



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.

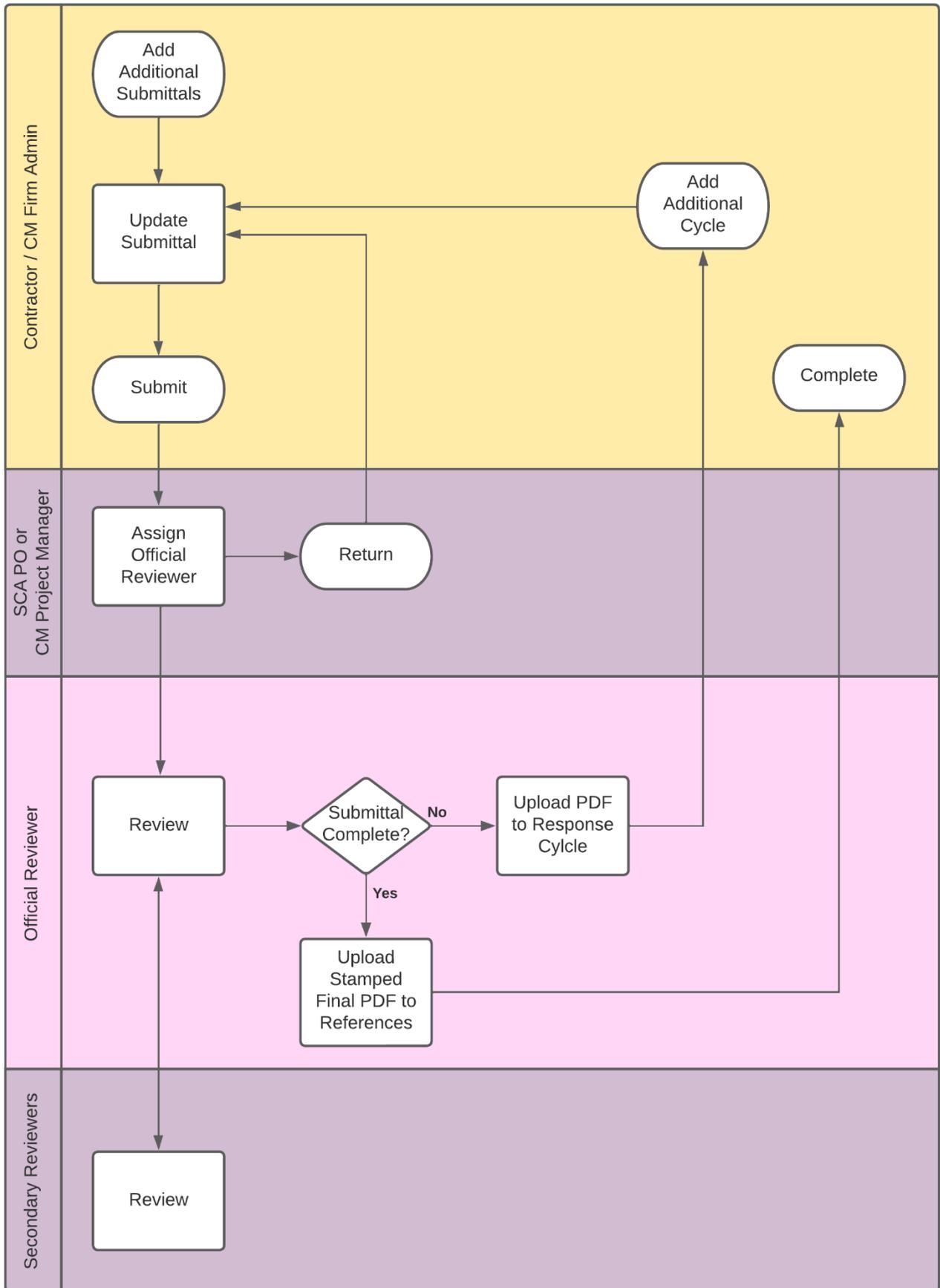
- No Exceptions Taken
- Make Corrections Noted
- Reviewed: No Action Taken

