



Substantial Completion Training Guide

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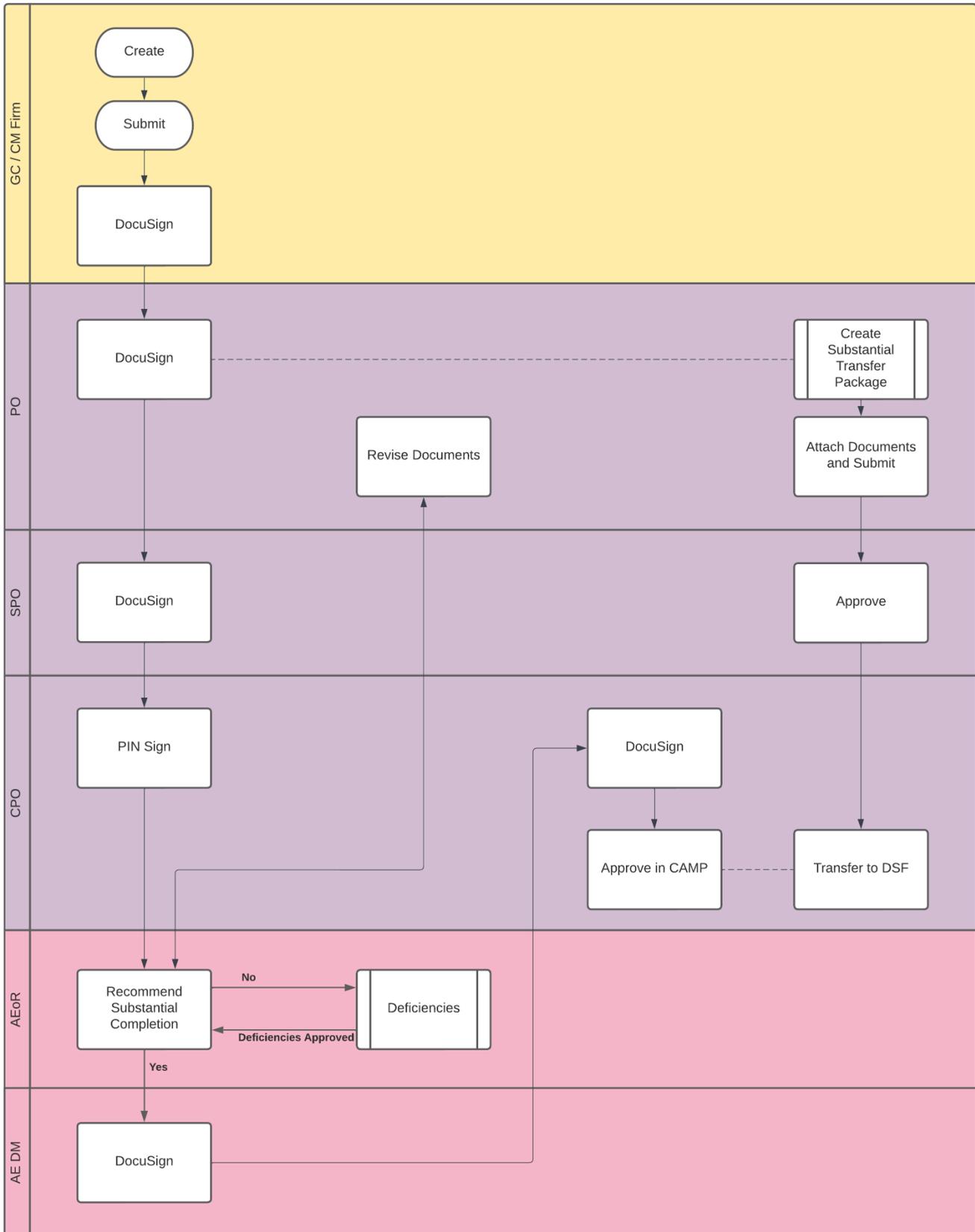
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About

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.

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.

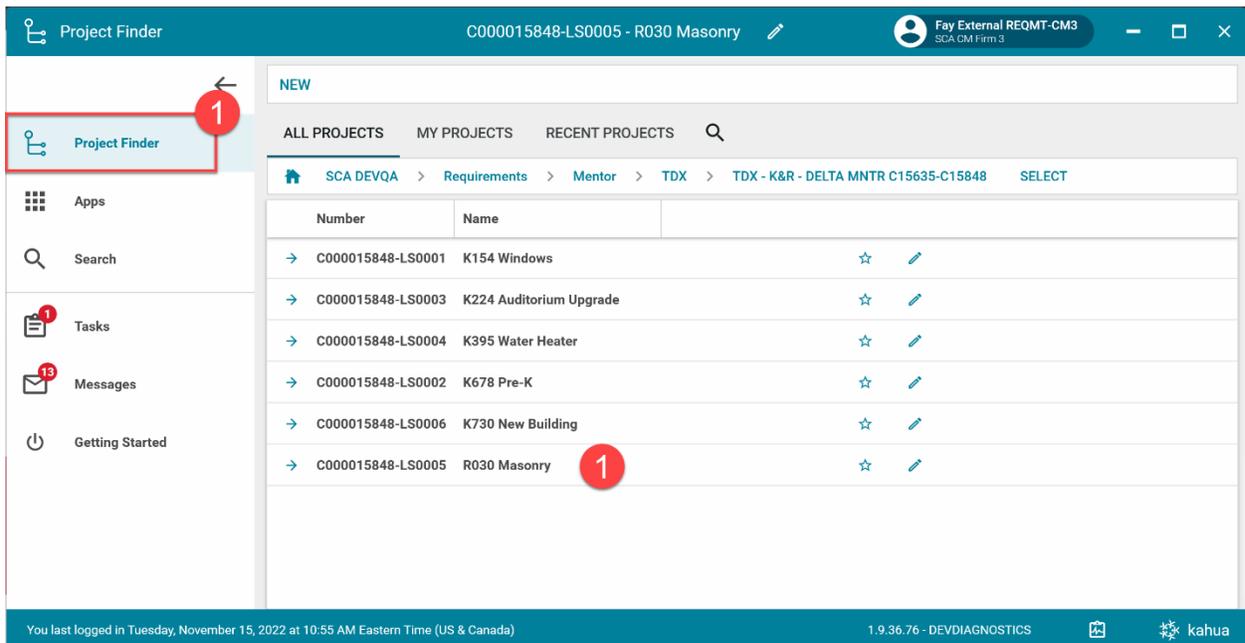
Step-by-Step Instructions

Create Substantial Completion

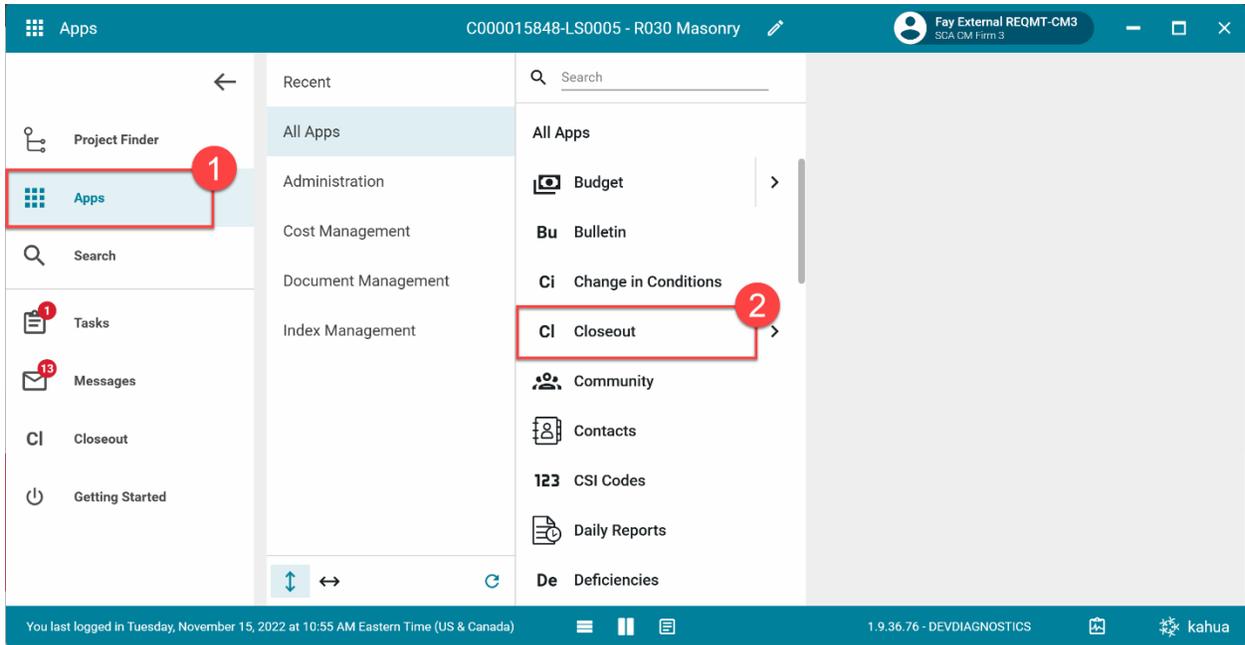
Role	Preceding Steps	Outcome
GC, CM Firm on behalf of GC	→ None.	→ A substantial completion request is created.

Steps

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

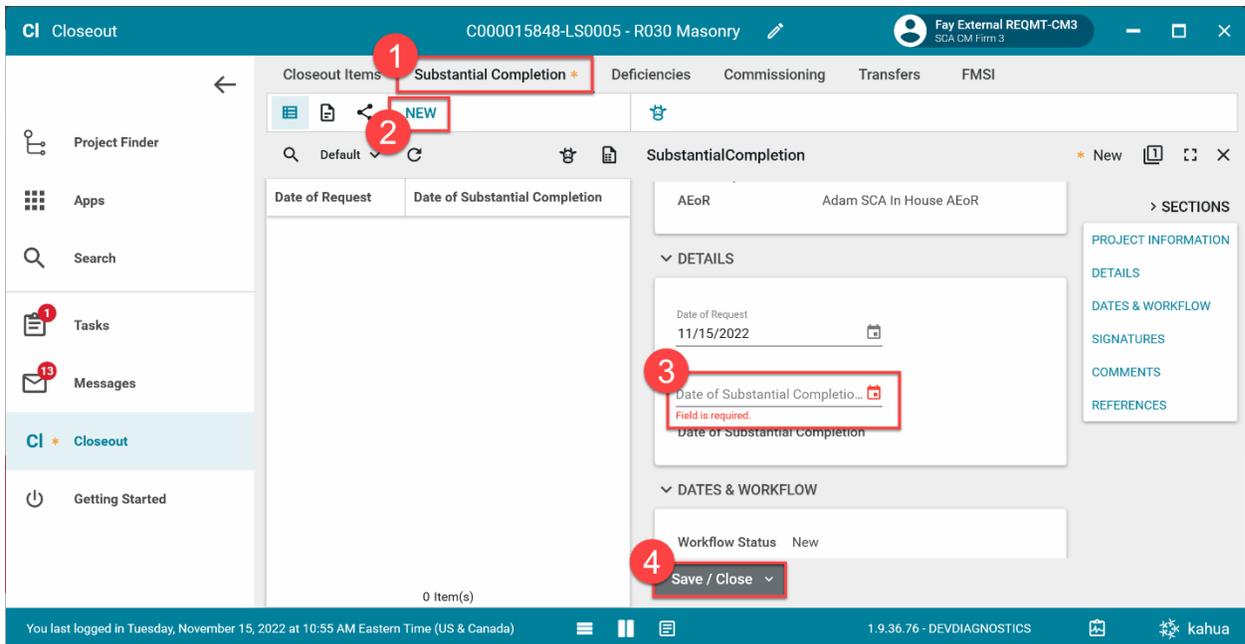


2. Go to 'Apps' > Select 'Closeout' App



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.

