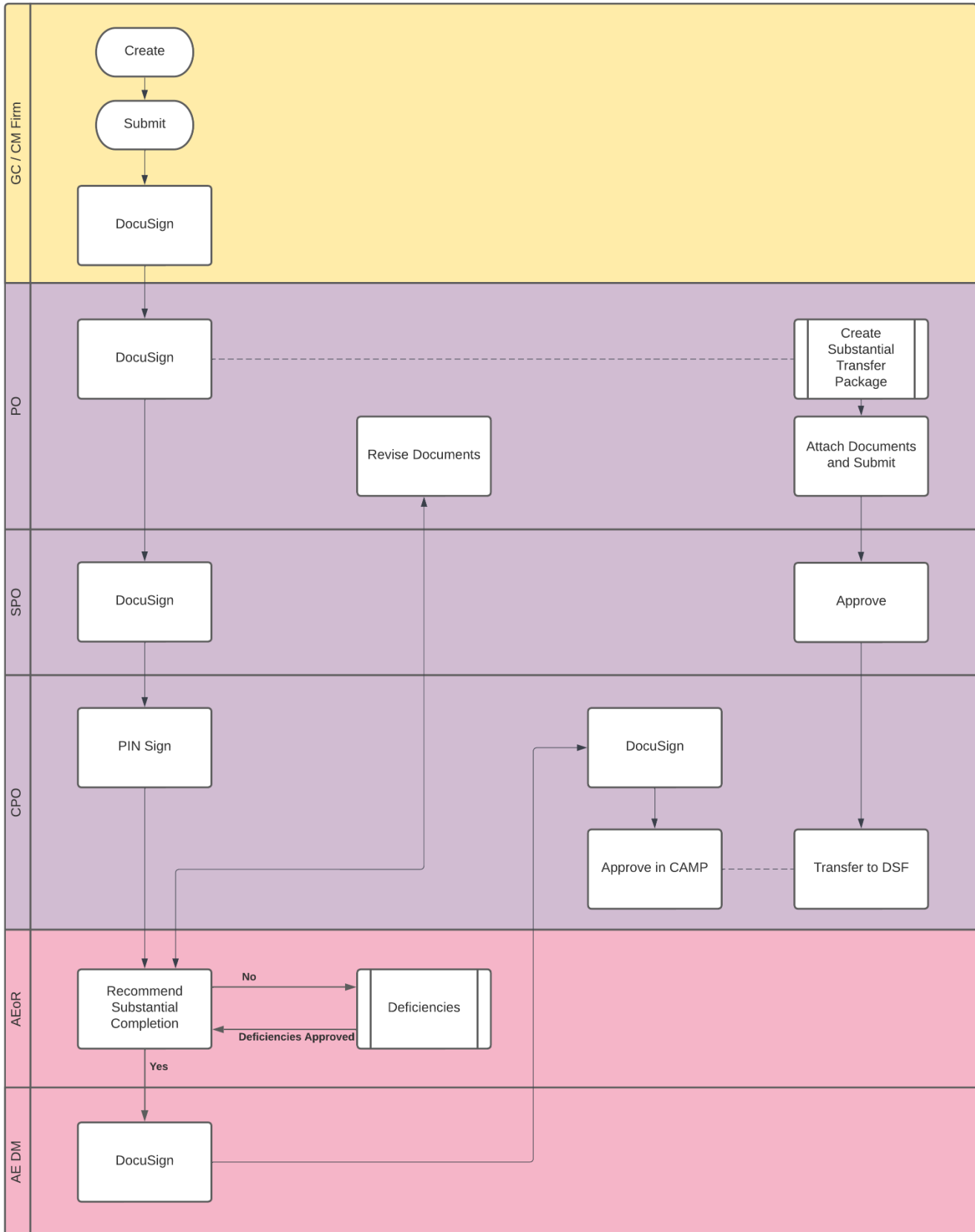
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About