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



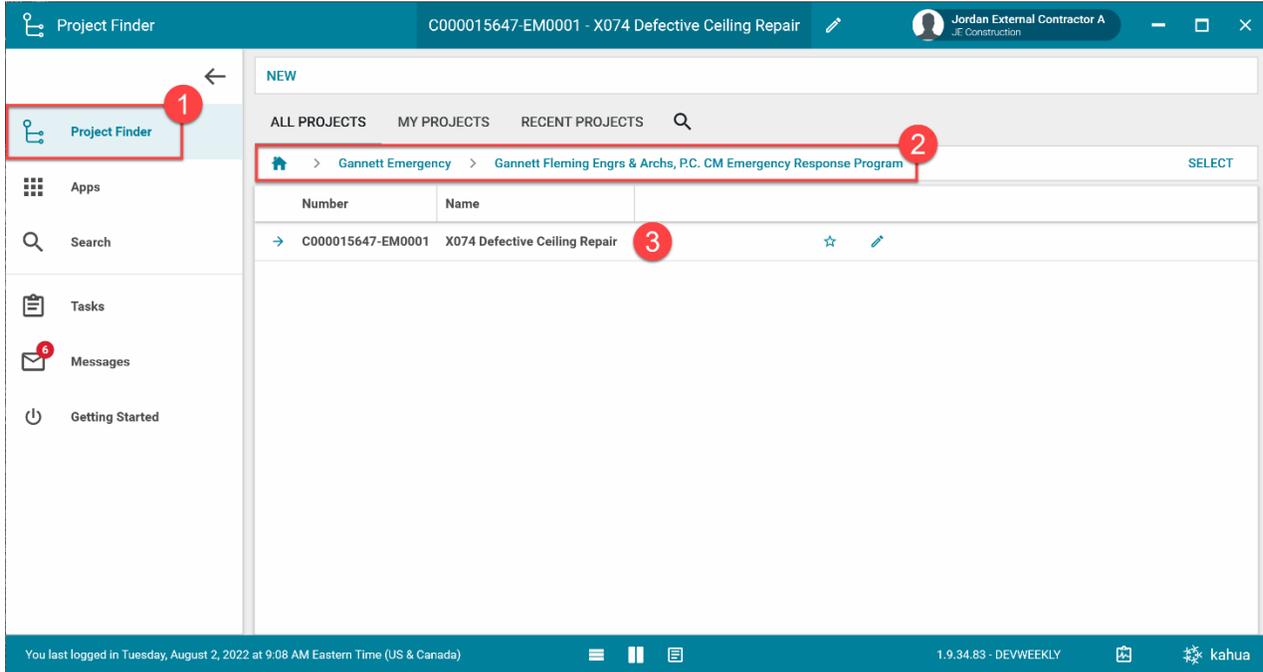
Step-by-Step Instructions

Create Submittal Item

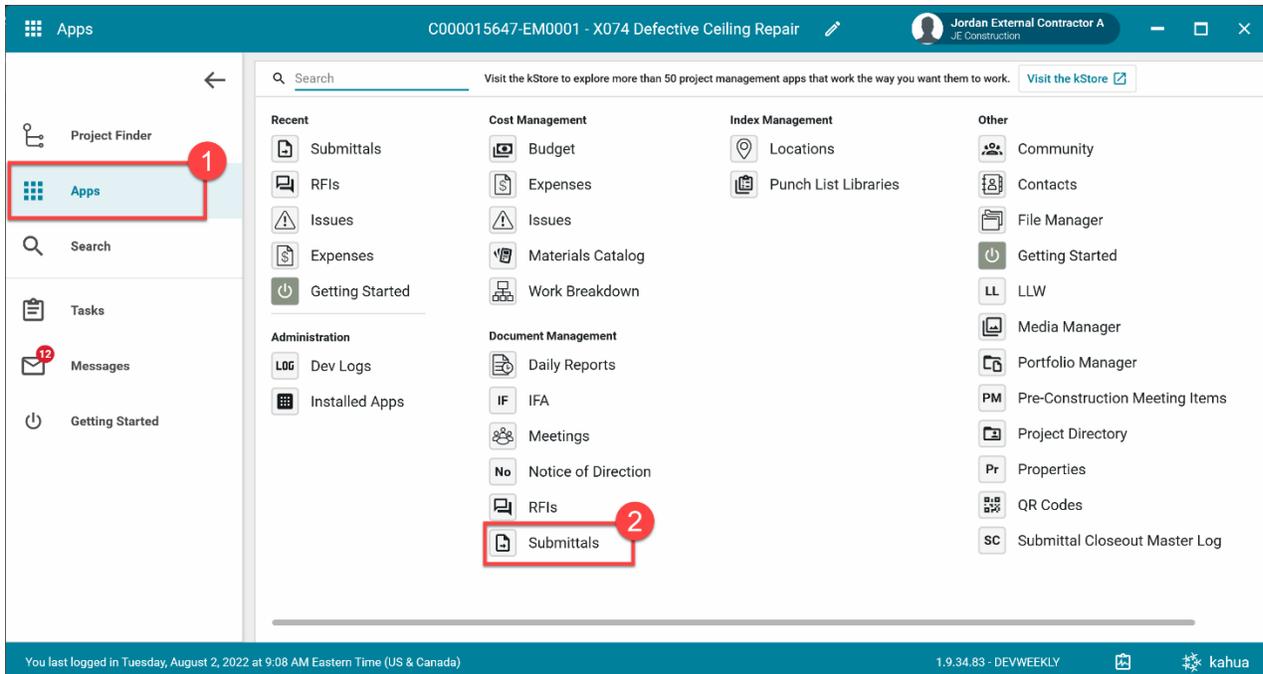
Role	Preceding Steps	Outcome
Contractor, CM Firm	→ CSI Codes are loaded.	→ The submittal item is created.

Steps

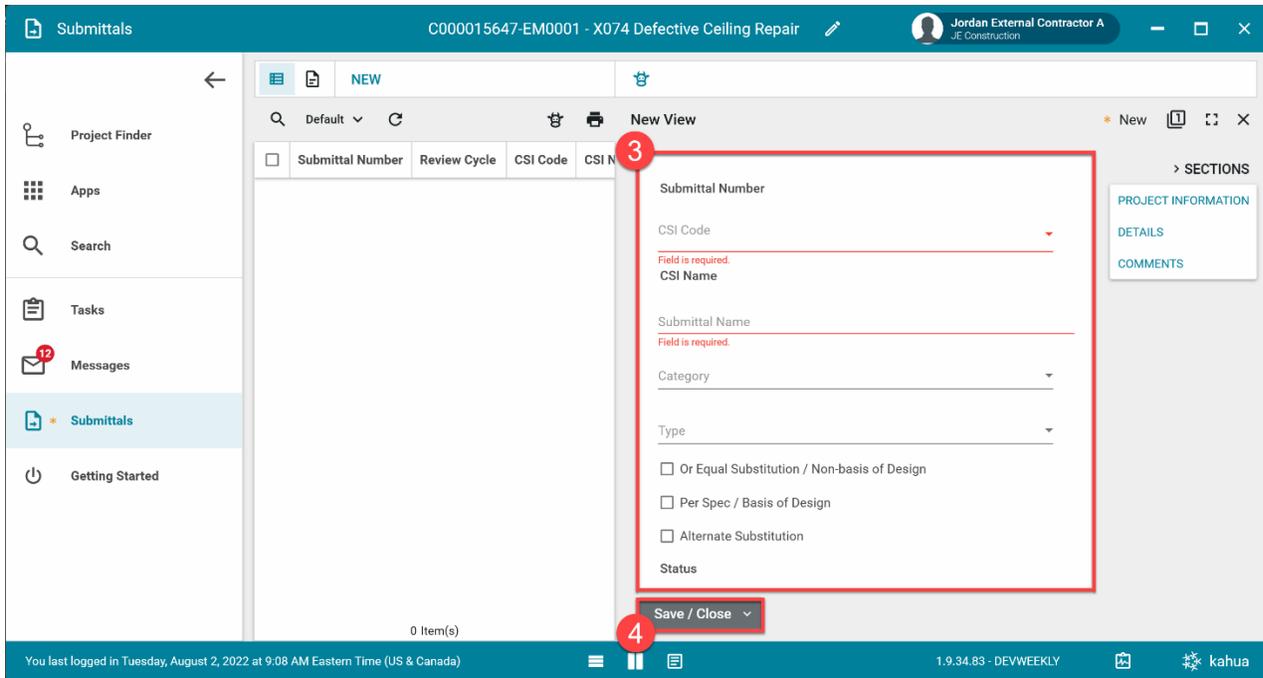
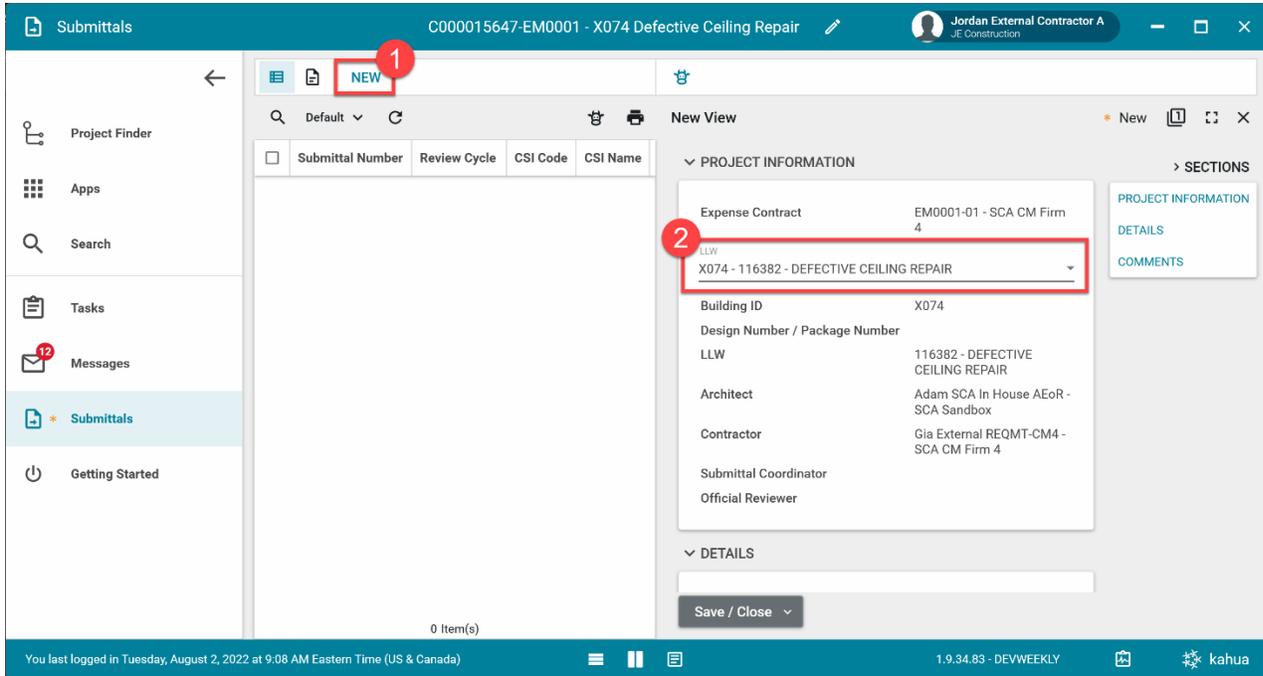
1. Go to 'Project Finder' > Navigate to the desired program > Select the desired subproject



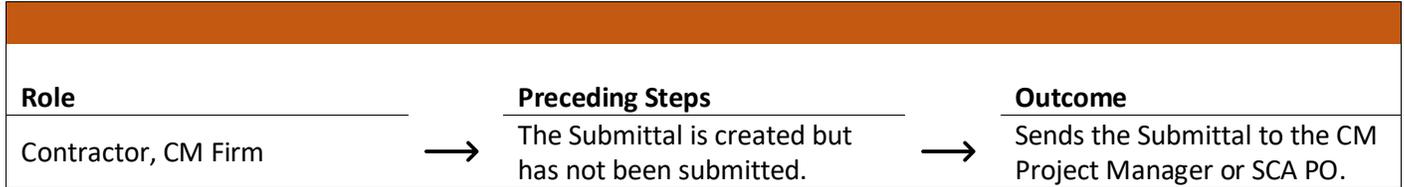
2. Go to 'Apps' > Select 'Submittals'