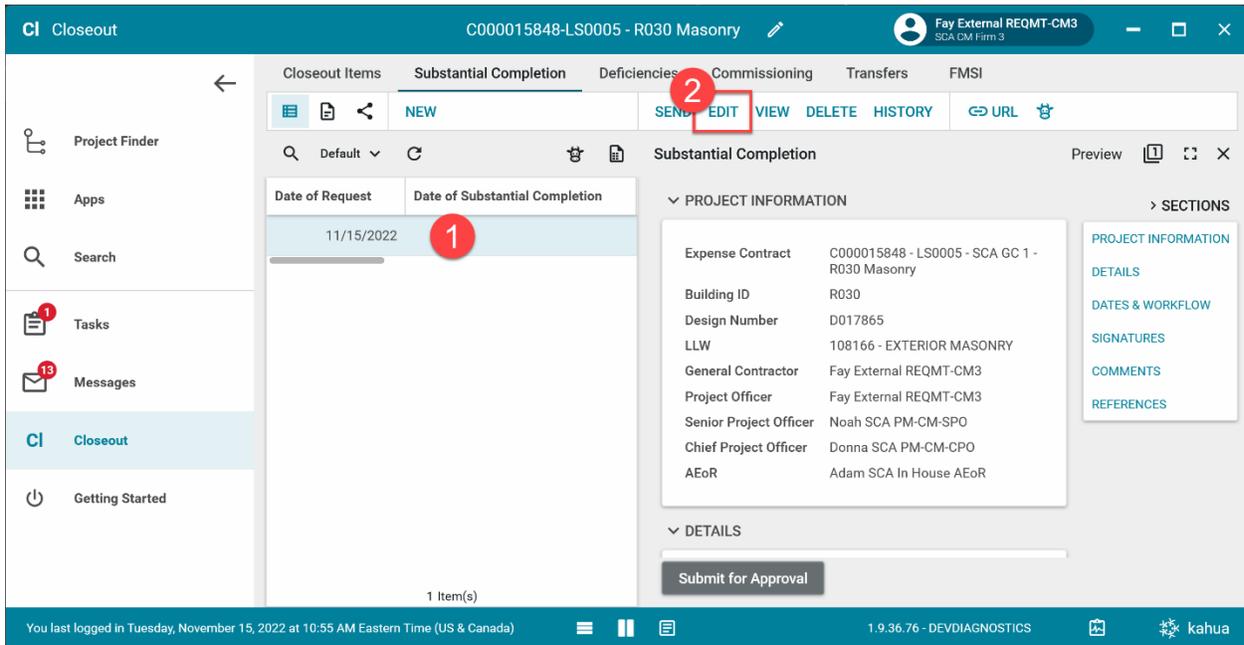


Update Substantial Completion Request

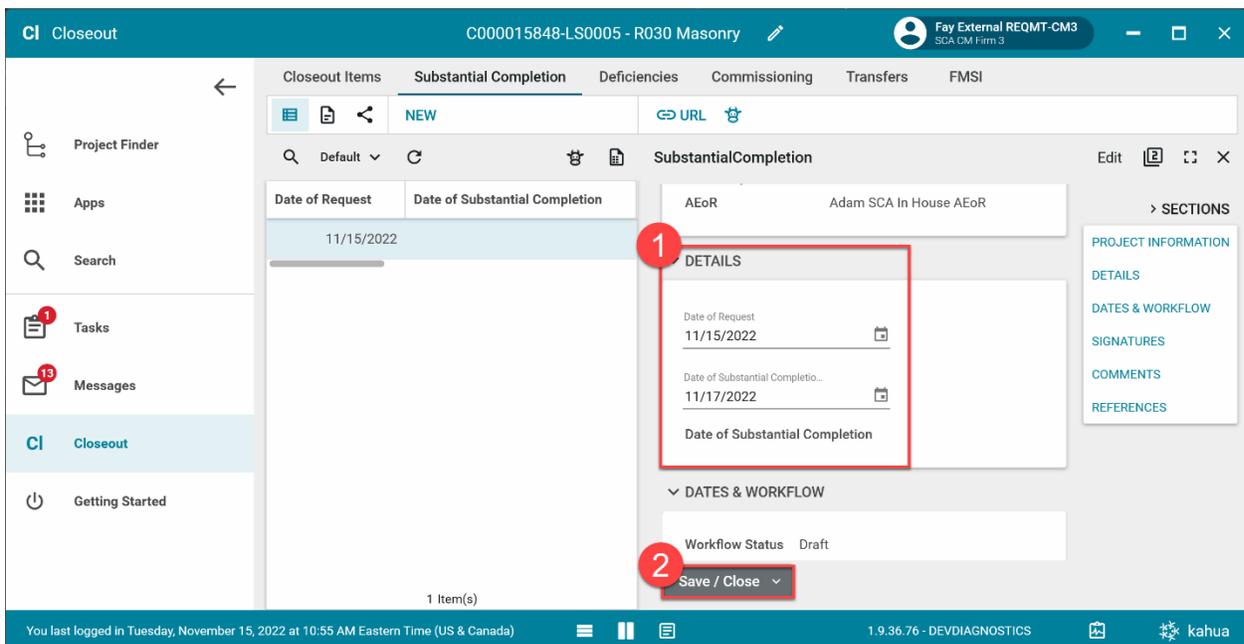


Steps

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



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

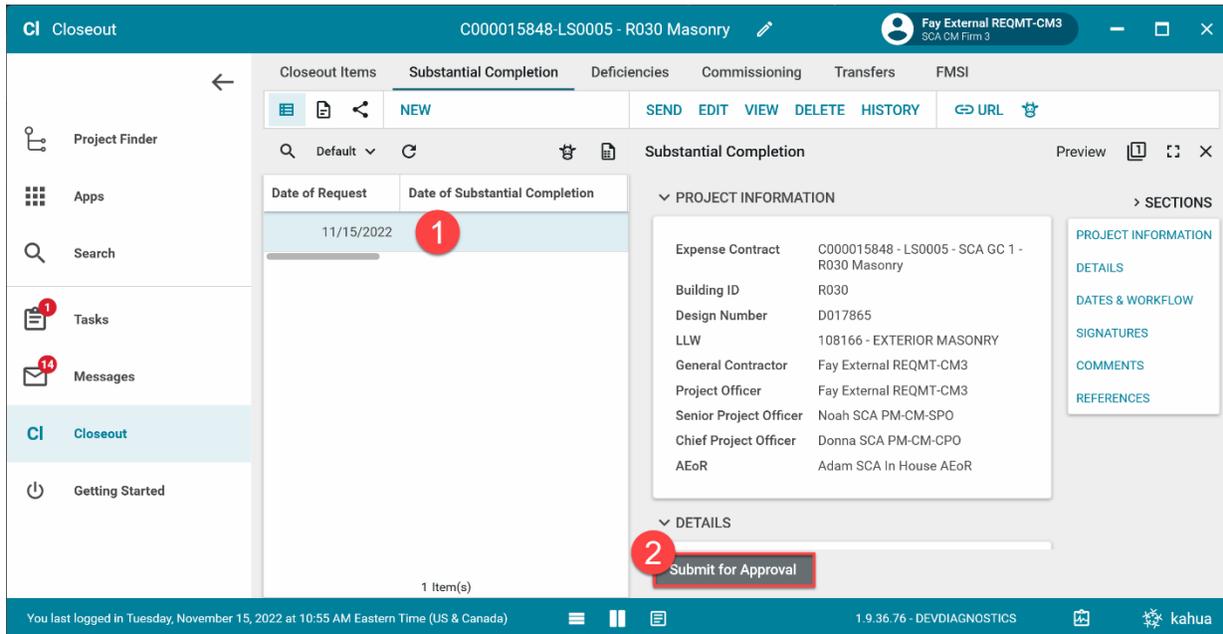


Submit Substantial Completion Request

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

Step

Select substantial completion request > Click 'Submit'



DocuSign Approve – GC, PO, SPO

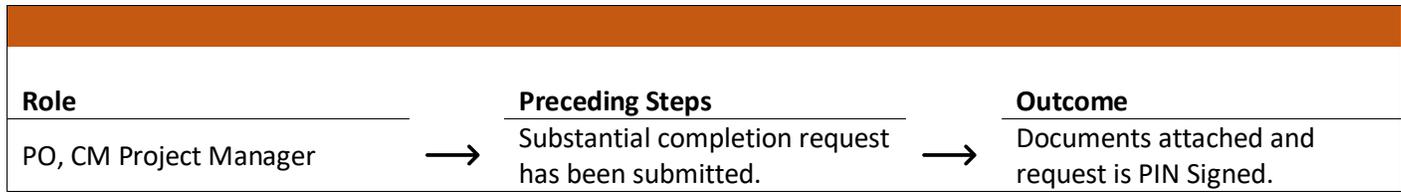
Role	Preceding Steps	Outcome
Order: GC > PO > SPO	→ Substantial Completion request has been submitted.	→ Substantial completion request is DocuSigned.

