

Submittals Training Guide (JOC & Emergency)

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About

Submittals is a log that tracks information required to be submitted by the contractor or CM Firm for SCA's approval during the contract. Information includes but is not limited to plans, reports, logs, tests, product data, material safety data sheets, samples, drawings, diagrams, images, videos, and certificates.

Notes

While the Submittal process is consistent for all project types, the terms CM Firm and CM Project Manager are specific to Requirements projects. The CM Firm can act on behalf of the General Contractor.

Process Overview

The contractor or CM Firm enters Submittals into CAMP alongside the appropriate documentation. The submittals are sent to the CM Project Manager for administrative review. The Submittal is assigned to the Official Reviewer who may accept the Submittal, send to a Secondary Reviewer, or place the Submittal on hold for up to 30 days. Upon completion of the review cycle, the Official Reviewer will provide a response.

Three responses close the Submittal.

- No Exceptions Taken
- Make Corrections Noted
- Reviewed: No Action Taken

Two responses require the contractor or CM Firm to resubmit by starting a new review cycle.

- Revise and Resubmit
- Rejected: Not Approved

After a submittal has been completed, the contractor or CM Firm can request a new review cycle when new documentation needs to be sent to the Official Reviewer. If the original reviewer approves this request, then the CM Firm will be able to start a new cycle with new documentation uploaded.

Workflow Diagram



Step-by-Step Instructions

Create Submittal Item

Role		Preceding Steps		Outcome
Contractor, CM Firm	\rightarrow	CSI Codes are loaded.	\rightarrow	The submittal item is created.

Steps

1. Go to 'Project Finder' > Navigate to the desired program > Select the desired subproject

မို့ Project Finder	C000015647-EM0001 - X074 Defective Ceiling Repair 💉 💽 Jordan External Contractor A -	□ ×
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Project Finder	ALL PROJECTS MY PROJECTS RECENT PROJECTS Q	
Apps	Regional Connett Emergency Source Connett Fleming Engrs & Archs, P.C. CM Emergency Response Program	SELECT
	Number Name	
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2. Go to 'Apps' > Select 'Submittals'

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3. Click 'New' > Select an LLW > Enter in submittal details (one of three checkboxes must be selected) > Click 'Save/Close'

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D *	Submittals					Architect	Adam SCA In House AEoR - SCA Sandbox		
						Contractor	Gia External REQMT-CM4 - SCA CM Firm 4		
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Upload Documentation and Submit

Role		Preceding Steps		Outcome
Contractor, CM Firm	\rightarrow	The Submittal is created but has not been submitted.	\rightarrow	Sends the Submittal to the CM Project Manager or SCA PO.

Step

1. Select the desired submittal > Select 'Edit'

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							Architect	Adam SCA In House AEoR - SCA Sandbox	СОММ	IENTS
	Messages						Contractor	Gia External REQMT-CM4 - SCA CM Firm 4		
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2. In the Review Cycle section, select the '...' in the file upload column > Select 'Select File' > Select 'Save/Close'

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3. Select 'Submittals' > Select the desired Submittal > Click 'Submit'

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Download/View Submittal File

Role		Preceding Steps		Outcome
Submittal Coordinator, Official Reviewer	\rightarrow	Submittal has been submitted.	\rightarrow	Attached file can be viewed or downloaded for markup.

Steps

1. Open 'Tasks' > Select the task > In Review Cycle section, select the pop-out icon

🖆 Tasks	CO	000015647-EM0001 - X07	74 Defective Ceiling Repa	air 🧪	8	Gia External REQMT-CM SCA CM Firm 4	⁴⁴ – 🗆 ×
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			Instructions To Officia	al Reviewer			
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2. Select 'DOWNLOAD' or 'VIEW'

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Ŀ	Project Finder							↑ 1of1 🗸
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Q	Search		R	001	Submit	8/18/2022	Jordan External Contractor A - JE Co	X074 Painting Product Data.pdf VIEW DOWNLOAD
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Submittal Coordinator – Assign Official Reviewer

Role		Preceding Steps		Outcome
CM Project Manager, SCA PO	\rightarrow	The Submittal is submitted.	\rightarrow	Official Reviewer is assigned.

Step

Open 'Tasks' > Select the task > In Reviewers section, select Official Reviewer > Click 'Send to Official Reviewer'

Ê	Tasks			C000015647-EM0001 - X0	174 Defective Ceiling Repair 🖍 😫 Gia External REQMT-CM4 – 🗖
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Q	Search			I Item(s)	DETAILS
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Submittal Coordinator – Return Submittal



Step

Navigate to 'Tasks' > Select the task > In the Comments section, enter a comment > Click 'Return'

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Q Search	1 Item(s)	Response Notes	DETAILS REVIEW CYCLE
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() Getting Started		~ COMMENTS	
		New comment Save Send To Official Reviewer	
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Official Reviewer – Send to Secondary Reviewer

Role		Preceding Steps		Outcome
Official Reviewer	\rightarrow	The Submittal is assigned to the Official Reviewer	\rightarrow	The Submittal is sent to a Secondary Reviewer for response.