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 AEoR 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.
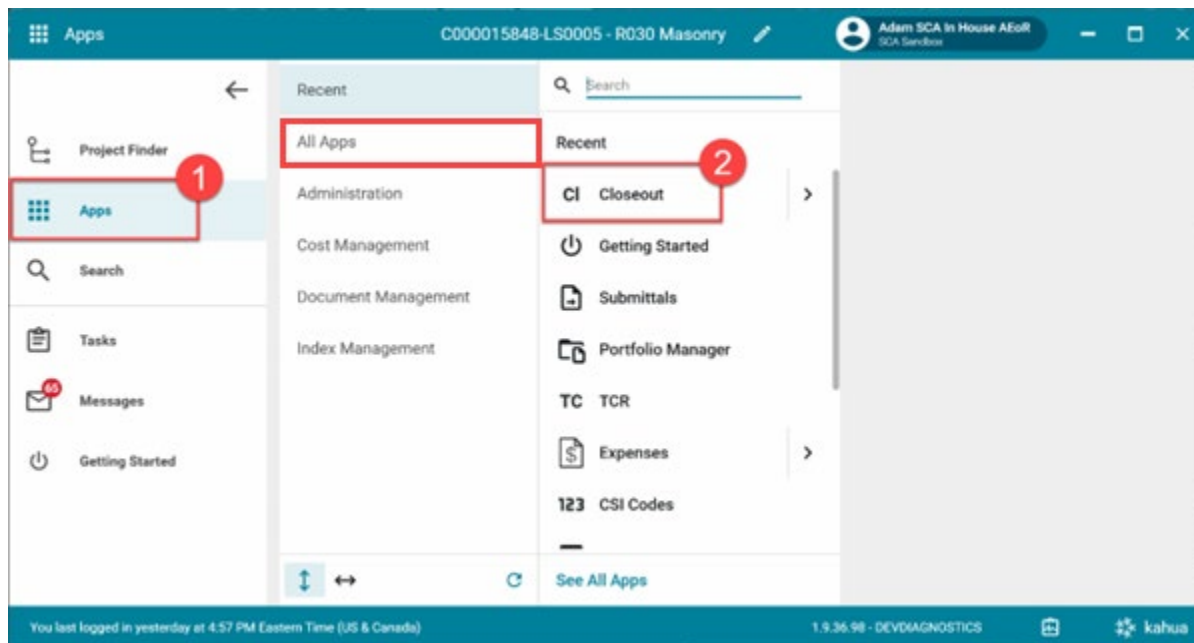
Step-by- Instructions

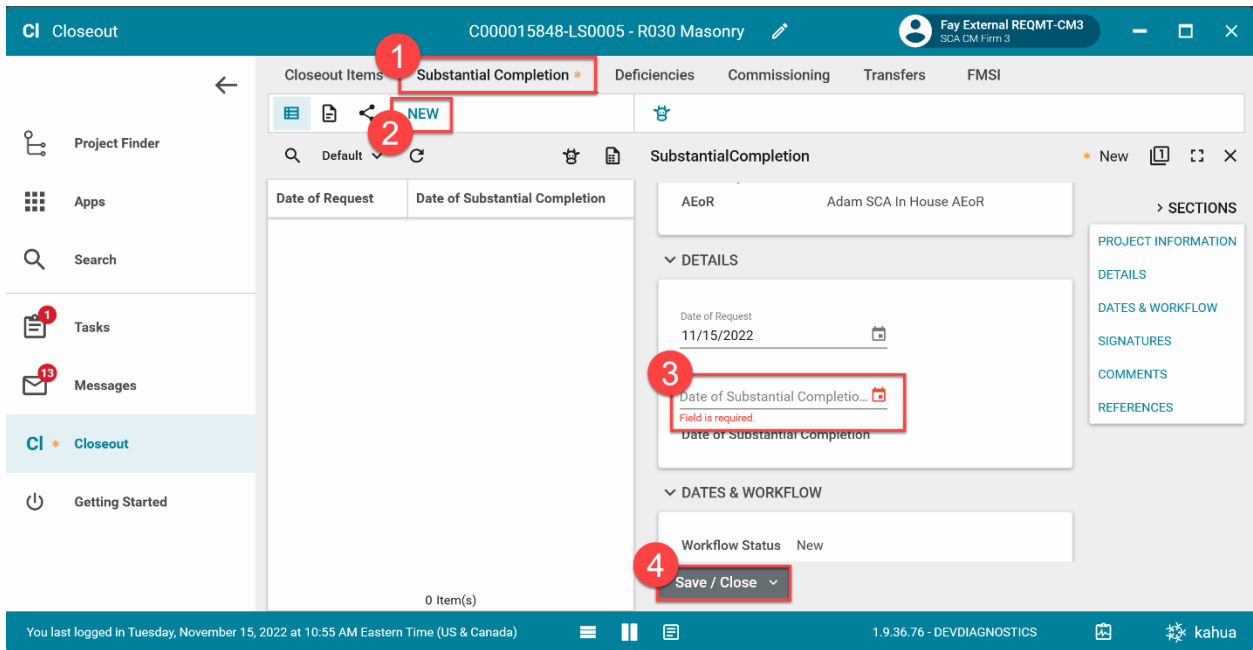## GC/CM Firm Creates Substantial Completion