Steps

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

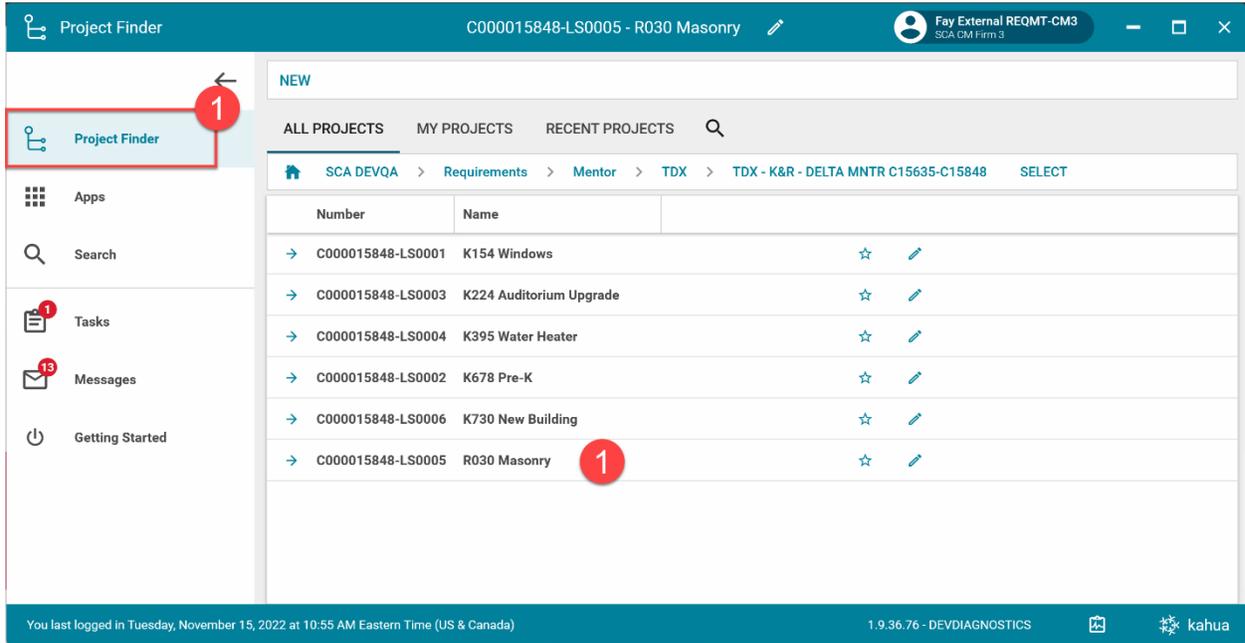
Attach Documents in Substantial Package

Create Substantial Package

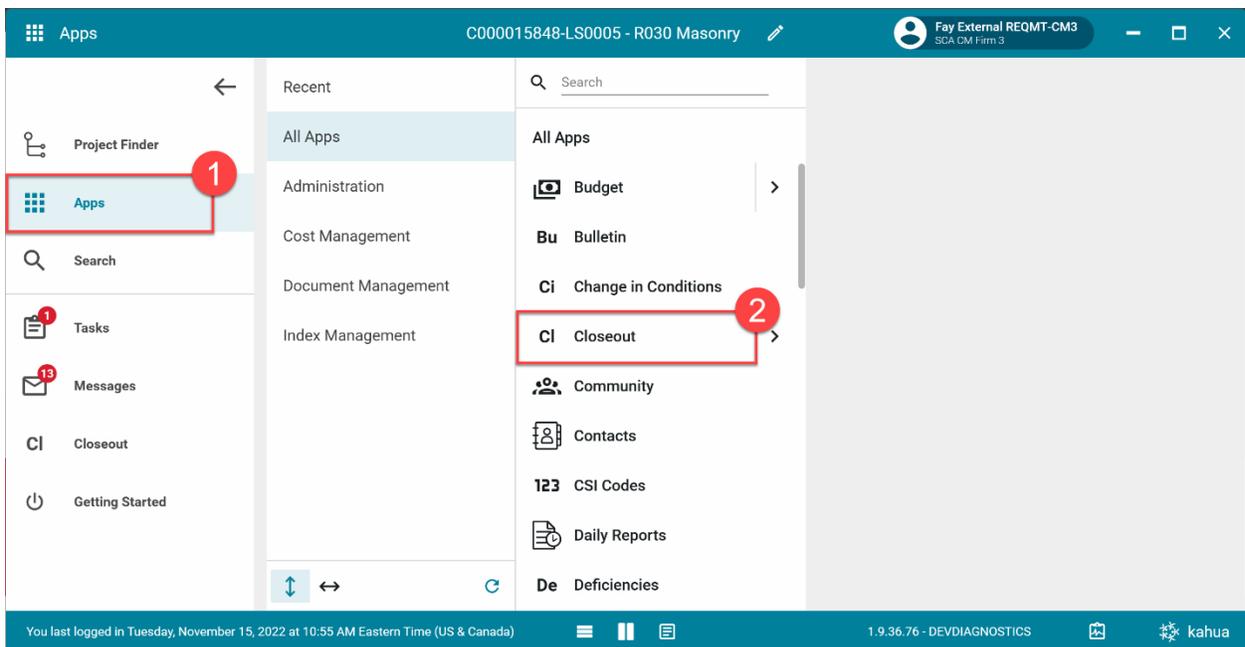


Steps

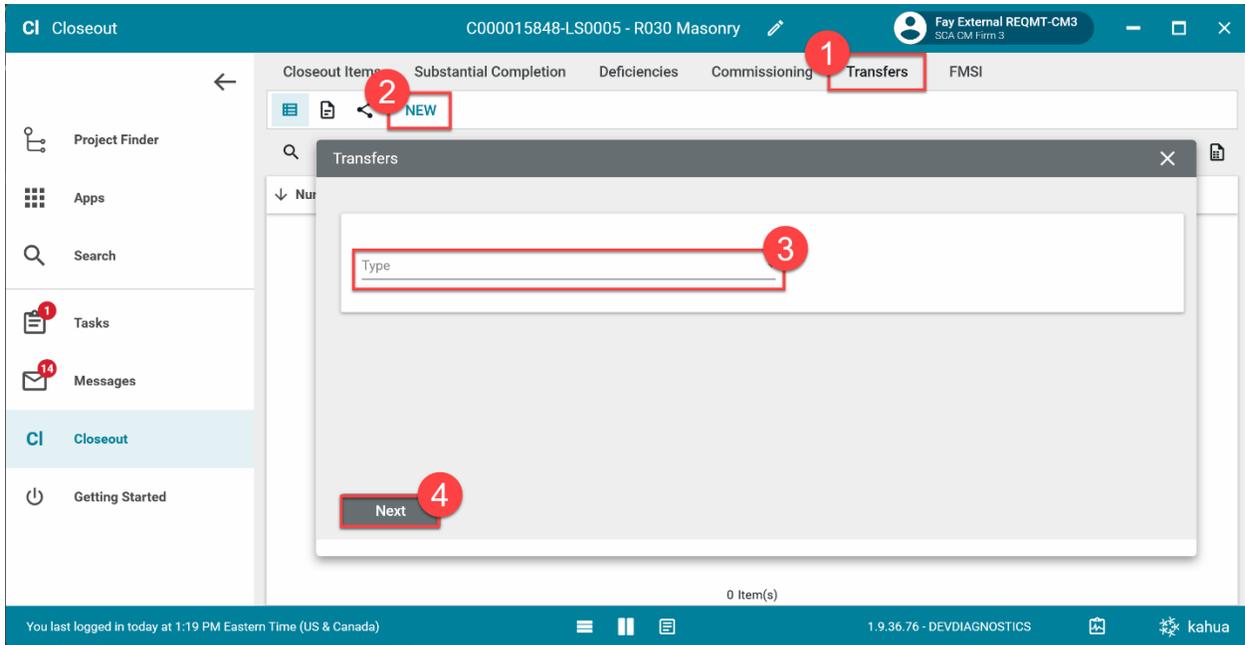
1. Go to 'Project Finder' > Select desired subproject



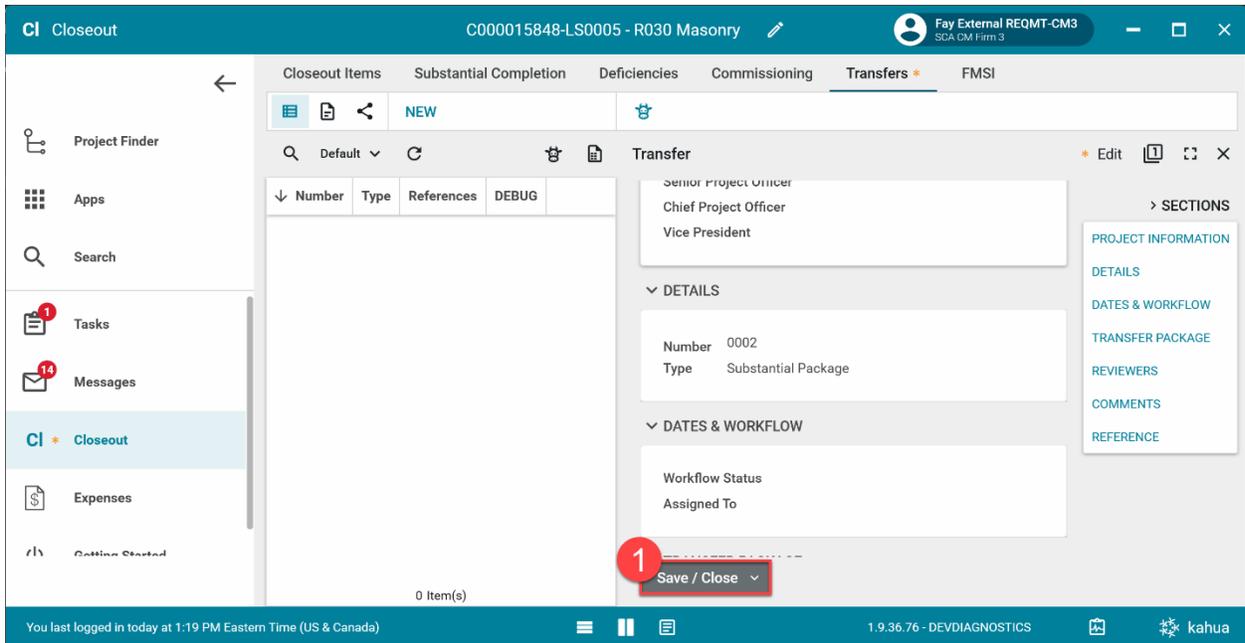
2. Go to 'Apps' > Select 'Closeout' App



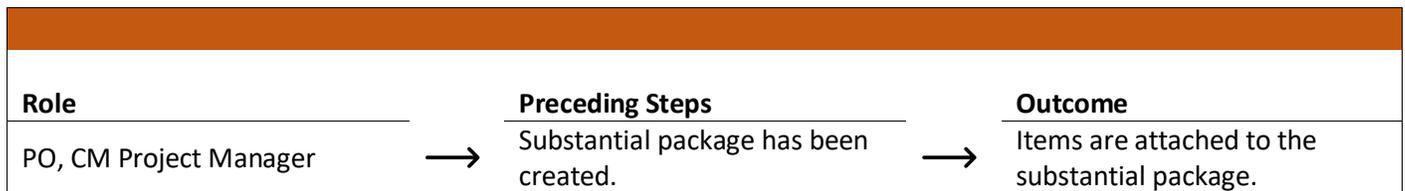
3. Select the 'Transfers' tab > Click 'New' > Select the 'Type' to be **Substantial Package** > Select 'Next'