Step

Select 'Tasks' > Select the task > In the Secondary Reviewers section, select 'Insert' > Select 'Secondary Reviewers' > Click 'Send to Secondary Reviewers'



Secondary Reviewer – Respond to Submittal

Role		Preceding Steps		Outcome
Secondary Reviewer	\rightarrow	Official Reviewer has assigned secondary responders.	\rightarrow	Response provided to the Official Reviewer.

Steps

1. Select 'Tasks' > Select the task > In the My Response section, enter a 'Secondary Response' > *Optional:* Select 'Upload' to attach a file > Click 'Respond'

Note: The name of the uploaded file should start with the building ID (for example, Q262).

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e9	Tasks				Responder Date Sent Date Due	Calvin Kwong - CKwongCo 8/18/2022 8/18/2022	REVIEWERS MY RESPONSE
P	Messages				Instructions To Review	vers	ITEM DETAILS
123	CSI Codes					OAD REMOVE DOWNLOAD	
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ወ	Getting Started				✓ ITEM DETAILS		_
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Official Reviewer – Add Secondary Response to Official Response

Role		Preceding Steps		Outcome
Official Reviewer	\rightarrow	Secondary responses received.	\rightarrow	Selected secondary responses are added to response notes.

Steps

1. Select 'Tasks' > Select the task > In the Secondary Reviewers section, select the check box in column 'Add to Response' > Click 'Add Responses to Primary Response'

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o Project Finder	Q = View: Default		Official Reviewer Task View ((Please do not use the MARKUP function)	Task 🗓 🗙
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			Save Submit Res	esponse Send To Secondary Reviewers	
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2. Optional: Click the pop-out button to view any attached documents

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Official Reviewer – Response that Completes Workflow

Role		Preceding Steps		Outcome
Official Reviewer	\rightarrow	The Submittal is assigned.	\rightarrow	Official Reviewer responds.

Steps

1. Navigate to 'Tasks' > Select the task > In the Reviewers section. select the response of 'No Exceptions Taken', 'Make Corrections Noted', or 'Reviewed: No Action Taken' > Enter response notes

🖹 Tasks	C0000151	57-EC0001 - test 🖍 CA In House AEof	* – 🗆 ×
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Project Finder	Q = View: Default -	Official Reviewer Task View (Please do not use the MARKUP function)	Task 🗓 🗙
	FROM SUBJECT	Review Cycle Step Date Person	> SECTIONS
Apps	Gia Externi 2 MT-CM4 Submittal Number: 09900-00	2 001 Submit 8/18/2022 Jordan External Contracto	PROJECT INFORMATION
Q Search	1 Item(s)	001 Respond Adam SCA In House AEoF	DETAILS
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		Add Responses to Official Response Notes	
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2. In the References section, select 'UPLOAD' to attach a document > Click 'Submit Response'

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Official Reviewer – Response that Requires New Cycle



Steps

1. Navigate to 'Tasks' > Select the task > In the Reviewers section, select the response of 'Revise Resubmit' or 'Rejected: Not Approved' > Enter the response notes

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 Project Finder Apps Search Tasks Messages Getting Started 	Q ∓ View: Default × ₽ FROM SUBJECT Gia Externi 2 VIT-CM4 Submittal Number: 09900-0 1 Item(s)	Official Reviewer Task View (Please do not use the MARKUP function) Review Cycle Step 001 Submit 8/18/2022 Jordan External Contractc 001 Respond Adam SCA In House AEof reviewers instructions To Official Reviewer	Task I X X > SECTIONS ROJECT INFORMATION IETAILS IEVIEWE YOLE IEVIEWERS IECONDARY REVIEWE TEM DETAILS IEOMMENTS IEFERENCES
You last logged in Thursday, July 7, 2022	at 4:35 PM Eastern Time (US & Canada)	Response Notes SECONDARY REVIEWERS Save Submit Response Send To Secondary Reviewers Add Responses to Official Response Notes I.9.34.83 - DEVWEEKLY	3 🎄 kahua

2. In the Review Cycle section, select the '...' icon > Select the file to upload > Click 'Submit Response'

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Resubmit Submittal

Role		Preceding Steps		Outcome
Contractor, CM Firm	\rightarrow	The submittal requires resubmission.	\rightarrow	The Submittal is resubmitted.

Steps

1. In the Submittals app, select the desired submittal > Click 'New Review Cycle'

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2. Select the submittal > Select 'Edit'

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 In the Review Cycle section, scroll right to see the '...' icon > Select the '...' icon > Select 'SELECT FILE' to upload a file > Select 'Save / Close'

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4. Click 'Submit'

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Role		Preceding Steps		Outcome
All Actors	\rightarrow	Submittal is complete.	\rightarrow	View the documentation for the completed submittal.

Step

Select completed submittal > In the References section, click on the file to view > Click 'Download' or 'View'

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Recall Submittal

Role		Preceding Steps		Outcome
Submittal Coordinator, Official		Submittal bas been submitted		Submittal is returned to
Reviewer	\rightarrow	Submittal has been submitted.	\rightarrow	previous step.
Recall Scenarios				

Submittal has been sent to the Submittal Coordinator – Contractor/CM Firm can request recall.

Submittal has been assigned to the Official Reviewer – Submittal Coordinator can recall.

Official Reviewer sends submittal back to GC for resubmission and a new review cycle has not started – Official Reviewer can recall.

Step

In the Submittals app, select the desired submittal > Select 'Recall'