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

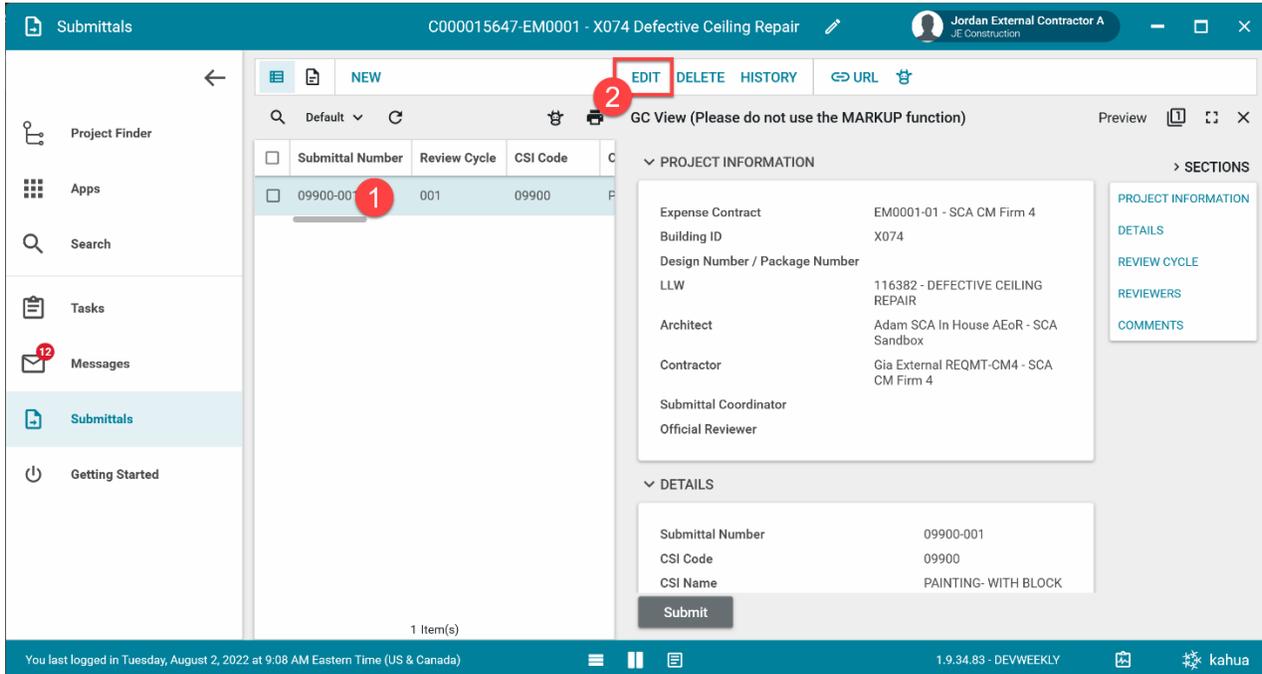


Upload Documentation and Submit

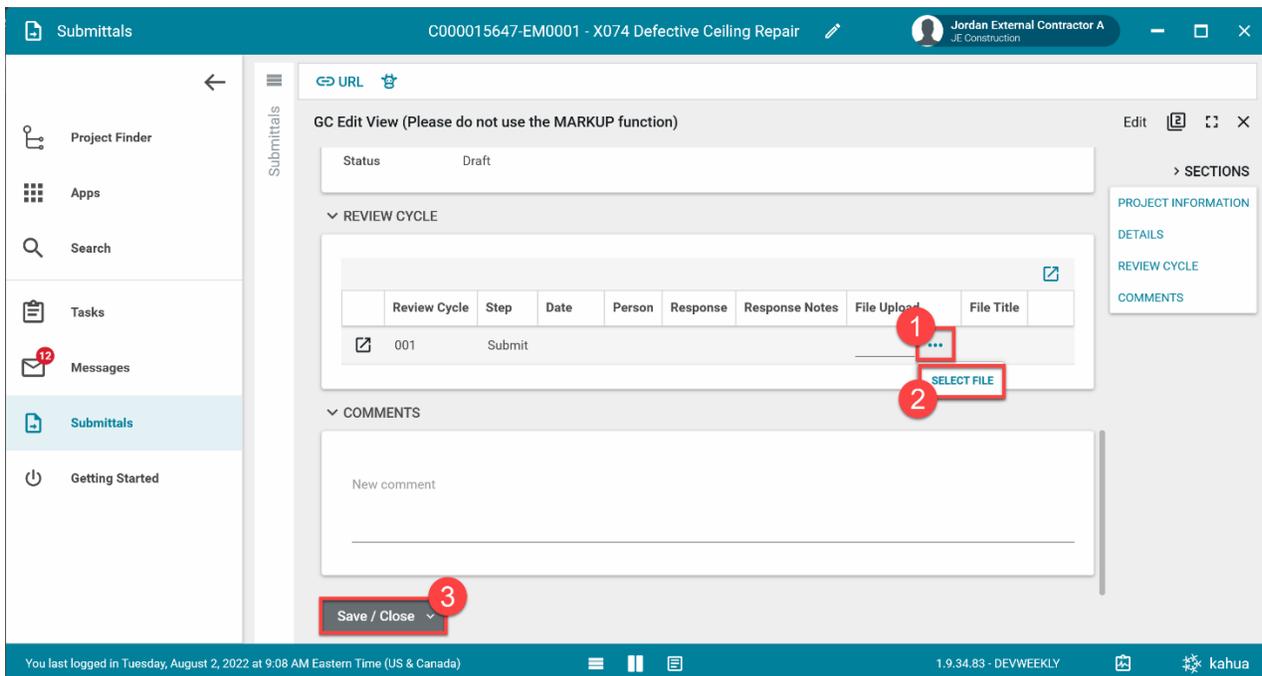


Step

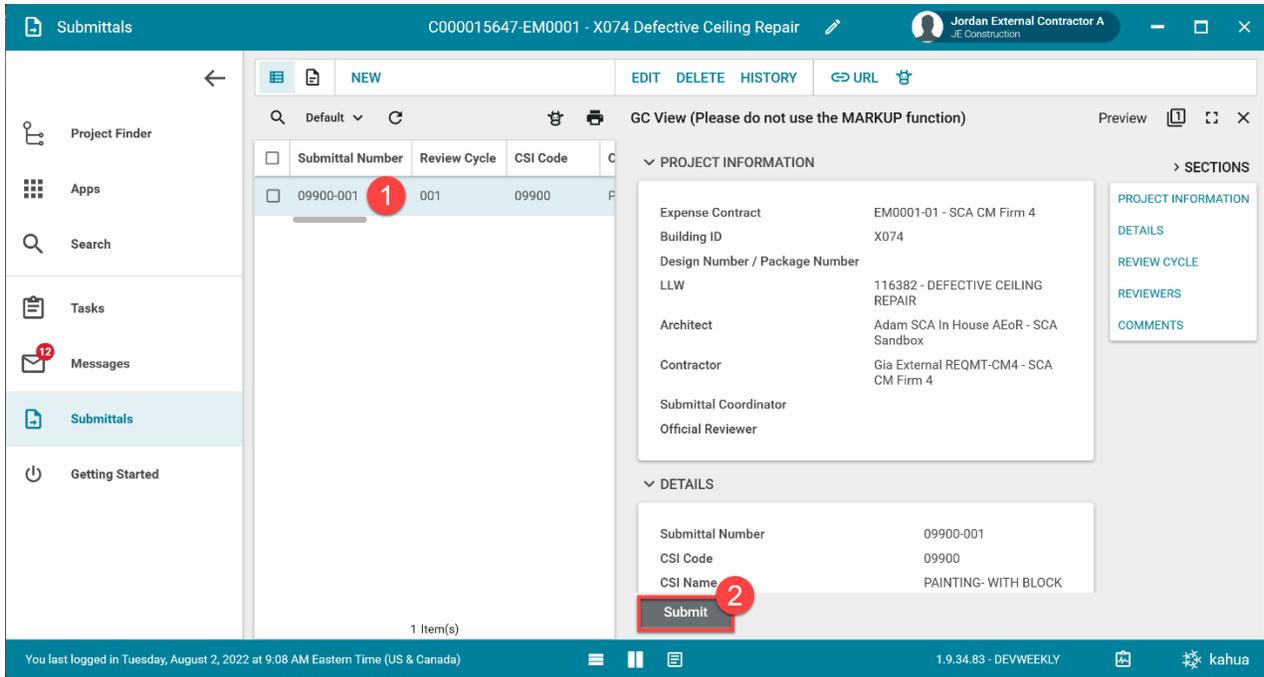
1. Select the desired submittal > Select 'Edit'