4. Click 'Save/Close'

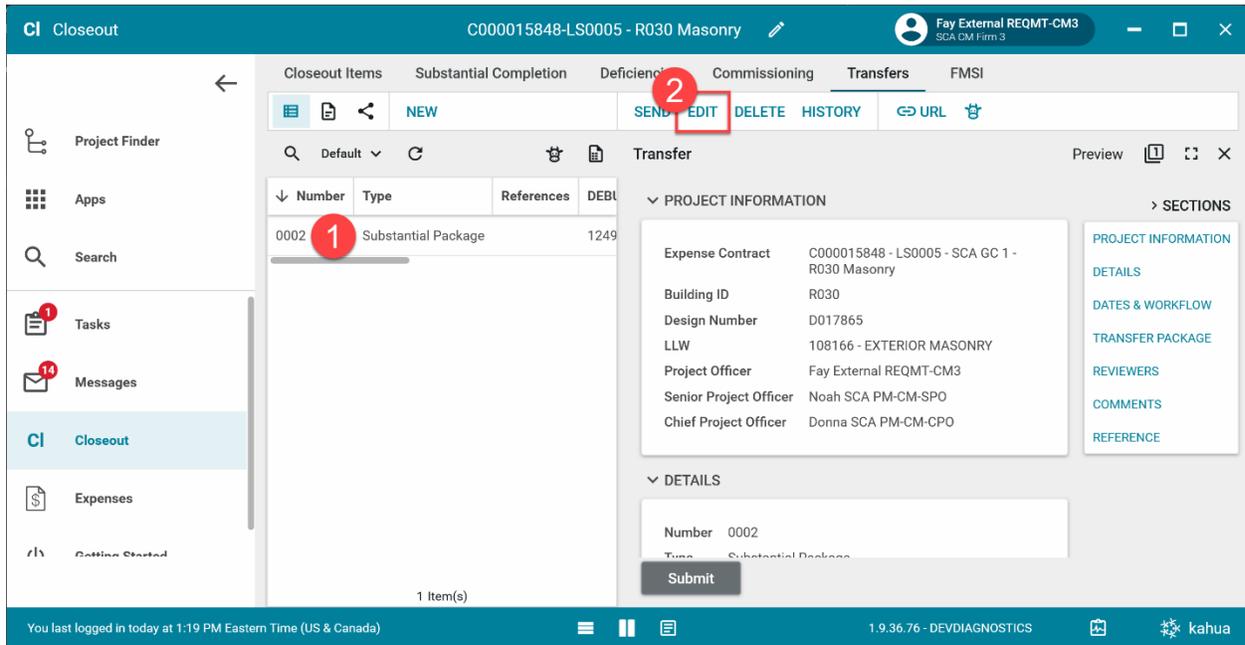


Attach Documents



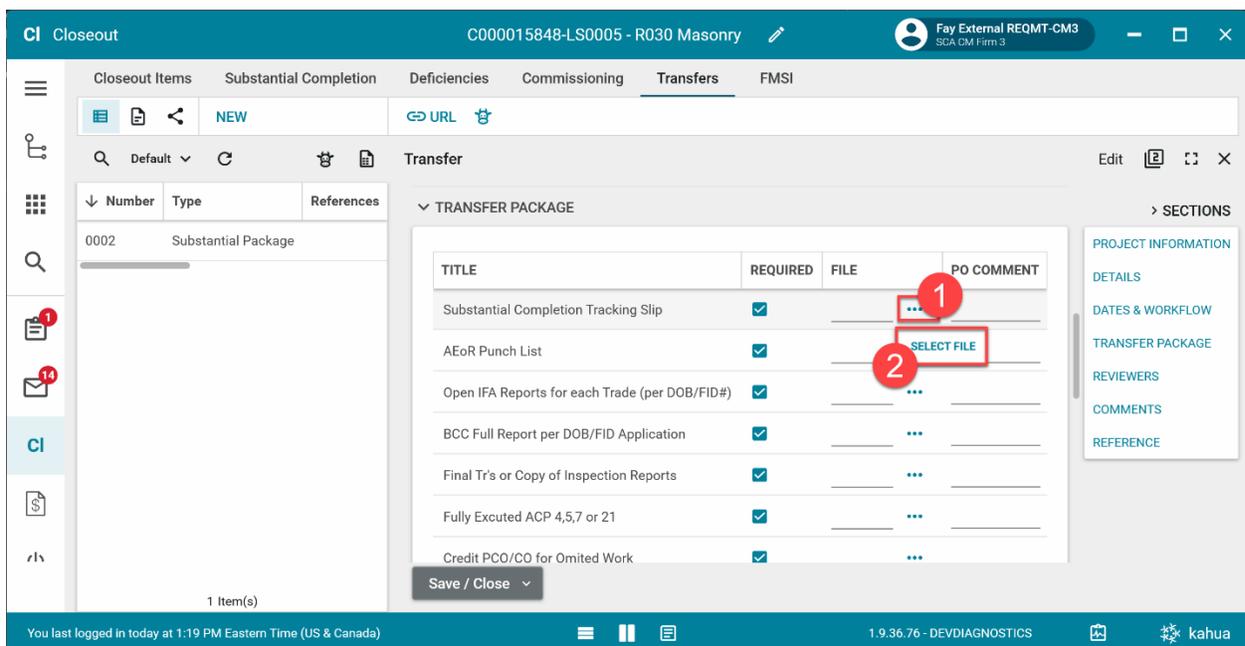
Steps

1. Select the substantial package > Select 'Edit'



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.



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

Closeout Items Substantial Completion Deficiencies Commissioning **Transfers *** FMSI

NEW URL

Transfer

Number	Type	Referer	TITLE	REQUIRED	FILE	PO COMMENT
0002	Substantial Package		Substantial Completion Tracking Slip	<input checked="" type="checkbox"/>	...	
			AEoR Punch List	<input checked="" type="checkbox"/>	...	
			Open IFA Reports for each Trade (per DOB/FID#)	<input checked="" type="checkbox"/>	...	
			BCC Full Report per DOB/FID Application	<input type="checkbox"/>	...	Reason why file is not required
			Final Tr's or Copy of Inspection Reports	<input checked="" type="checkbox"/>	...	
			Fully Excuted ACP 4,5,7 or 21	<input checked="" type="checkbox"/>	...	
			Credit PCO/CO for Omitted Work	<input checked="" type="checkbox"/>	...	

Save / Close

You last logged in today at 1:19 PM Eastern Time (US & Canada) 1.9.36.76 - DEVDIAGNOSTICS

4. Select 'Save/Close'

Closeout Items Substantial Completion Deficiencies Commissioning **Transfers *** FMSI

NEW URL

Transfer

Workflow Status Active
Assigned To

Number	Type	Referer	TITLE	REQUIRED	FILE	PO COMMENT
0002	Substantial Package		Substantial Completion Tracking Slip	<input checked="" type="checkbox"/>	Details.pdf	
			AEoR Punch List	<input checked="" type="checkbox"/>	Summary.pdf	
			Open IFA Reports for each Trade (per DOB/FID#)	<input checked="" type="checkbox"/>	822.Topic2.pdf	
			BCC Full Report per DOB/FID Application	<input type="checkbox"/>	...	Reason why file is not requi
			Final Tr's or C... Inspection	<input type="checkbox"/>	...	

Save / Close

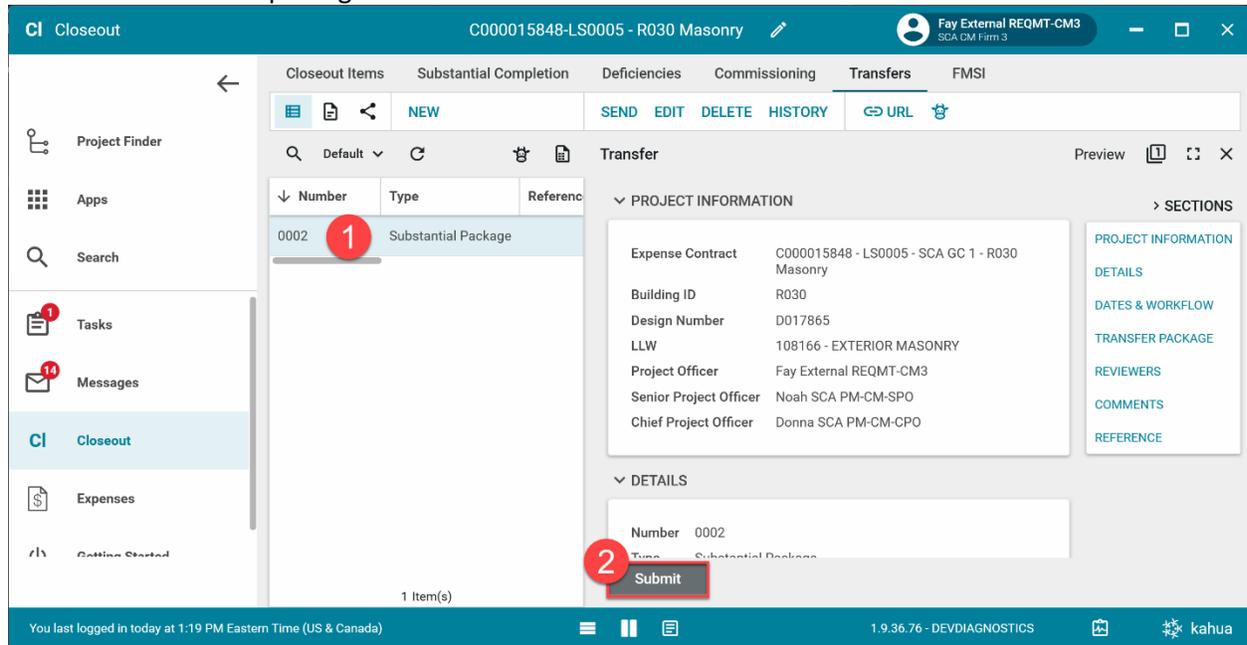
You last logged in today at 1:19 PM Eastern Time (US & Canada) 1.9.36.76 - DEVDIAGNOSTICS

Submit Substantial Package

Role	Preceding Steps	Outcome
PO/CM Project Manager	All files have been uploaded or marked as not required.	Transfer package is submitted to the SPO and CPO.