1. Go to Project Finder > Select desired project
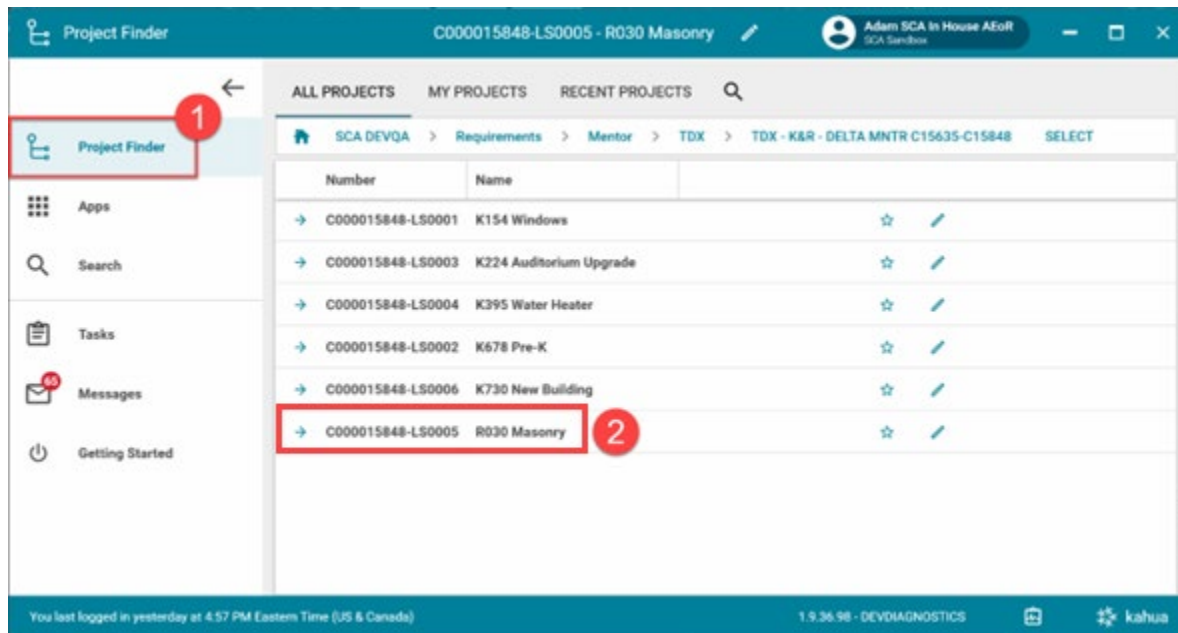
2. Go to **Apps** > **All Apps**> Select the **Closeout** App
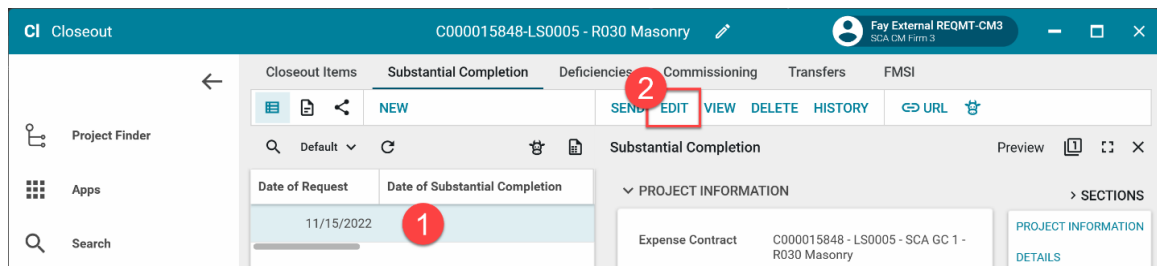

3. Select the **Substantial Completion** tab
4. Click **New**
5. Enter **Date of Substantial Completion** (certified by GC)
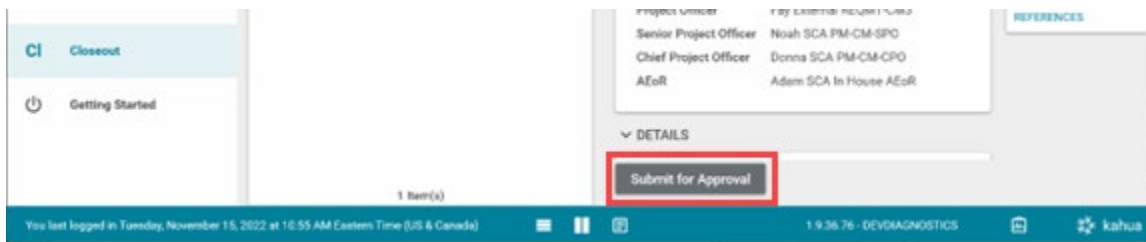6. Click **Save/Close** to save a **Draft**. *You have not submitted the Certificate at this point*.