2. In the Review Cycle section, select the '...' in the file upload column > Select 'Select File' > Select 'Save/Close'



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

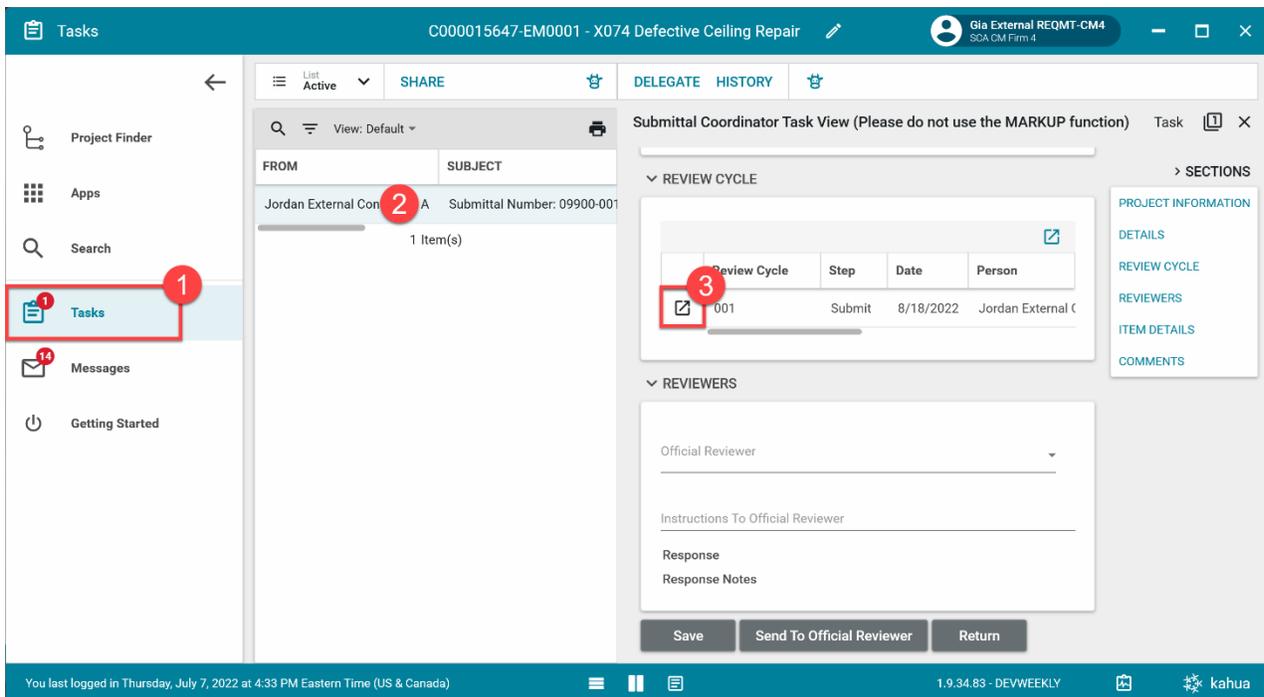


Download/View Submittal File

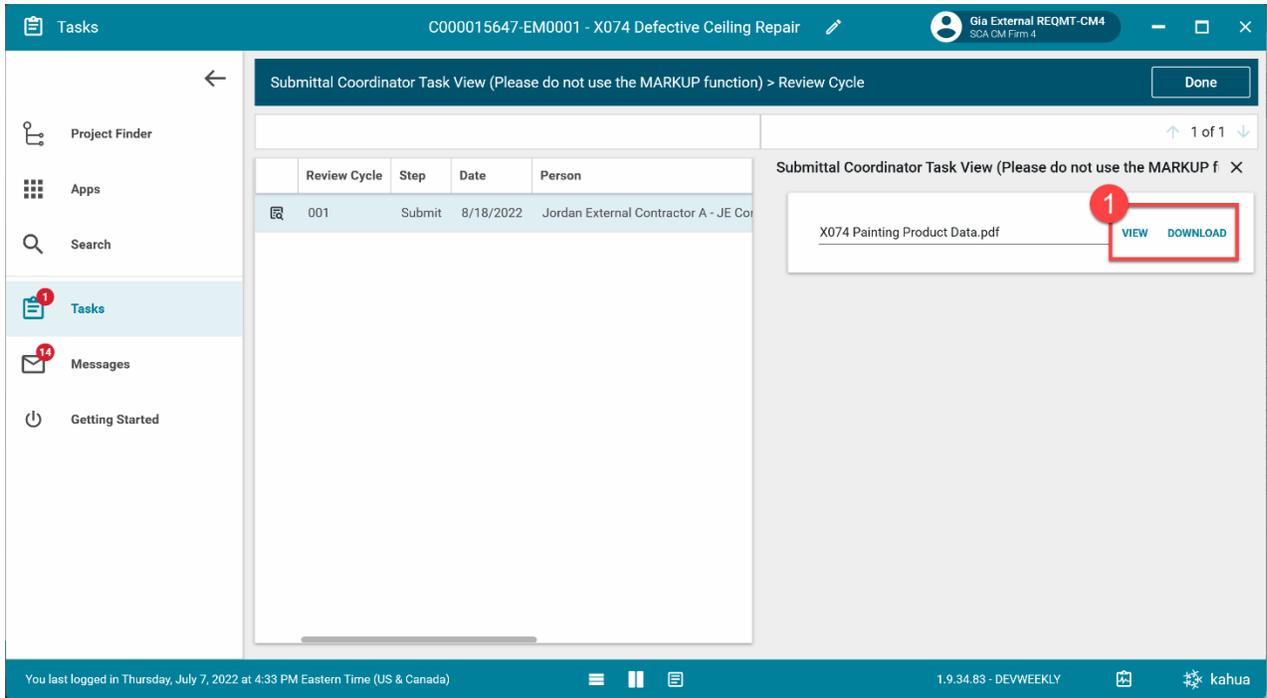


Steps

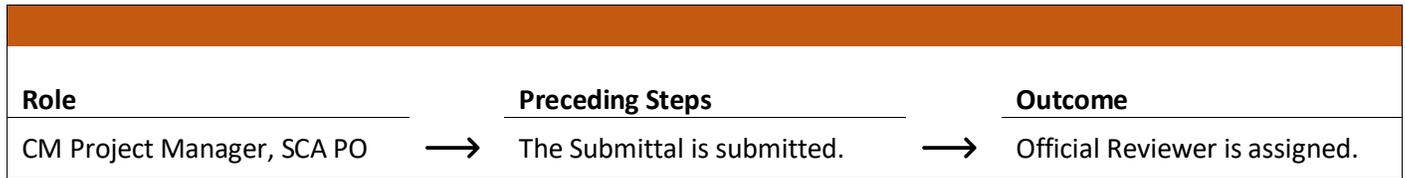
1. Open 'Tasks' > Select the task > In Review Cycle section, select the pop-out icon