Step

Select the substantial package > Select 'Submit'

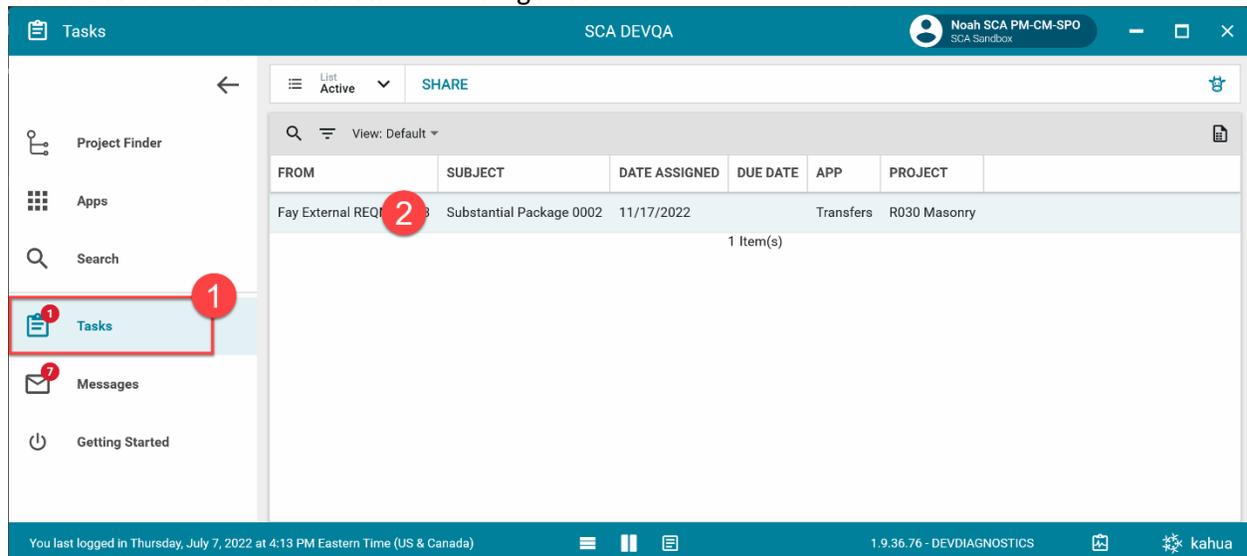


Approve Substantial Package – SPO, CPO

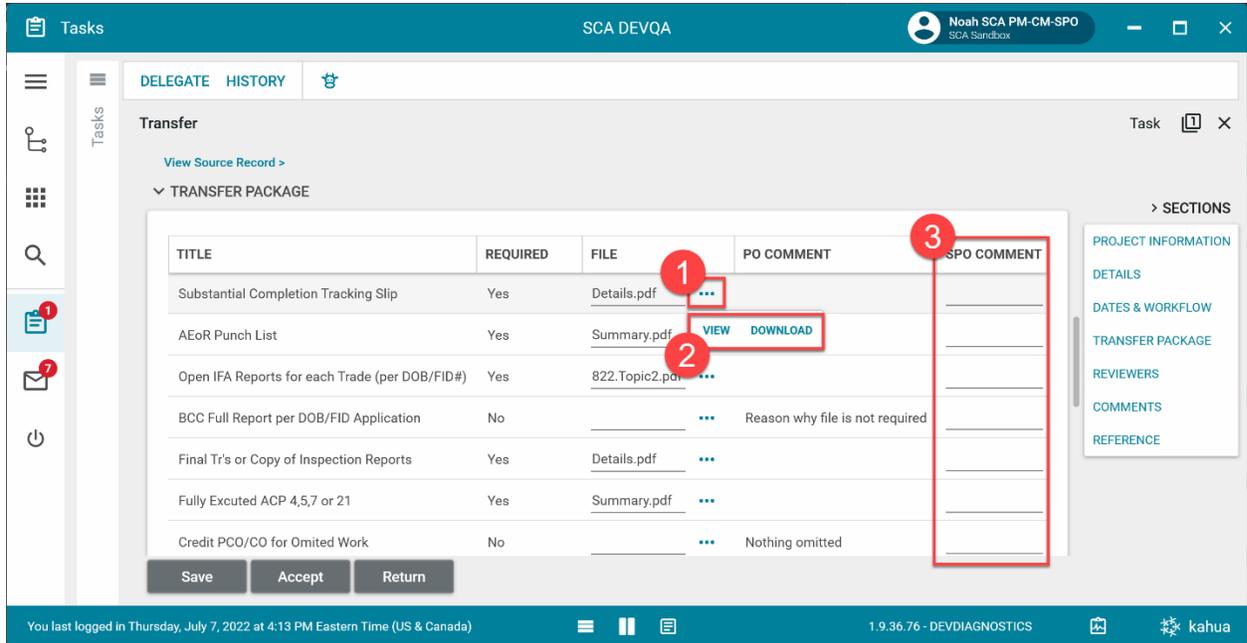
Role	Preceding Steps	Outcome
Order: SPO > CPO	Substantial package submitted.	Transfer package is approved.

Steps

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

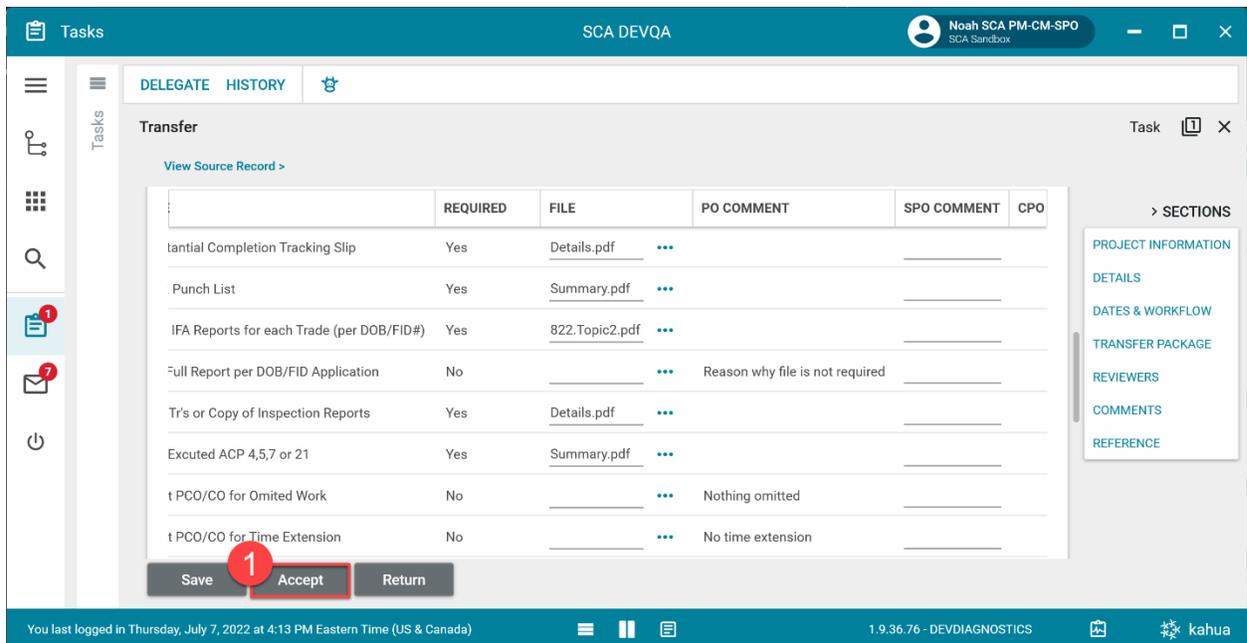


- In the transfer package section, select '...' > Click 'View' or 'Download' to review the file > *Optional: Add a comment in the 'SPO Comment' or 'CPO Comment' column*



- 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.

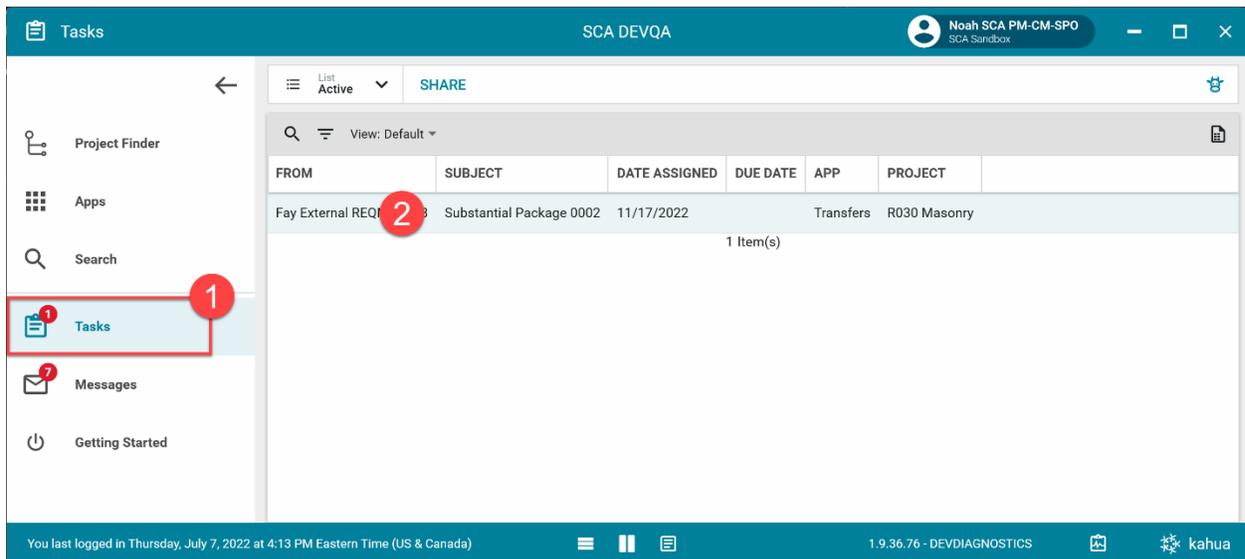


Return Substantial Package – SPO, CPO

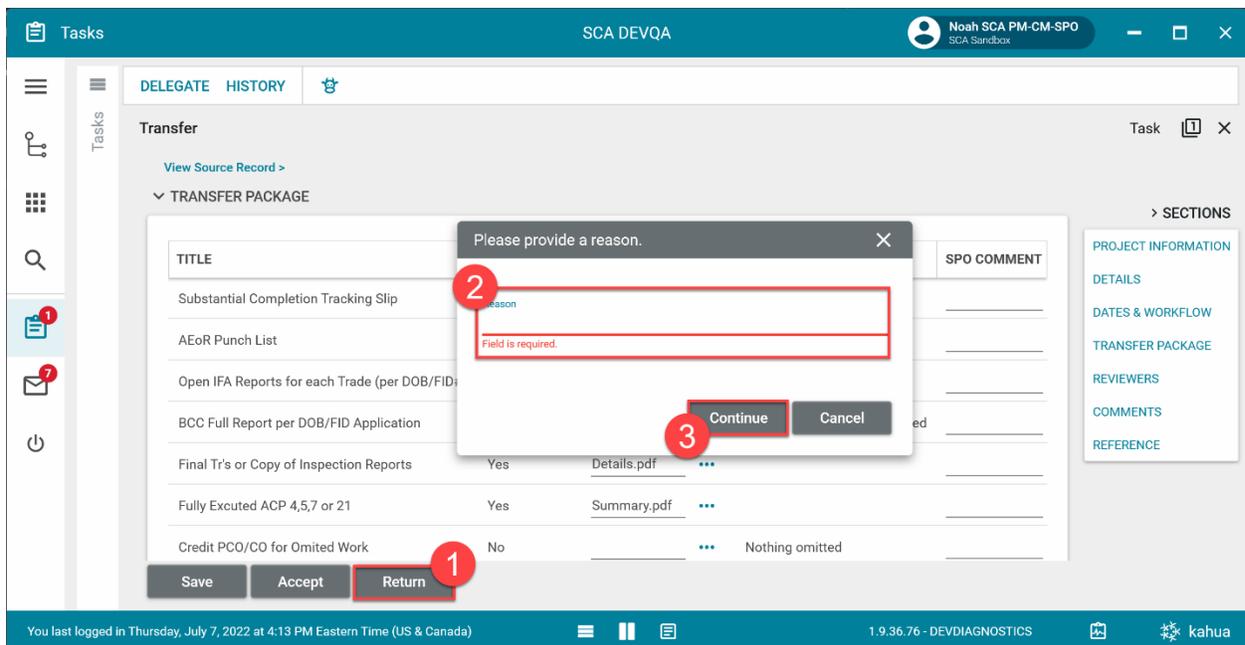
Role	Preceding Steps	Outcome
SPO, CPO	→ Substantial package submitted.	→ Transfer package is returned.