Edit Substantial Completion Request

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

7. Click **Submit for Approval**
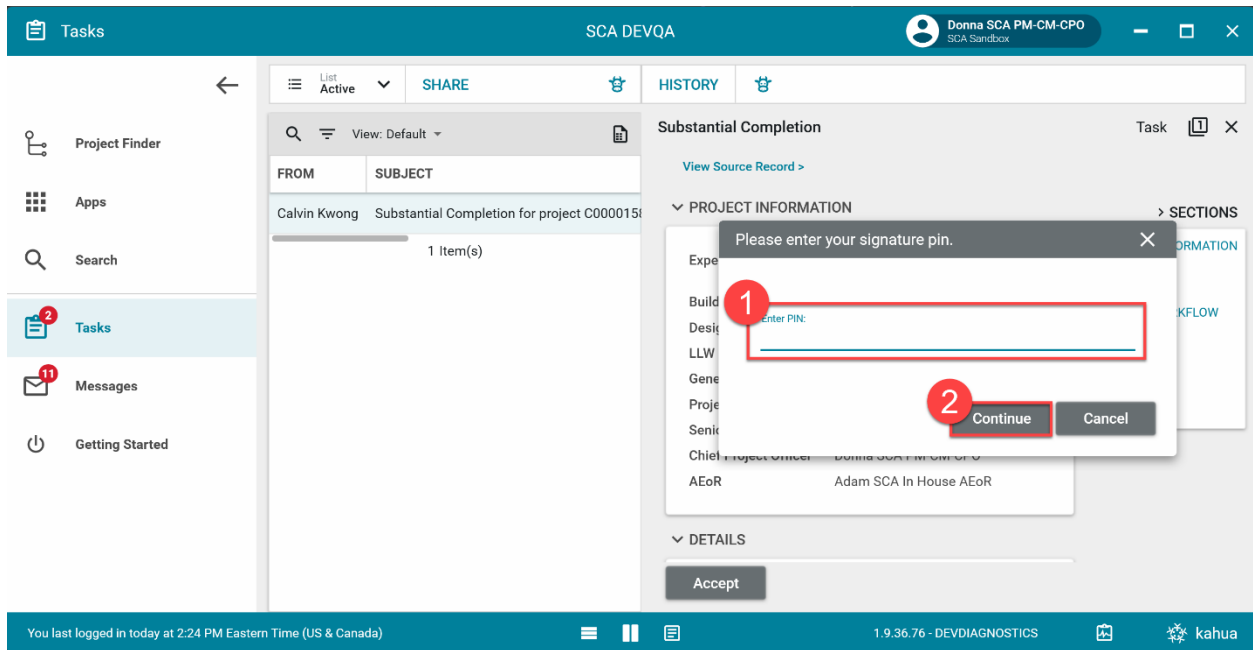

DocuSign Approvals – GC, PO, SPO

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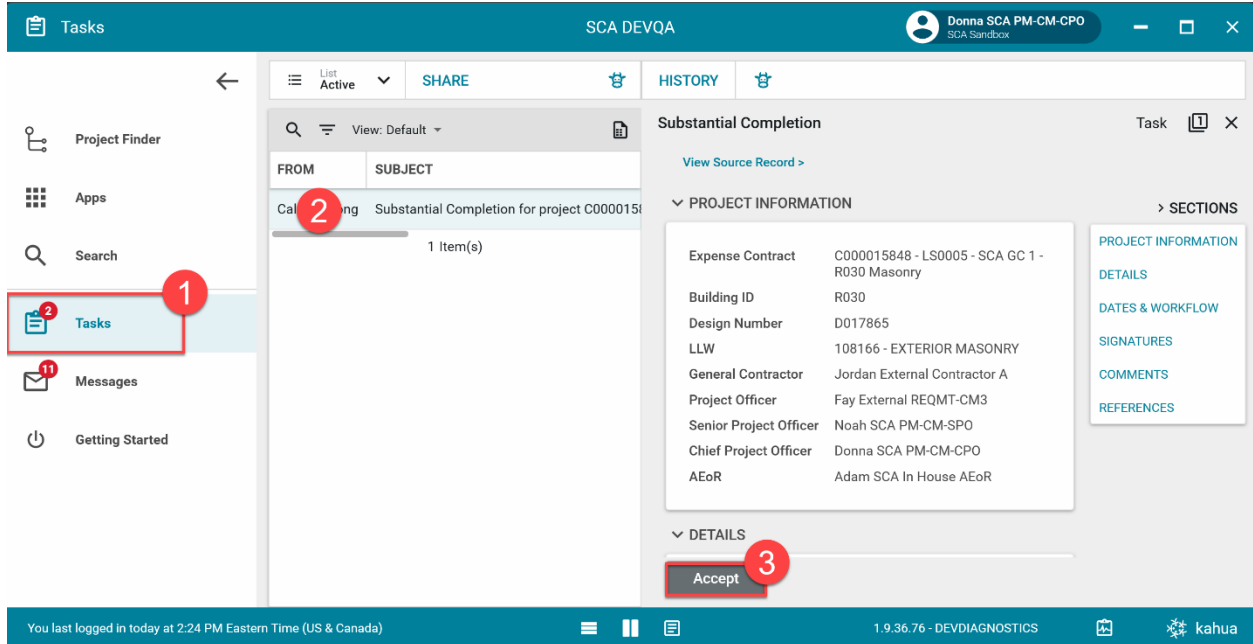
2. Enter your PIN code and click **Continue**