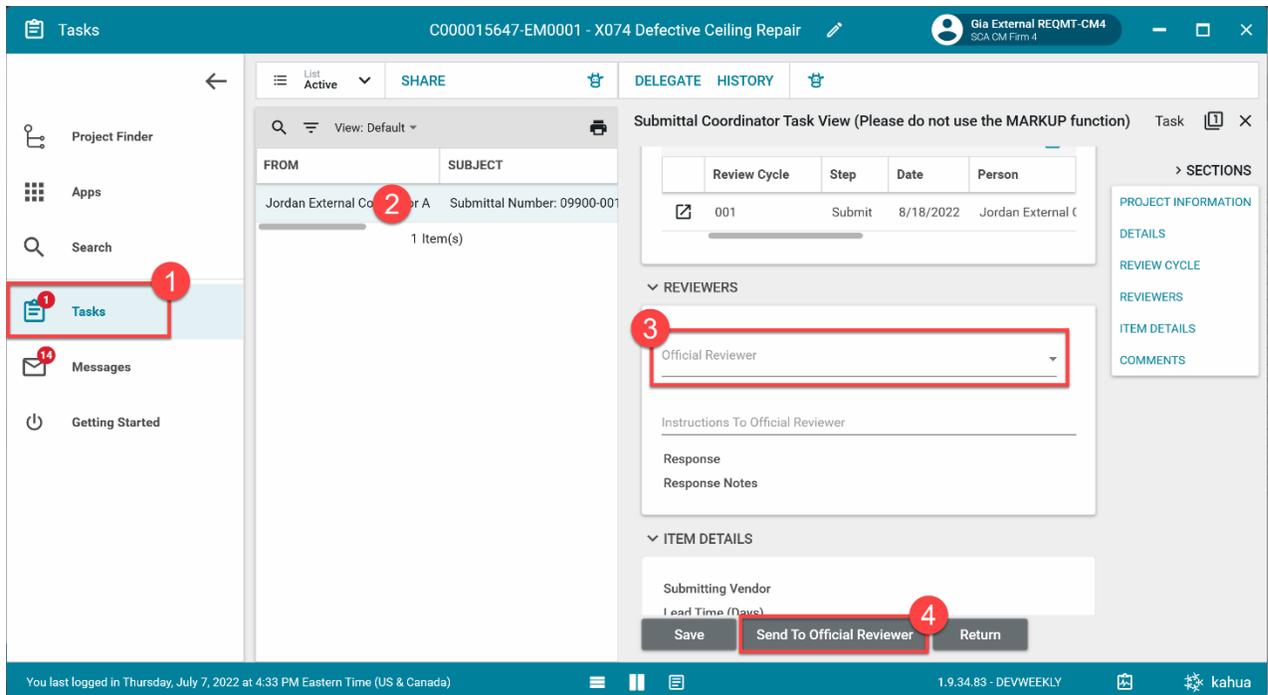
2. Select 'DOWNLOAD' or 'VIEW'



Submittal Coordinator – Assign Official Reviewer



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



Submittal Coordinator – Return Submittal

Role	Preceding Steps	Outcome
Submittal Coordinator	→ The Submittal is submitted.	→ The Submittal is returned to the contractor or CM Firm.

Step

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

The screenshot shows the 'Submittal Coordinator Task View' interface. The left sidebar contains navigation options: Project Finder, Apps, Search, Tasks (highlighted with a red box and a red circle containing the number 1), Messages (with a 13 message notification), and Getting Started. The main content area is titled 'Submittal Coordinator Task View (Please do not use the MARKUP function)'. It features a table with columns 'FROM' and 'SUBJECT'. The first row shows 'Jordan External Coordinator A' and 'Submittal Number: 09900-001', with a red circle containing the number 2 next to the 'FROM' cell. Below the table, it indicates '1 Item(s)'. The right side of the interface has several sections: 'Instructions To Official Reviewer', 'Response', 'Response Notes', 'ITEM DETAILS' (containing 'Submitting Vendor' and 'Lead Time (Days)'), and 'COMMENTS' (containing a 'New comment' text input field with a red box and a red circle containing the number 3). At the bottom of the task view, there are three buttons: 'Save', 'Send To Official Reviewer', and 'Return' (highlighted with a red box and a red circle containing the number 4). The top of the interface shows the project name 'C000015647-EM0001 - X074 Defective Ceiling Repair' and the user 'Gia External REQMT-CM4 SCA CM Firm 4'. The bottom status bar shows the login time 'Thursday, July 7, 2022 at 4:33 PM Eastern Time (US & Canada)', system version '1.9.34.83 - DEVWEEKLY', and the user 'kahua'.

Official Reviewer – Send to Secondary Reviewer

Role	Preceding Steps	Outcome
Official Reviewer	→ The Submittal is assigned to the Official Reviewer →	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 Reviewer' > Click 'Send to Secondary Reviewers'

The screenshot shows the 'Official Reviewer Task View' for a task titled 'Official Reviewer Task View (Please do not use the MARKUP function)'. The interface includes a left sidebar with navigation options like 'Project Finder', 'Apps', 'Search', 'Tasks', 'Messages', and 'Getting Started'. The main content area is divided into several sections:

- FROM / SUBJECT:** A table listing the task source: 'Gia External REC M4' with 'Submittal Number: 09900-001'. A red circle '2' highlights the task name.
- Response:** A dropdown menu and a text area for 'Response Notes'.
- SECONDARY REVIEWERS:** A section with 'Instructions To Reviewers' and a table for adding reviewers. A red circle '3' highlights the 'insert' button, and a red circle '4' highlights the 'Secondary Reviewer' dropdown menu.
- ITEM DETAILS:** A section with buttons for 'Save', 'Submit Response', and 'Send To Secondary Reviewers'. A red circle '5' highlights the 'Send To Secondary Reviewers' button.

At the bottom of the screen, there is a status bar showing the user's login time and system version: 'You last logged in Thursday, July 7, 2022 at 4:35 PM Eastern Time (US & Canada)' and '1.9.34.83 - DEVWEEKLY'.

Secondary Reviewer – Respond to Submittal

Role	Preceding Steps	Outcome
Secondary Reviewer	→ Official Reviewer has assigned secondary responders.	→ 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).

The screenshot displays the 'Secondary Responder Task View' interface. The top navigation bar shows the task title 'C000015647-EM0001 - X074 Defective Ceiling Repair' and the user 'Calvin Kwong'. The left sidebar contains navigation options like 'Tasks', 'Messages', 'CSI Codes', 'Submittals', and 'Getting Started'. The main content area is divided into several sections:

- FROM / SUBJECT:** A table listing the sender 'Adam SCA In AEO R' and the subject 'Submittal Number: 09900-001'. A red circle '2' highlights the 'FROM' column.
- MY RESPONSE:** A section containing response details such as 'Responder: Calvin Kwong - CKwongCo', 'Date Sent: 8/18/2022', and 'Date Due: 8/18/2022'. Below this is a text input field for 'Secondary Response' with a red circle '3' around it.
- UPLOAD:** A button labeled 'UPLOAD' with a red circle '4' around it, used for attaching files.
- ITEM DETAILS:** A section for 'Submitting Vendor' with a 'Respond' button highlighted by a red circle '5'.

Red circles '1' and '1' also highlight the 'Tasks' icon in the sidebar and the 'Tasks' header in the main view, respectively.

Official Reviewer – Add Secondary Response to Official Response

Role	Preceding Steps	Outcome
Official Reviewer	→ Secondary responses received.	→ 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'

The screenshot shows the 'Official Reviewer Task View' 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 list of tasks with 'Gia External REQMT-CM4' selected, indicated by a red box and a '2' in a red circle. Below the list is a table with columns: 'Date Due', 'Response Date', 'Response', and 'Add to Response'. The 'Add to Response' checkbox for the selected task is checked, indicated by a red box and a '3' in a red circle. Below the table, the 'Send To Secondary Reviewers' button is highlighted with a red box and a '4' in a red circle.

2. *Optional:* Click the pop-out button to view any attached documents

The screenshot shows the 'Official Reviewer Task View' interface, similar to the first screenshot. 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 list of tasks with 'Gia External REQMT-CM4' selected. Below the list is a table with columns: 'Date Due', 'Response Date', 'Response', and 'Add to Response'. The 'Add to Response' checkbox for the selected task is checked, indicated by a red box and a '1' in a red circle.