Steps

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



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

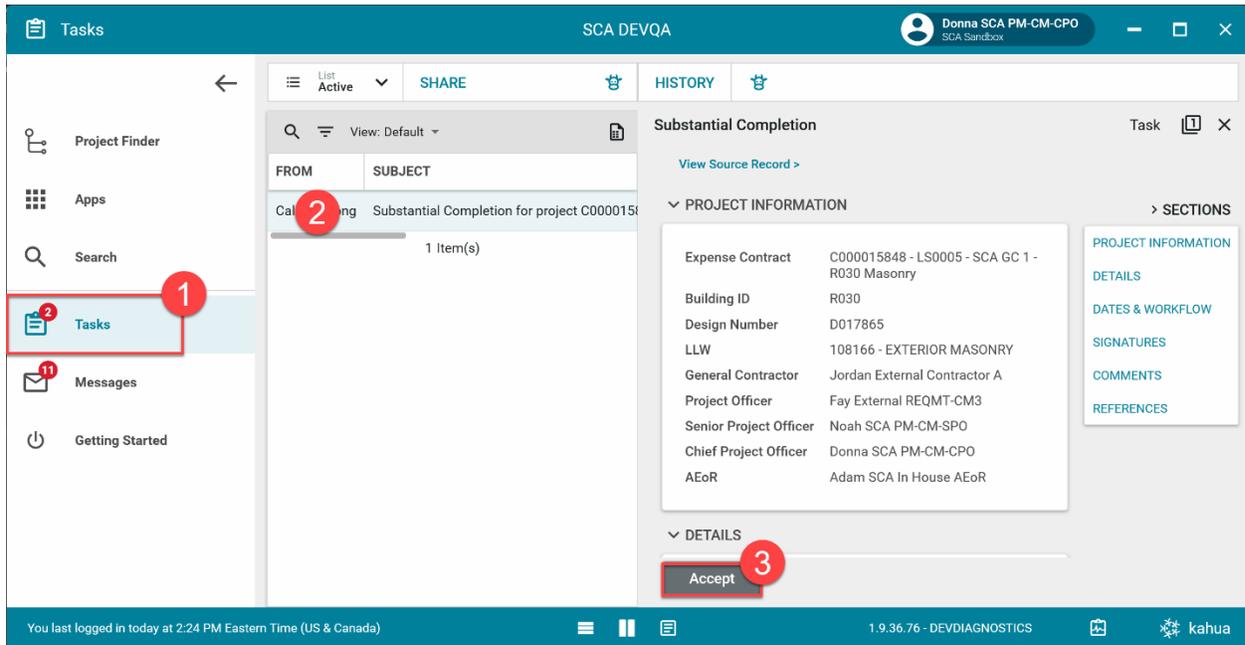


PIN Sign - CPO

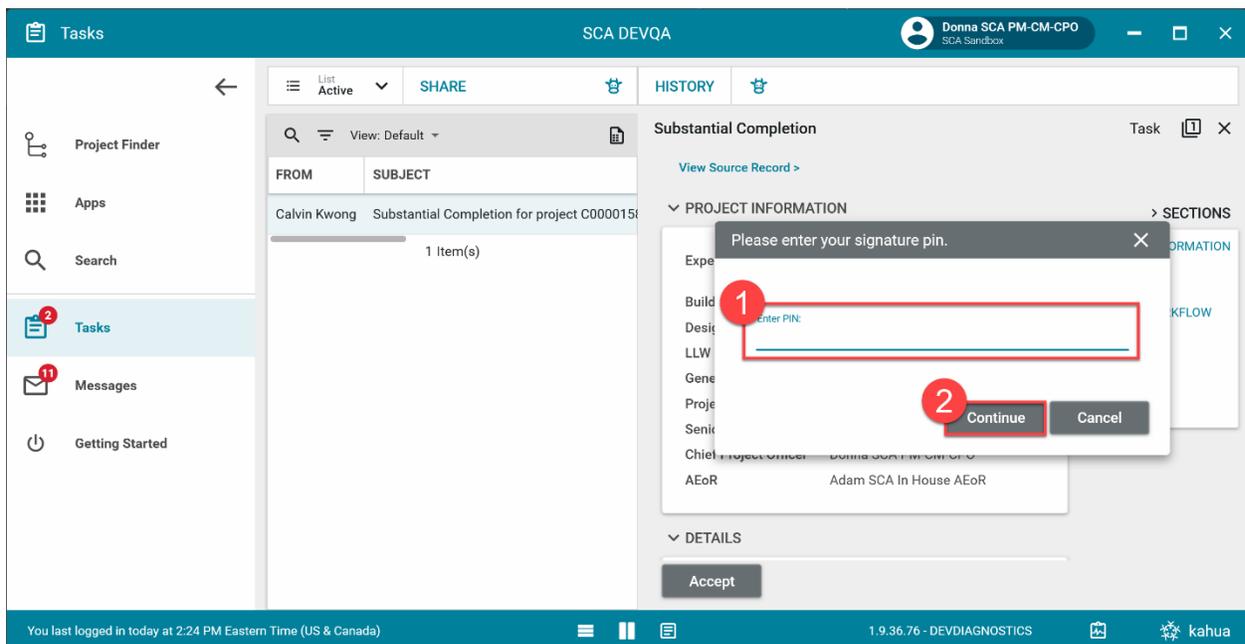
Role	Preceding Steps	Outcome
CPO	→ The GC, PO, and SPO have DocuSigned the request.	→ The substantial completion request is sent to the AEoR.

Steps

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



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



Recommend Substantial Completion - AEoR

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.	→ The DM and CPO are required to DocuSign.

Steps

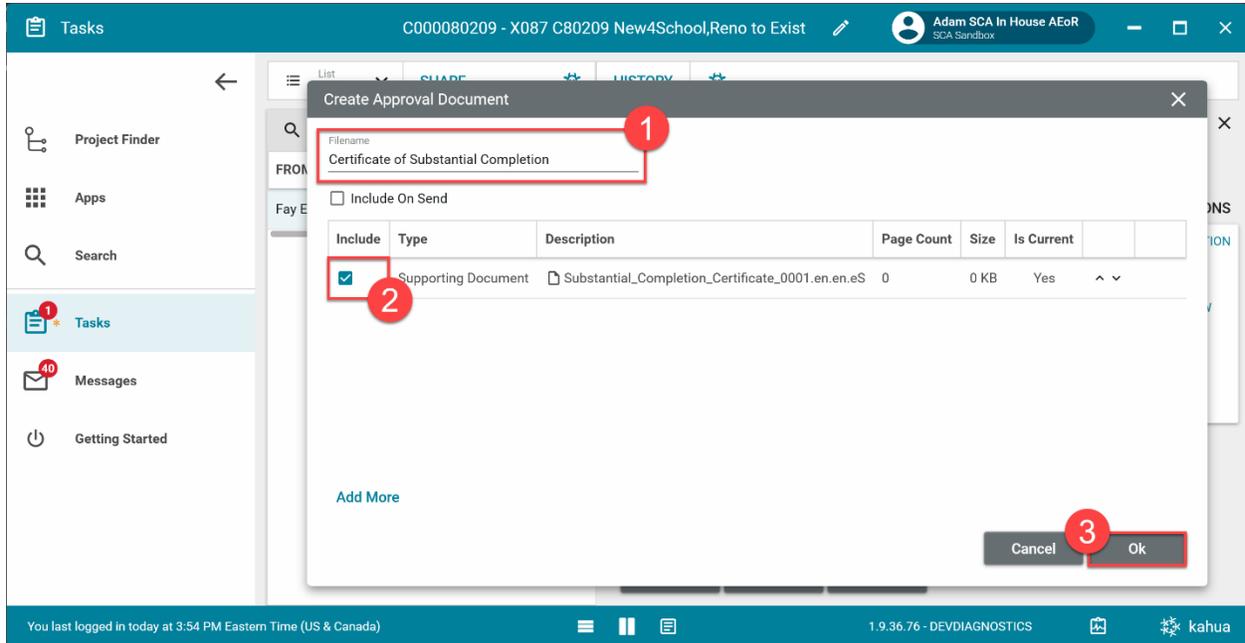
1. Go to 'Tasks' > Select the Substantial Completion Task

The screenshot shows the 'Tasks' interface for a user named Adam SCA In House AEoR. The left sidebar has a 'Tasks' menu item highlighted with a red box and a '1' in a red circle. The main content area shows a list of tasks with one item selected: 'Donna SCA CPO Substantial Completion for' (2). The task details are displayed on the right, including project information and a 'REFERENCES' section.

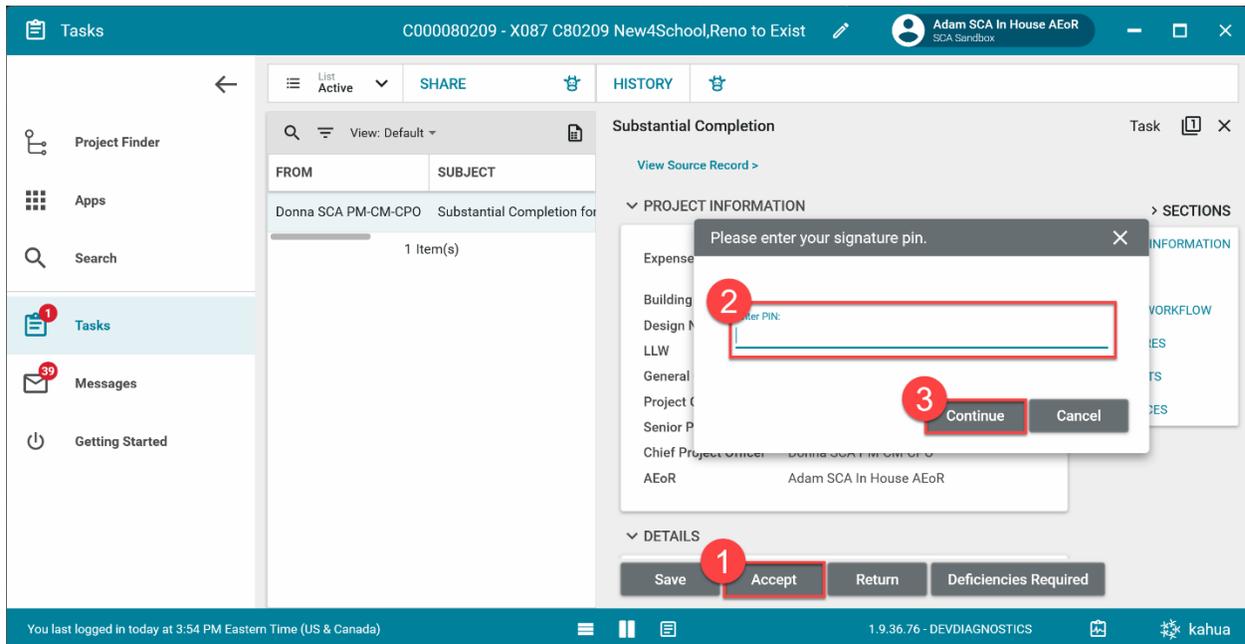
2. In the References section, select '...' > Select 'Add Approval Doc'

The screenshot shows the 'References' section of the 'Substantial Completion' task. The 'REFERENCES' section is expanded, showing a list of items. A red box highlights the '...' menu (1) and the 'ADD APPROVAL DOC' option (2). The interface also shows a 'REFERENCES' section with a list of items and a 'REFERENCES' section with a list of items.