AEoR Recommends Substantial Completion

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

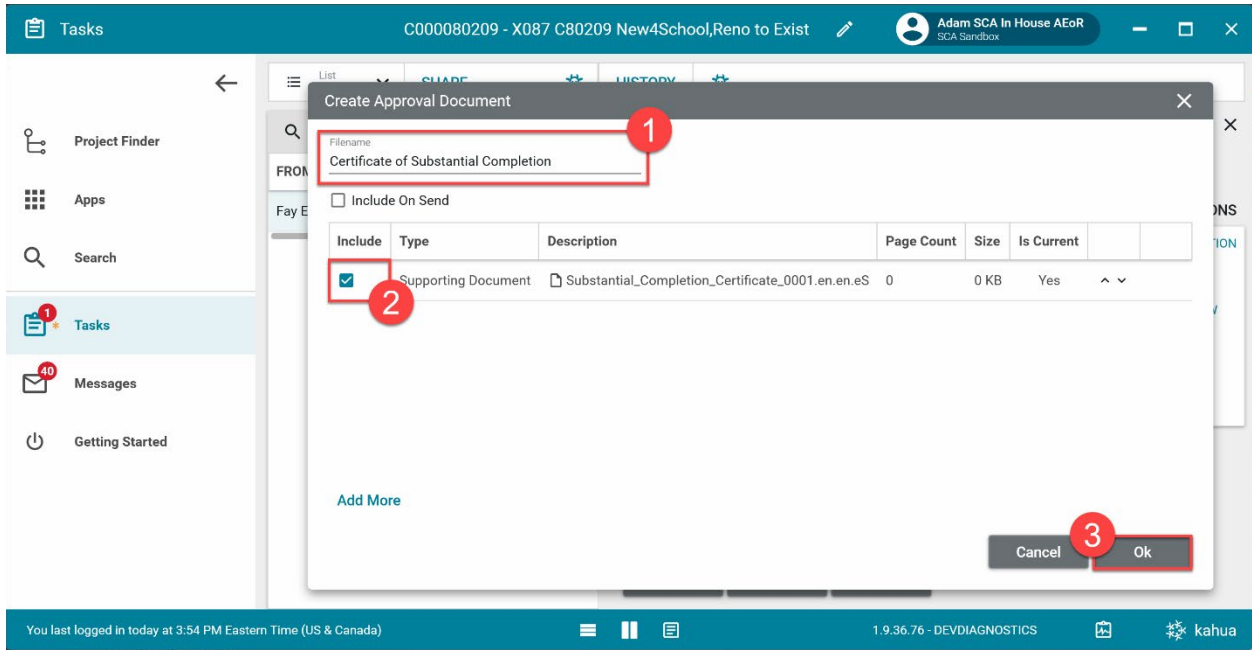1. Go to Tasks > Select the Substantial Completion Task
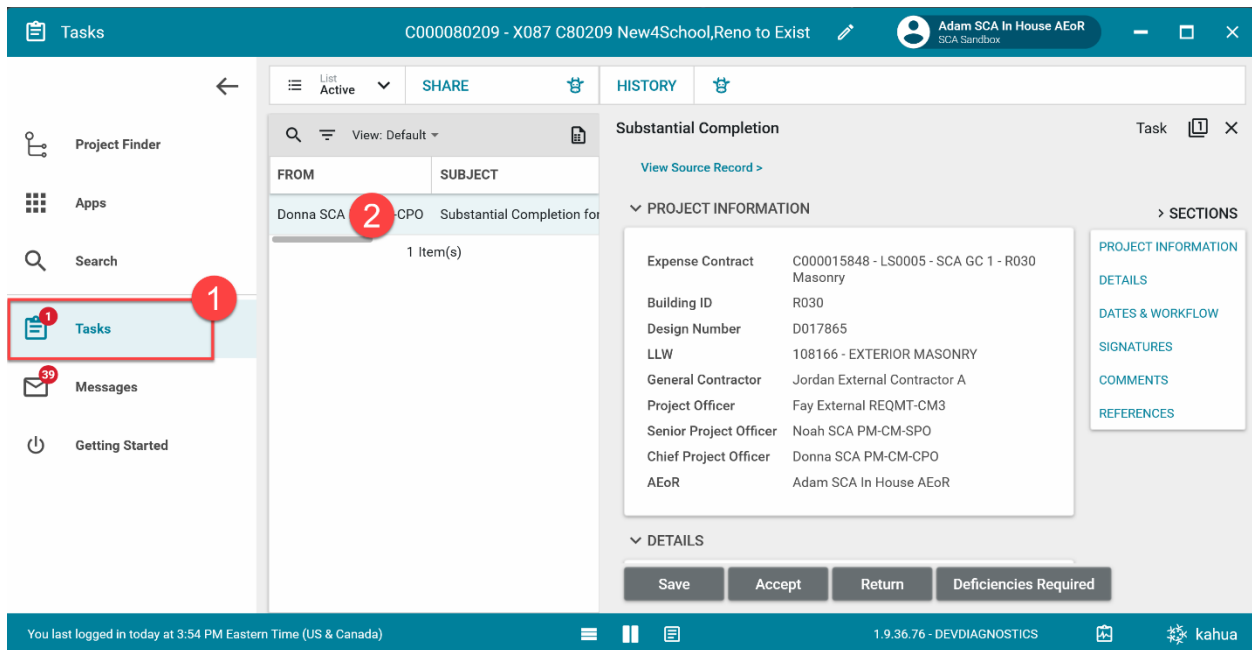
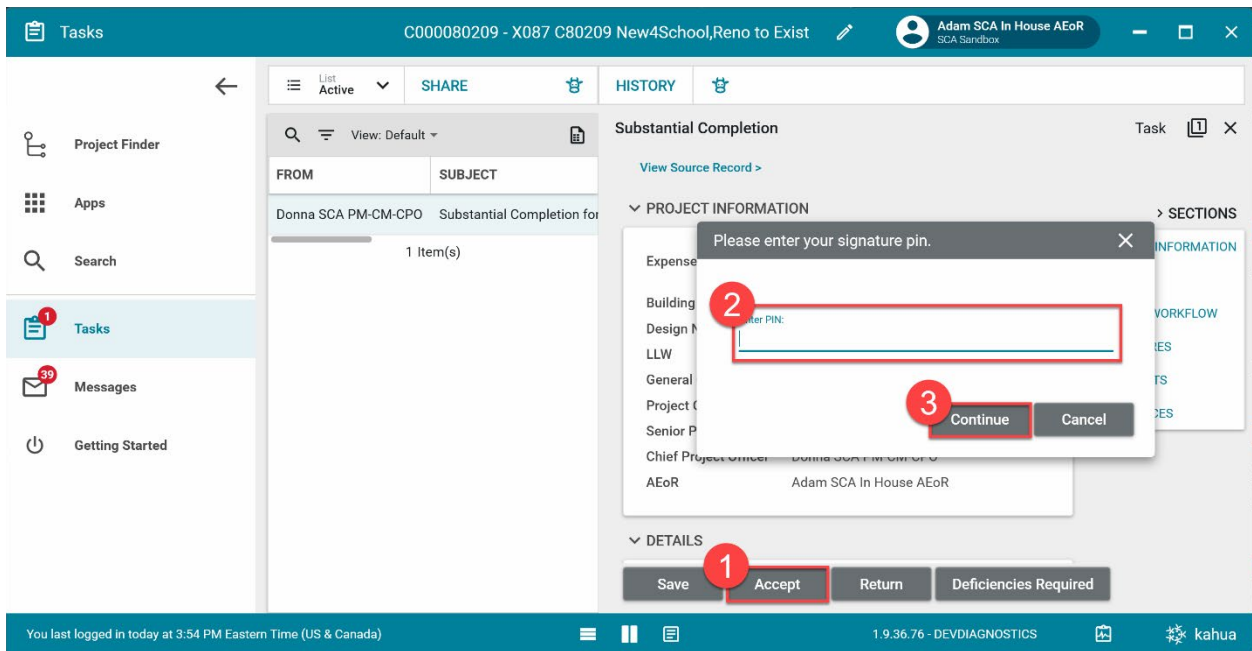2. In the