

Substantial Completion Training Guide

Date Created: 10/11/2022 Date Updated: 11/11/2022

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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.

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 emaild. 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-Step Instructions

## **Create Substantial Completion**

Role		Preceding Steps		Outcome
GC, CM Firm on behalf of GC	$\rightarrow$	None.	$\rightarrow$	A substantial completion request is created.

#### Steps

1. Go to 'Project Finder' > Select desired subproject

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2. Go to 'Apps' > Select 'Closeout' App

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3. Select the 'Substantial Completion' tab > Click 'New' > Enter required fields (Date of Substantial Completion certified by GC) > Click 'Save/Close'

**Note:** In a subproject with multiple expense contracts, you will need to select the relevant expense contract at the top of the form. Only one substantial completion request can be created per contract.

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## **Update Substantial Completion Request**

Role	Preceding Steps	Outcome
GC, CM on behalf of GC	Substantial completion request exists.	The substantial completion request has been updated.

## Steps

1. Select the desired request to update > Click 'Edit'

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2. Update fields as required > Click 'Save/Close'

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Role		Preceding Steps		Outcome
GC, CM on behalf of GC	$\rightarrow$	Substantial completion request exists.	$\rightarrow$	A DocuSign is sent to the GC/CM Firm on behalf of GC.

#### Step

Select substantial completion request > Click 'Submit'

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## DocuSign Approve – GC, PO, SPO

Role	Preceding Steps	Outcome
Order: CC > PO > SPO	 Substantial Completion	 Substantial completion request
01del. GC > PO > 3PO	 request has been submitted.	 is DocuSigned.

Steps

- 1. Go to email account (external) > Select email titled 'Certificate of Substantial Completion'
- 2. Click 'Review Document' button in email
- Click 'Continue' > Click 'Sign' button on the document > Select desired signature details > Click 'Adopt and Sign' button > Click 'Finish' button

## Attach Documents in Substantial Package Create Substantial Package

Role		Preceding Steps		Outcome
PO, CM Project Manager	$\rightarrow$	Substantial completion request has been submitted.	$\rightarrow$	Documents attached and request is PIN Signed.

#### Steps

1. Go to 'Project Finder' > Select desired subproject

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2. Go to 'Apps' > Select 'Closeout' App

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3. Select the 'Transfers' tab > Click 'New' > Select the 'Type' to be **Substantial Package** > Select 'Next'

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4. Click 'Save/Close'

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#### **Attach Documents**

Role	Preceding Steps	Outcome
PO, CM Project Manager	Substantial package has been created.	→ Items are attached to the substantial package.

#### Steps

1. Select the substantial package > Select 'Edit'

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2. In the Transfer Package section, there will be a list of required documents to upload. In the appropriate row, select '...' > Click 'Select File'

Note: You must Save the record once before the items will show up in the Transfer package.

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3. To mark an item as not required, unselect the 'Required' checkbox for that row > Enter a 'PO Comment'.

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4. Select 'Save/Close'

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Submit	Substantial	Package
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Role	Preceding Steps		Outcome
DO (CNA Draigat Managar	 All files have been uploaded or		Transfer package is submitted
PO/CIVI Project Manager	marked as not required.	$\rightarrow$	to the SPO and CPO.
Chara			

#### Step



## Approve Substantial Package – SPO, CPO

Role		Preceding Steps	_	Outcome
Order: SPO > CPO	$\rightarrow$	Substantial package submitted.	$\rightarrow$	Transfer package is approved.

#### Steps

1. Go to 'Tasks' > Select the Substantial Package Task

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2. In the transfer package section, select '...' > Click 'View' or 'Download' to review the file > Optional: Add a comment in the 'SPO Comment' or 'CPO Comment' column

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3. Select 'Accept' (SPO) or 'Transfer to DSF' (CPO)

**Note:** The following image shows an example of selecting 'Accept' as the PO. The button for the CPO to 'Transfer to DSF' will be in the same location and cannot be selected until the substantial completion workflow is complete.

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		Tr's or Copy of Inspection Reports	Yes	Details.pdf					COMMENT	S	
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Role		Preceding Steps		Outcome
SPO, CPO	$\rightarrow$	Substantial package submitted.	$\rightarrow$	Transfer package is returned.

1. Go to 'Tasks' > Select the Substantial Package Task

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2. Select 'Return' > Enter 'Reason' > Select 'Continue'

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Role	Preceding Steps	Outcome
СРО	The GC, PO, and SPO have DocuSigned the request.	→ The substantial completion request is sent to the AEoR.

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

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2. Enter your PIN code > Select the 'Continue' button

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Role	Preceding Steps		Outcome
AEoR	The request has been approved by the CPO. If deficiencies are required, the deficiency list must be created and approved.	$\rightarrow$	The DM and CPO are required to DocuSign.

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

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

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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'

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

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Role	Preceding	Steps		Outcome
AEoR	The request approved	st has been by the CPO.	$\rightarrow$	A deficiencies list must be created and approved to continue with the substantial completion.

1. Go to 'Tasks' > Select the Substantial Completion Task > Select Deficiencies Required'

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				Project C	fficer	Fay External RE	QMT-CM3	REFERENC	ES	
Ċ	Getting Started			Chief Pro	oject Officer	Donna SCA PM-	CM-SPO			
				AEoR	,	Adam SCA In H	louse AEoR			
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2. Click the 'Continue' button

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Role	Preceding Steps	Outcome
AFoD	The request has been	The request is returned to the
ALOK	approved by the CPO.	PO.

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

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<b>P</b>	Tasks			Design Number	D017865	DATES & WORKFLOW
				LLW	108166 - EXTERIOR MASONRY	SIGNATURES
- <sup>39</sup>	Messages			General Contractor	Jordan External Contractor A	COMMENTS
				Project Officer	Fay External REQMT-CM3	REFERENCES
Ċ	Getting Started			Senior Project Officer	Noah SCA PM-CM-SPO	
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2. Enter the return reason > Select the 'Continue' button

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Role	Preceding Steps	Outcome
DO CM Eirm	AEoR has returned the request	The substantial completion is
	for revised documents.	sent to the AEoR.

1. Go to 'Tasks' > Select the Substantial Completion Task > In the References section, select 'Upload' to add a file

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2. Select 'Submit'



Role		Preceding Steps		Outcome
Order: AE DM > CPO	$\rightarrow$	Substantial Completion has been accepted by the AEoR.	$\rightarrow$	Substantial completion is DocuSigned. A task is sent to the CPO in CAMP to date the certificate of substantial completion.

- 1. Go to email account (external) > Select email titled 'Certificate of Substantial Completion'
- 2. Click 'Review Document' button in email
- 3. Click 'Continue' button > Select 'Signature' at the top-left > Select the location of your signature line on the document > Select desired signature details > Click 'Adopt and Sign' button
- 4. Select 'Date' at the top-left > Date the certificate at the appropriate location
- 5. Click 'Finish' button

#### **Accept Substantial Completion - CPO**

Role	Preceding Steps	Outcome
СРО	The request has been approved by the CPO.	The request is returned to the PO.

#### Step

1. Go to 'Tasks' > Select the Substantial Completion Task > In the Details section, enter the 'Date of Substantial Completion' > Click 'Submit'