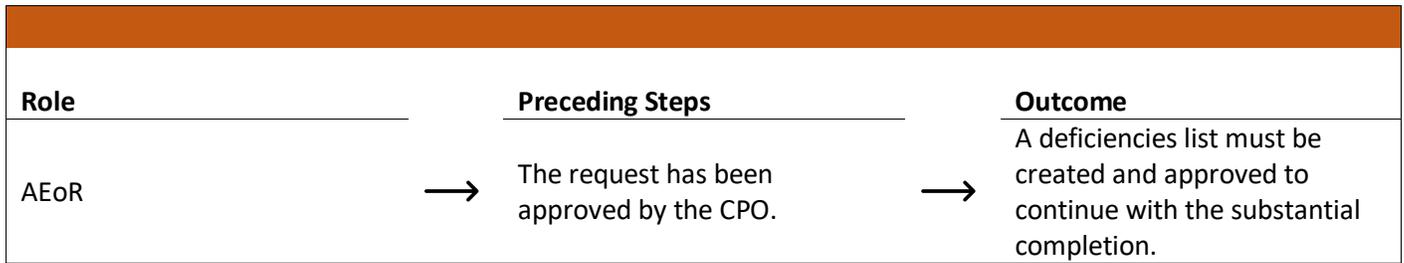
3. Enter a 'Filename' > Select the 'Include' checkbox for the substantial completion certificate that was signed by the GC, PO, and SPO (the description will end in '.eSigned.pdf') > Click 'Ok'



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

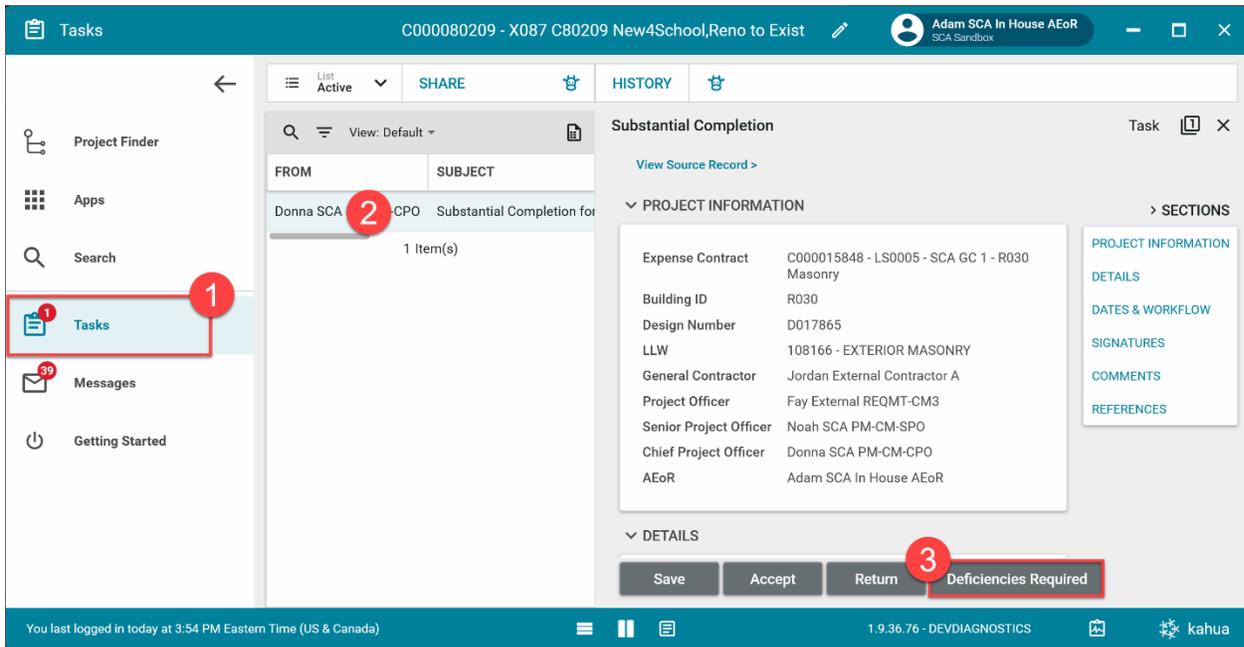


Specify Deficiencies Required - AEoR

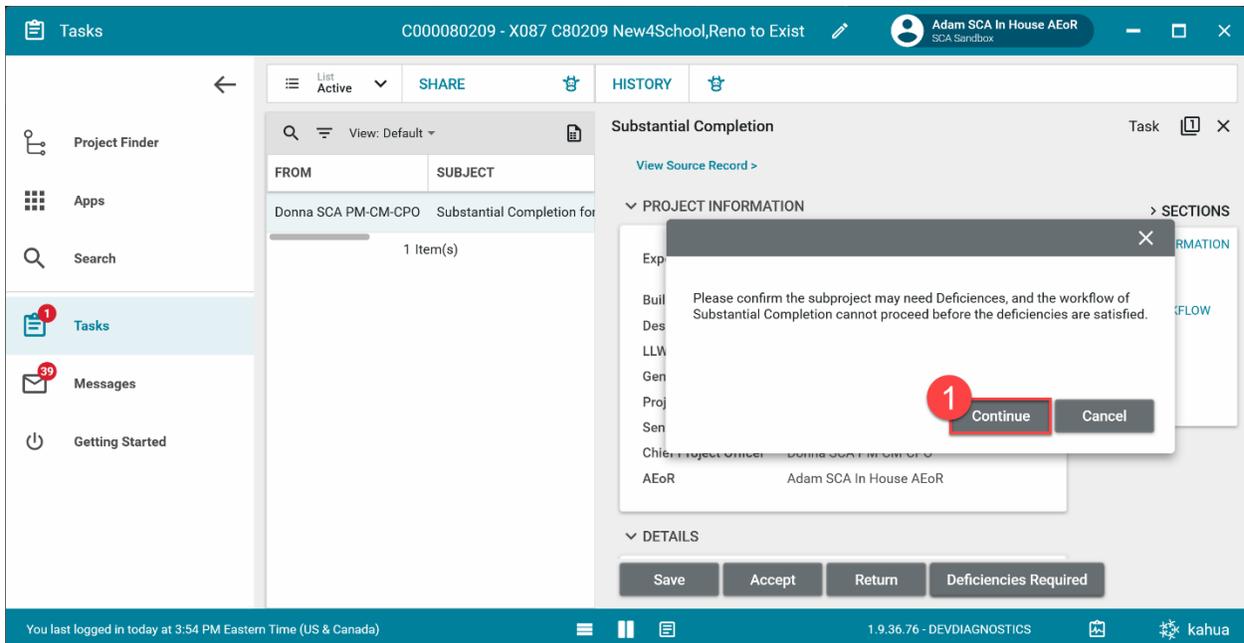


Steps

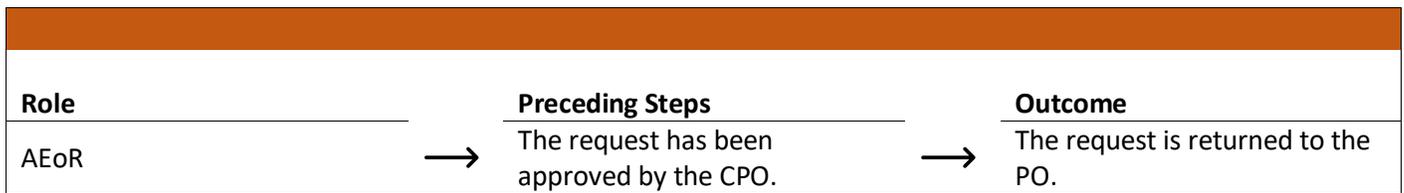
1. Go to 'Tasks' > Select the Substantial Completion Task > Select Deficiencies Required'