References section, select … > Select Add Approval Doc
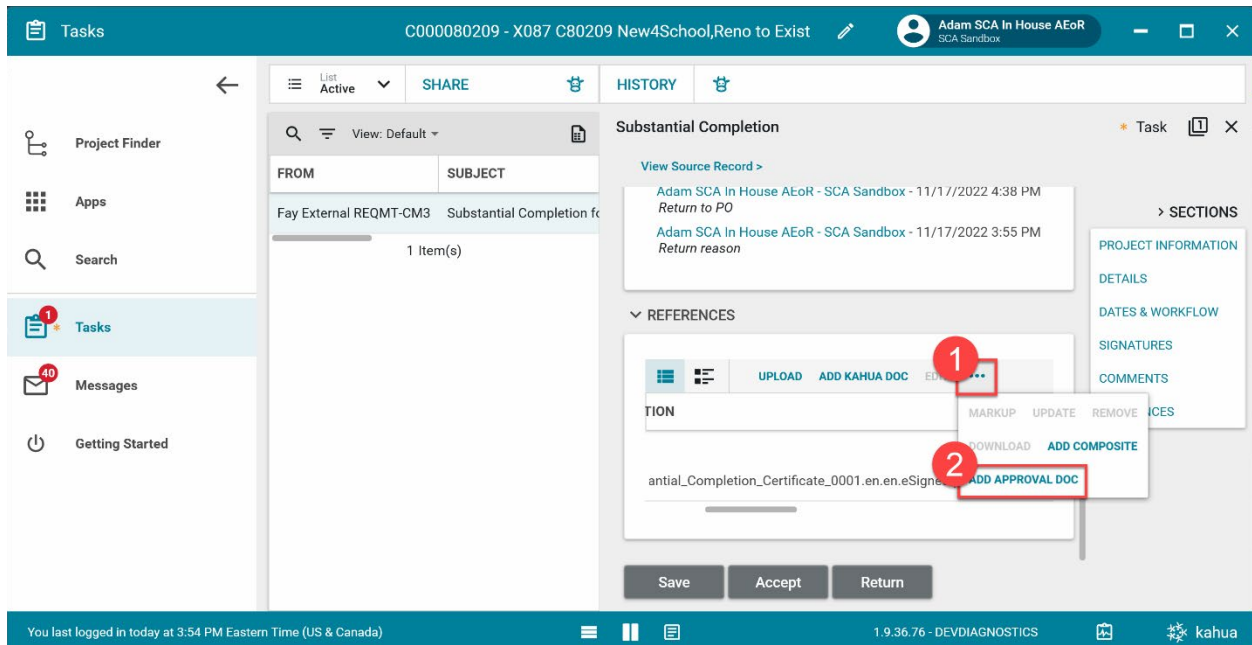
3. Enter a Filename > Select the Include checkbox for the substantial completion certificate that was signed by the GC, PO, and SPO (the description will end in .eSigned.pdf) > Click Ok