Official Reviewer – Response that Completes Workflow

Role	Preceding Steps	Outcome
Official Reviewer	→ The Submittal is assigned.	→ 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

The screenshot shows the 'Official Reviewer Task View' for a task titled 'Official Reviewer Task View (Please do not use the MARKUP function)'. The interface includes a left sidebar with navigation options like 'Project Finder', 'Apps', 'Search', 'Tasks', 'Messages', and 'Getting Started'. The main content area is divided into several sections: 'FROM' and 'SUBJECT' fields, a 'REVIEWERS' table, 'INSTRUCTIONS TO OFFICIAL REVIEWER' with a 'Response' dropdown and 'Response Notes' text area, and 'SECONDARY REVIEWERS' section. At the bottom, there are buttons for 'Save', 'Submit Response', and 'Send To Secondary Reviewers'. A status bar at the very bottom indicates the user is logged in on Thursday, July 7, 2022.

2. In the References section, select 'UPLOAD' to attach a document > Click 'Submit Response'

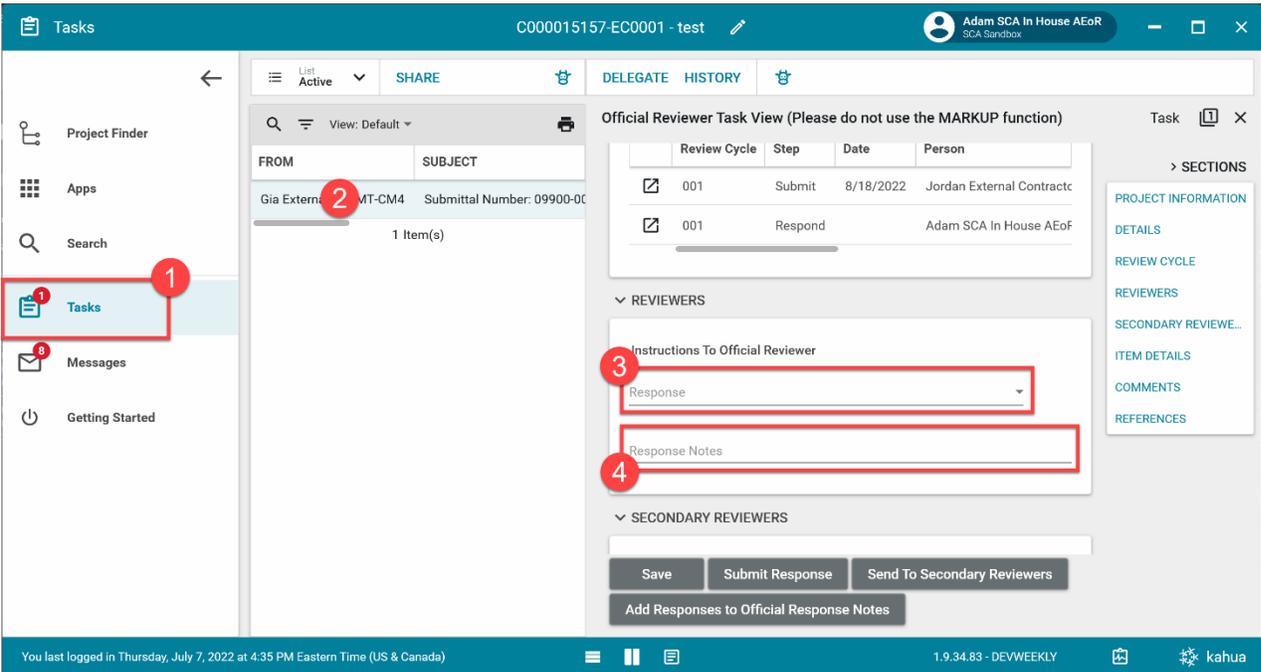
This screenshot shows the same 'Official Reviewer Task View' but with the 'REFERENCES' section expanded. It features a table with columns for 'TYPE', 'DESCRIPTION', 'CONTRIBUTOR', 'DATE', 'SIZE', and 'MARKUP?'. Above the table are 'UPLOAD' and 'DOWNLOAD' buttons. Below the table are the same 'Save', 'Submit Response', and 'Send To Secondary Reviewers' buttons. The 'Submit Response' button is highlighted with a red box and a circled '2'. The status bar at the bottom remains the same as in the previous screenshot.

Official Reviewer – Response that Requires New Cycle

Role	Preceding Steps	Outcome
Official Reviewer	→ Submittal received.	→ Response is completed if the Official Reviewer approves.

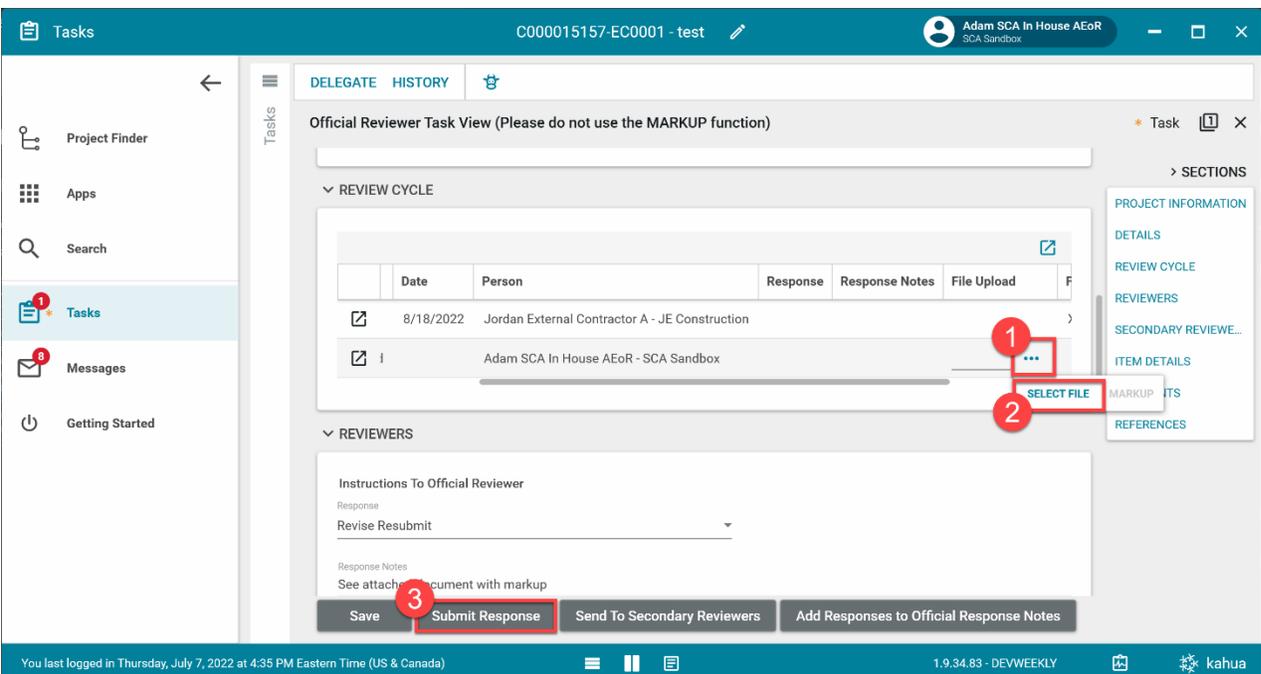
Steps

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



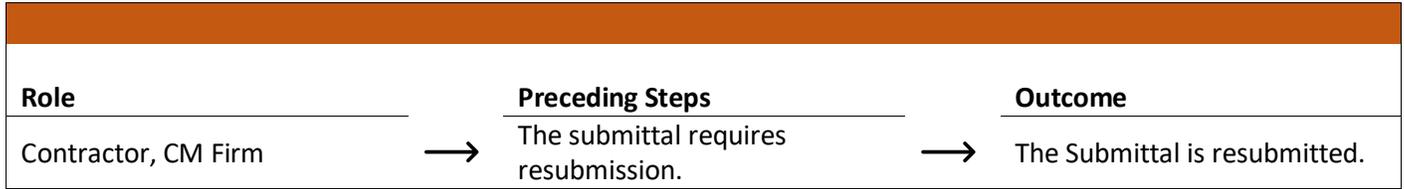
The screenshot shows the 'Official Reviewer Task View' for task ID C000015157-EC0001 - test. The interface includes a left sidebar with navigation options like 'Project Finder', 'Apps', 'Search', 'Tasks', 'Messages', and 'Getting Started'. The main content area is divided into sections: 'Review Cycle', 'Reviewers', and 'Secondary Reviewers'. In the 'Reviewers' section, there is a dropdown menu for 'Response' and a text area for 'Response Notes'. Red annotations highlight the 'Tasks' menu item (1), the task selection (2), the 'Response' dropdown (3), and the 'Response Notes' text area (4).