2. Click the 'Continue' button

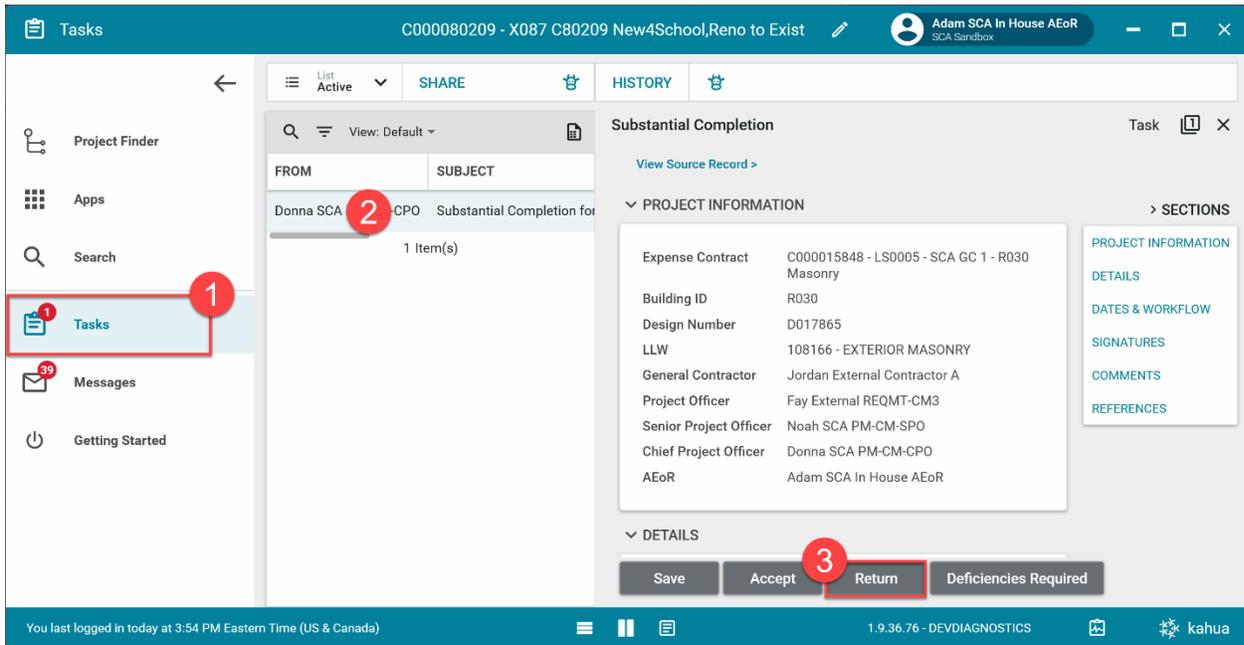


Return to Project Officer - AEoR

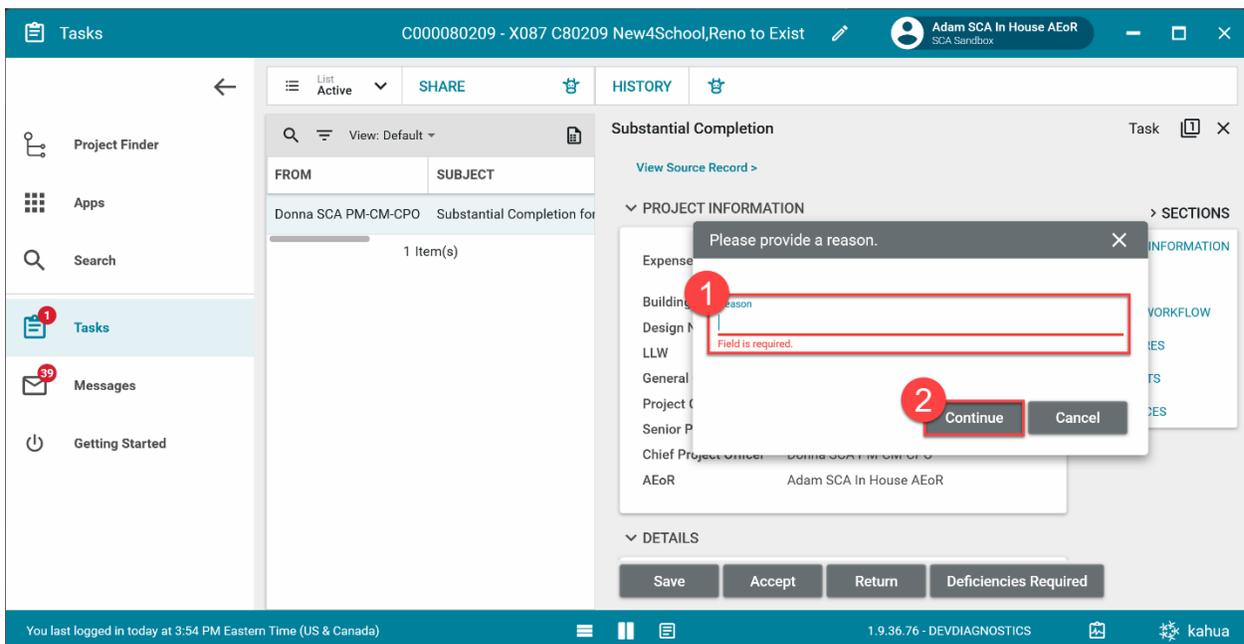


Steps

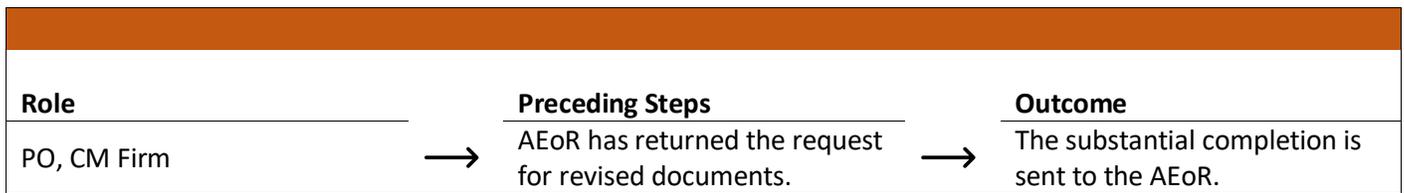
1. Go to 'Tasks' > Select the Substantial Completion Task > Select 'Return'



2. Enter the return reason > Select the 'Continue' button

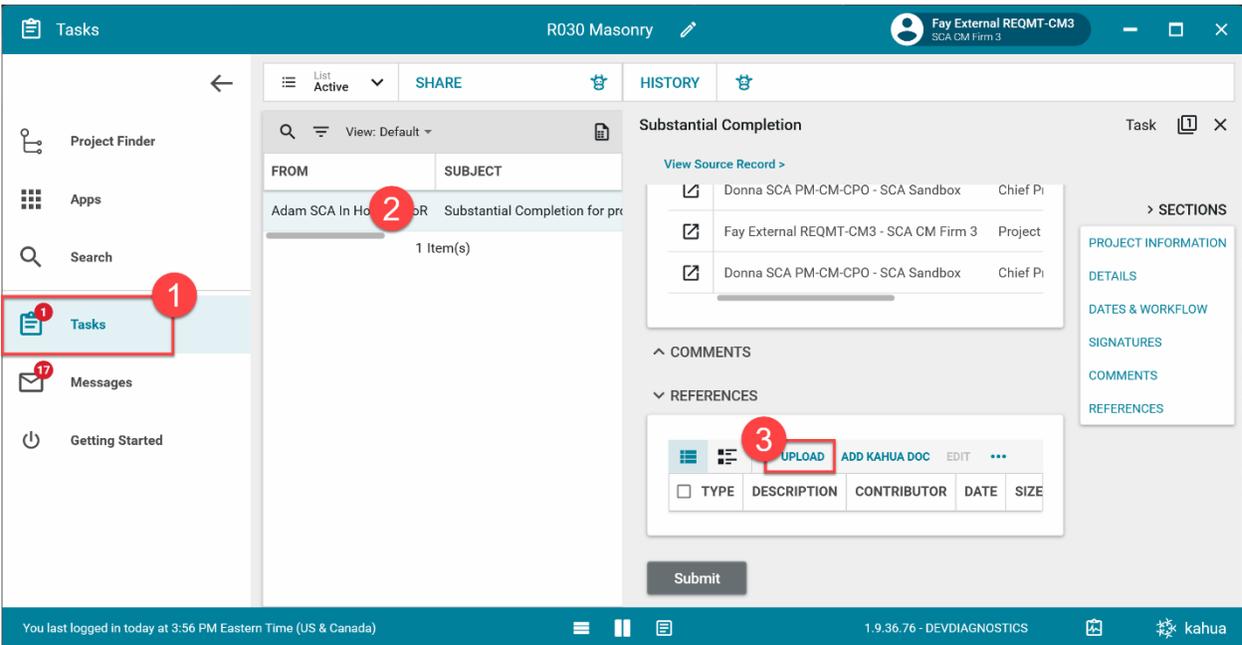


Resubmit to AEoR - PO

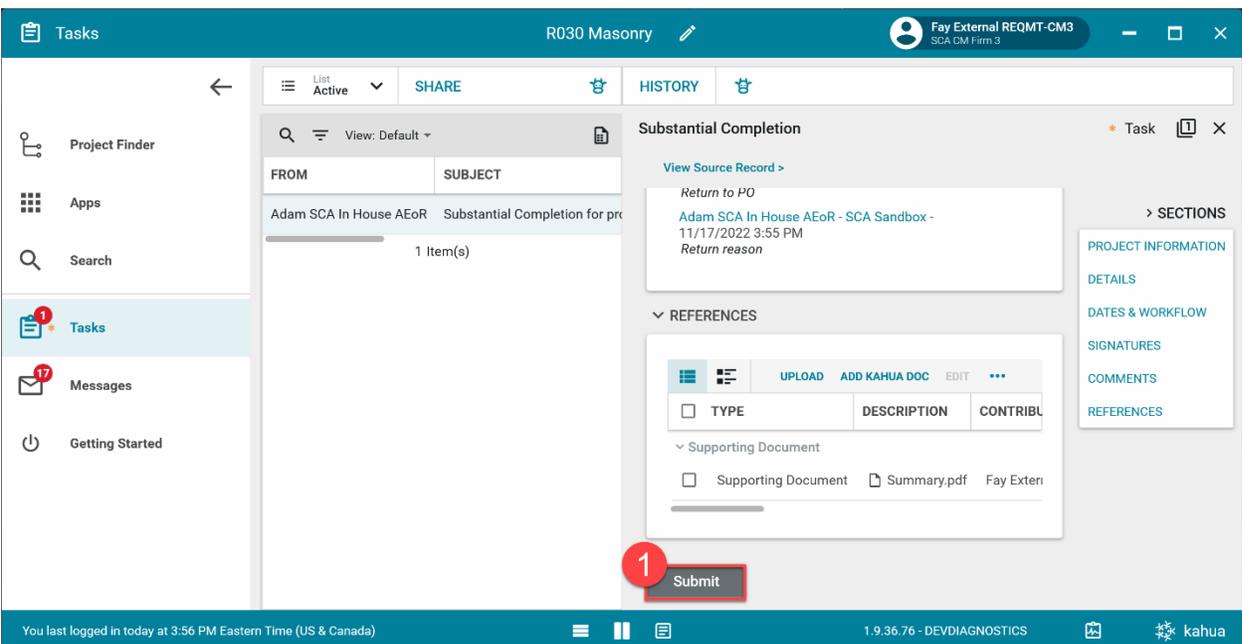


Steps

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



2. Select 'Submit'



DocuSign Approve – AE DM, CPO

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

Steps

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
CPO	→ 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'

The screenshot displays the SCA DEVQA interface. On the left sidebar, the 'Tasks' menu item is highlighted with a red box and a red circle labeled '1'. The main content area shows a list of tasks, with 'Substantial Completion for project C000015' selected and highlighted with a red circle labeled '2'. Below the list, the details for this task are shown. In the 'DETAILS' section, the 'Date of Substantial Completion' field is highlighted with a red box and a red circle labeled '3', and it contains the text 'Field is required.' Below this, the 'DATES & WORKFLOW' section shows 'Workflow Status' as 'Pending CPO Review' and 'Assigned To' as 'Donna SCA PM-CM-CPO - SCA Sandbox'. At the bottom of the details section, the 'Submit' button is highlighted with a red box and a red circle labeled '4'. A large red circle labeled '5' is placed in the main content area of the task details. The top of the interface shows the user's name 'Donna SCA PM-CM-CPO' and the system version '1.9.36.76 - DEVDIAGNOSTICS'.