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
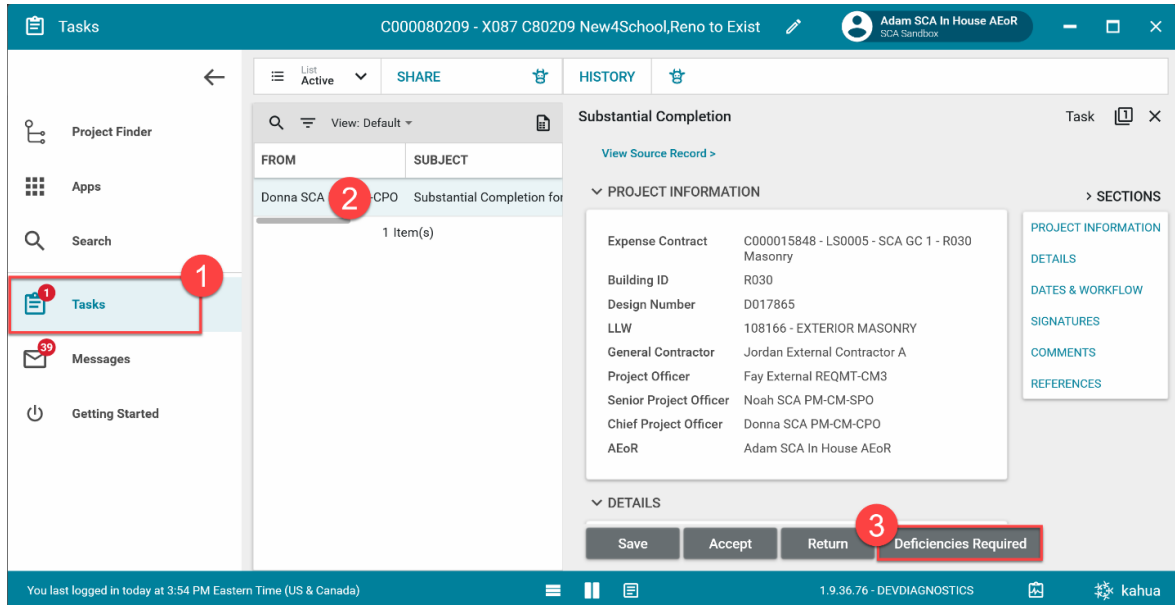
2. Click **Continue**
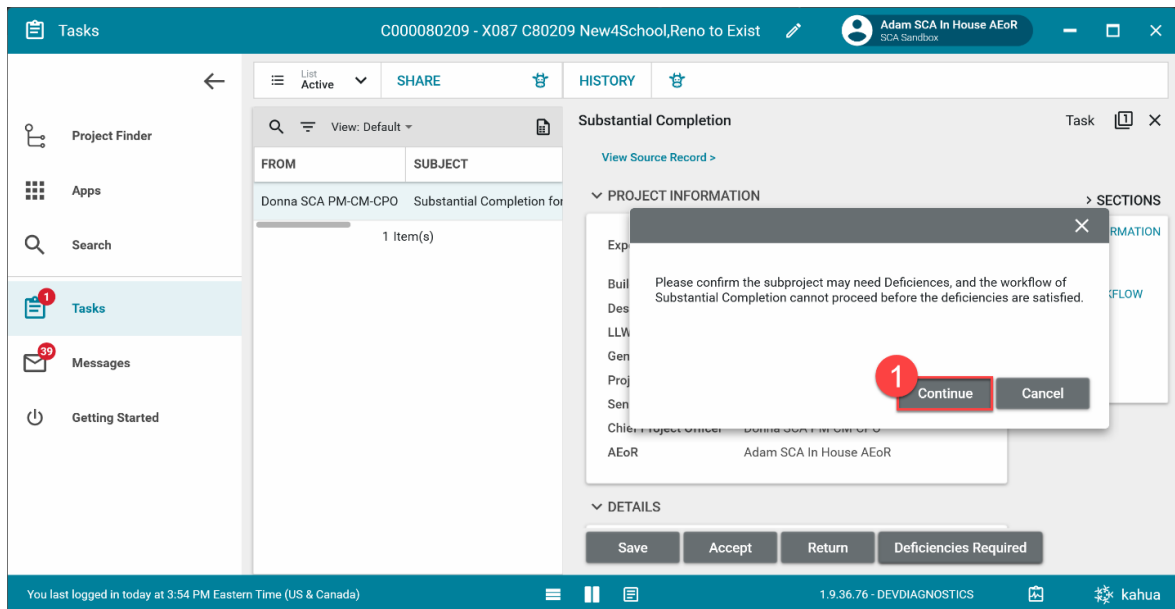
The Substantial Completion will now go to the AE DM and the CPO for DocuSign Approvals.