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



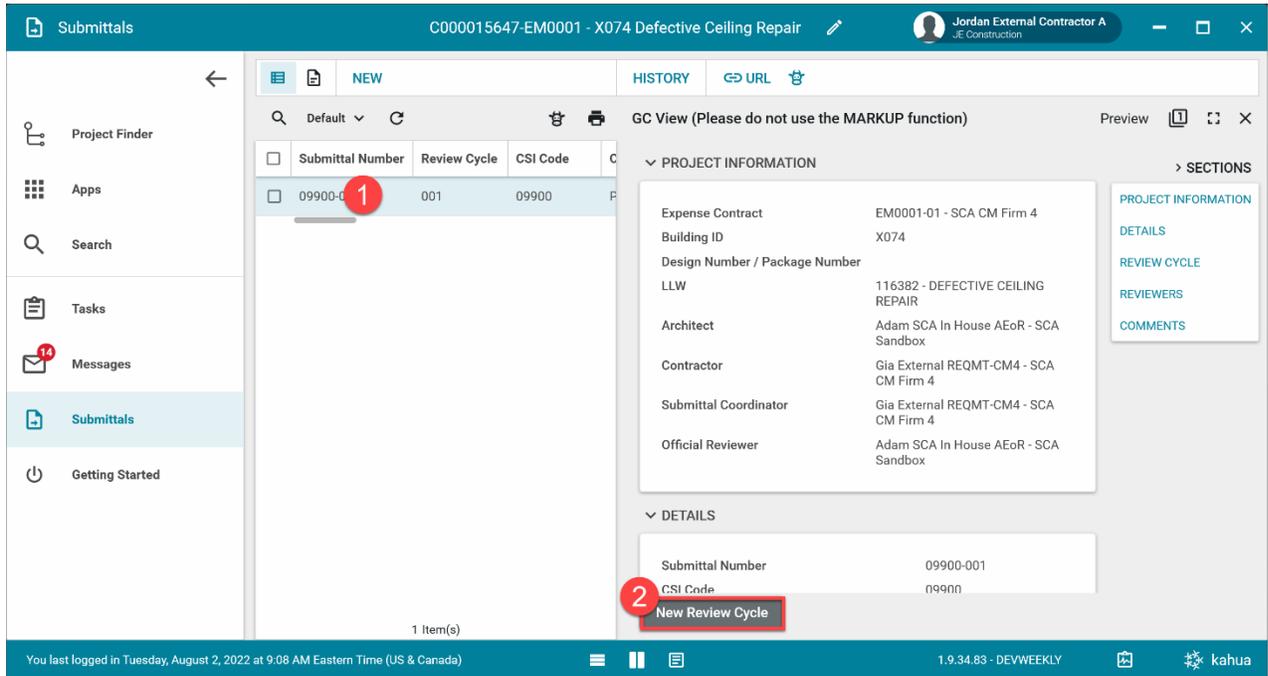
The screenshot shows the 'Official Reviewer Task View' for task ID C000015157-EC0001 - test. The interface includes a left sidebar with navigation options like 'Project Finder', 'Apps', 'Search', 'Tasks', 'Messages', and 'Getting Started'. The main content area is divided into sections: 'Review Cycle', 'Reviewers', and 'Secondary Reviewers'. In the 'Review Cycle' section, there is a table with columns for 'Date', 'Person', 'Response', 'Response Notes', and 'File Upload'. A red circle (1) highlights the '...' icon in the 'File Upload' column, and a red box (2) highlights the 'SELECT FILE' button. In the 'Reviewers' section, there is a dropdown menu for 'Response' and a text area for 'Response Notes'. A red circle (3) highlights the 'Submit Response' button.