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**

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

PO Resubmits to AEoR – PO

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**.
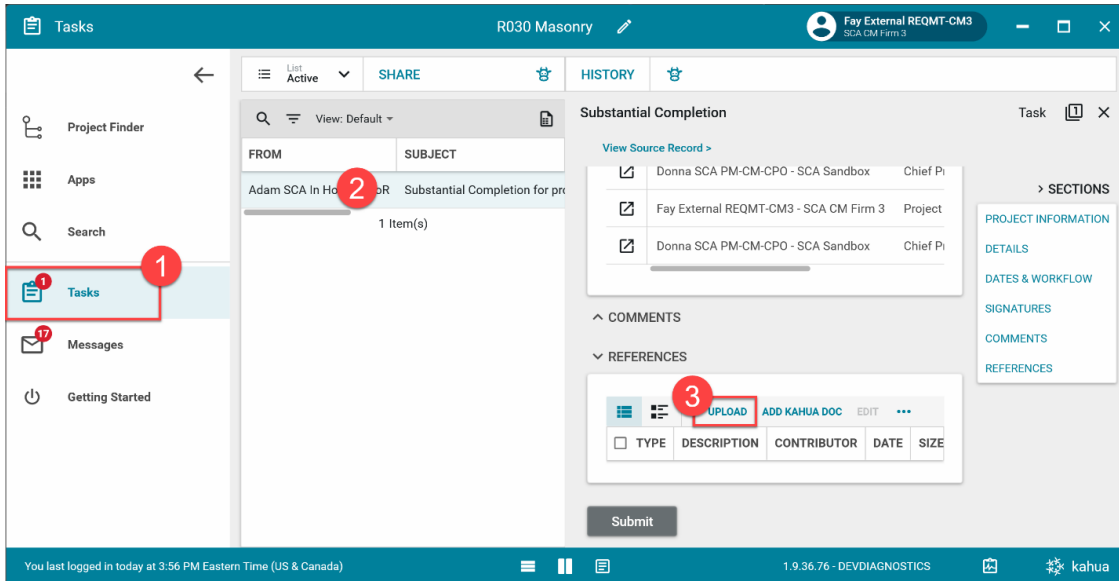
2. Click **Submit**
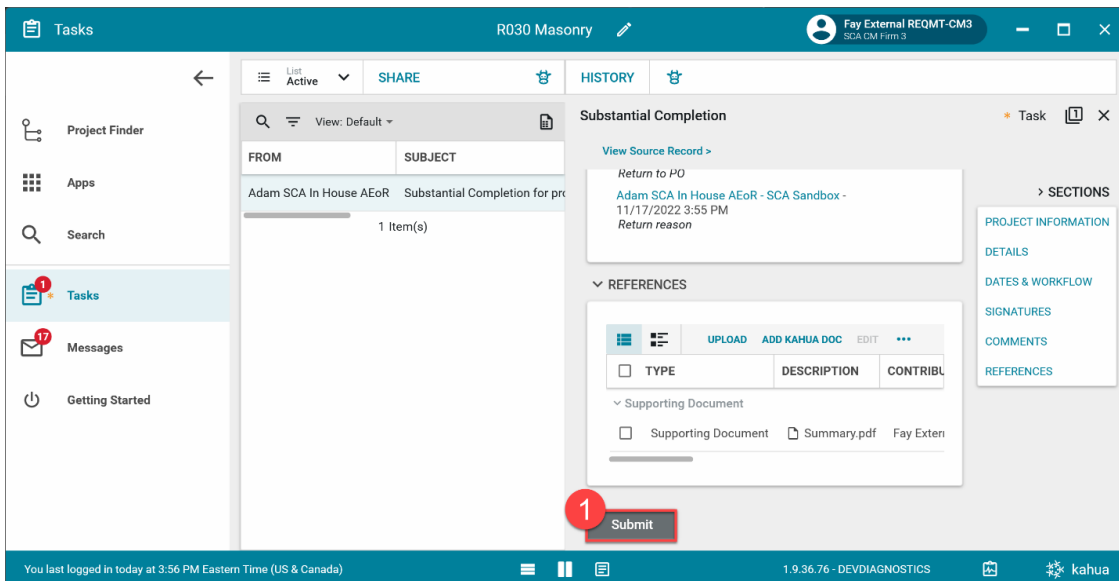
DocuSign Approvals – AE DM, CPO

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**