Resubmit Submittal

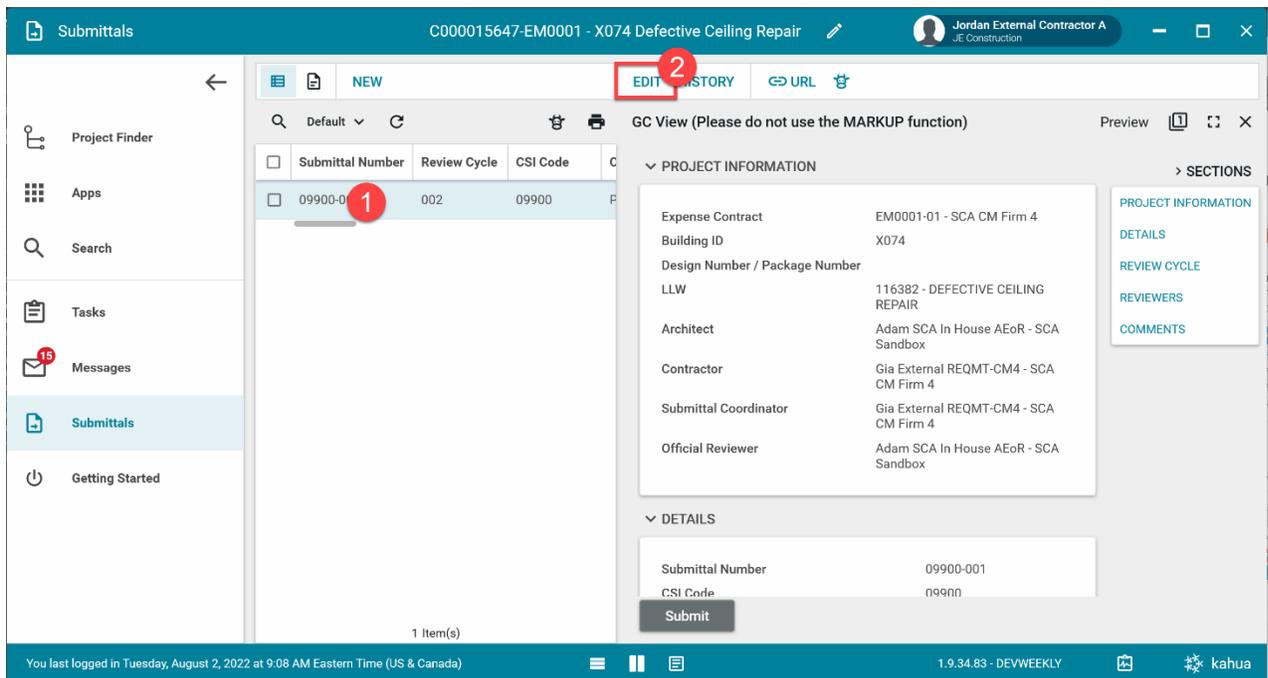


Steps

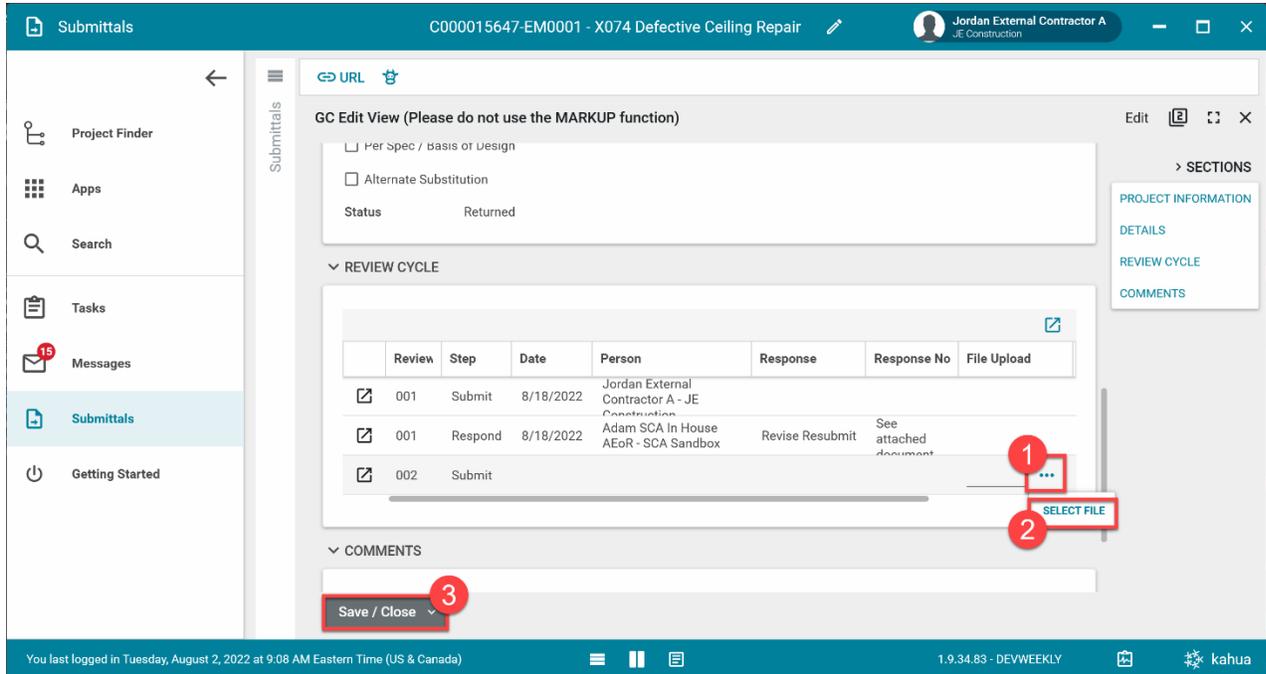
1. In the Submittals app, select the desired submittal > Click 'New Review Cycle'



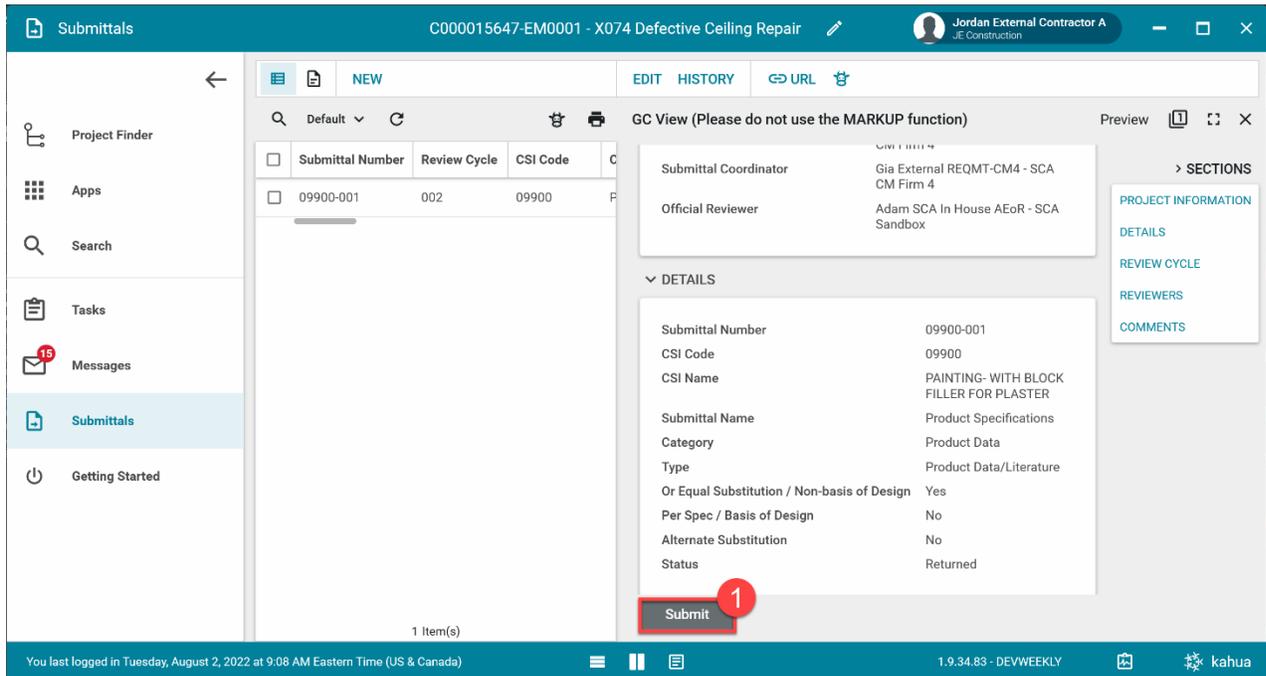
2. Select the submittal > Select 'Edit'



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



- Click 'Submit'



Download/View Completed Submittal File

Role	Preceding Steps	Outcome
All Actors	→ Submittal is complete.	→ 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'

The screenshot displays the 'Submittals' application interface for project 'C000015647-EM0001 - X074 Defective Ceiling Repair'. The interface includes a sidebar with navigation options like 'Project Finder', 'Apps', 'Search', 'Tasks', 'Messages', 'Submittals', and 'Getting Started'. The main content area shows a table of submittals with columns for 'Submittal Number', 'Review Cycle', 'CSI Code', and 'CSI Name'. A submittal with ID '09900-00' and 'Review Cycle' '002' is highlighted, with a red circle '1' around the ID. To the right, the 'Complete View' panel shows details for this submittal, including a table of actions (Respond, Submit, Respond) and a 'REFERENCES' section. In the 'REFERENCES' section, a 'Supporting Document' is listed as 'X074 Painting Product Data.pdf'. A red circle '2' is around the document name, and a red circle '3' is around the 'VIEW' and 'DOWNLOAD' buttons. A 'SECTIONS' sidebar on the right lists 'PROJECT INFORMATION', 'DETAILS', 'REVIEW CYCLE', 'COMMENTS', and 'REFERENCES'.

Submittal Number	Review Cycle	CSI Code	CSI Name
09900-00	002	09900	PAINTIN...

Item	Type	Description
001	Respond	8/18/2022 Adam SCA In H
002	Submit	8/18/2022 Jordan Externa
002	Respond	8/18/2022 Adam SCA In H

Supporting Document
Suppc document X074 Painting Product Data.pdf

Recall Submittal

Role	Preceding Steps	Outcome
Submittal Coordinator, Official Reviewer	→ Submittal has been submitted. →	Submittal is returned to 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'

The screenshot shows the 'Submittals' app interface. The top navigation bar includes 'Submittals', the project ID 'C000015647-EM0001 - X074 Defective Ceiling Repair', and the user 'Adam SCA In House AEoR'. The left sidebar contains navigation options: Project Finder, Apps, Search, Tasks, Messages (with a notification badge), Submittals (selected), and Getting Started. The main content area displays a table of submittals with columns for Submittal Number, Review Cycle, CSI Code, and CSI Name. A red circle with the number '1' highlights the first row. Below the table, a 'Preview View' panel is open, showing project information and details. A red circle with the number '2' highlights the 'Recall' button in the details section.

Submittal Number	Review Cycle	CSI Code	CSI Name
09900-001	001	09900	PAINTIN...

PROJECT INFORMATION

Expense Contract	EM0001-01 - SCA CM Firm 4
Building ID	X074
Design Number / Package Number	
LLW	116382 - DEFECTIVE CEILING REPAIR
Architect	Adam SCA In House AEoR - SCA Sandbox
Contractor	Gia External REQMT-CM4 - SCA CM Firm 4
Submittal Coordinator	Gia External REQMT-CM4 - SCA CM Firm 4
Official Reviewer	Adam SCA In House AEoR - SCA Sandbox

DETAILS

CSI Code	09900
CSI Name	PAINTING- WITH BLOCK FILLER FOR PLASTER

Recall