

ELECTRONIC SUBMITTAL REVIEW PROCESS GUIDELINE (SHAREPOINT)

The following describes a step-by-step process to be followed to ensure a timely review of electronic submittals.

Responsible Party	Steps and Description of Tasks	Time Schedule
Contractor	<ol style="list-style-type: none"> 1. Prepare submittal package. <ol style="list-style-type: none"> a. Complete the Contractor portion (indicated in white) on Form CM-SPE. b. Attach all related documents in PDF format. 2. SharePoint website: <ol style="list-style-type: none"> a. Upload completed Submittal. <ol style="list-style-type: none"> i. Click the "Submittal Action" link. ii. Browse to Form CM-SPE. b. "Submittal No." – Add or append. c. "Current Responsible Party" = "CMR". d. Add comments as needed. e. An e-mail notification will be automatically sent to the CMR. 	N/A
CMR	<p>ACTION</p> <ol style="list-style-type: none"> 1. Review submittal for completeness. 2. If incomplete: <ol style="list-style-type: none"> a. SharePoint website: <ol style="list-style-type: none"> i. Does not require a new submittal number. ii. Change "Status" (drop-down menu) to "Incomplete-Resubmit". iii. Change "Current Responsible Party" to "Contractor". iv. Add notification comments describing reasons why it was returned. v. An e-mail notification will be automatically sent to the Contractor. 3. If complete: <ol style="list-style-type: none"> a. Submittal Tracking Log: <ol style="list-style-type: none"> i. Enter date in the "Date Accepted by CMR" field. ii. Enter date in the "To A/E" field ("Action" section). b. SharePoint website: <ol style="list-style-type: none"> i. Change "Current Responsible Party" to "A/E". ii. Add comments as needed. iii. An e-mail notification will be automatically sent to the A/E. <p>INFORMATIONAL</p> <ol style="list-style-type: none"> 1. Review submittal for completeness. 2. Generate comments as needed and attach in PDF format. 3. Form CM-SPE: <ol style="list-style-type: none"> a. Indicate the recommended action (accept or reject). b. Electronically sign in the "Recommended by" field. c. Add title and date below "Recommended by" field. 4. Submittal Tracking Log: <ol style="list-style-type: none"> a. Enter date in the "Date Accepted by CMR" field. 5. SharePoint website: <ol style="list-style-type: none"> a. Change "Current Responsible Party" to "Contractor". b. Add notification comments as needed. c. An e-mail notification will be automatically set to the Contractor. 6. Notify COR of recommended action (accepted or rejected). 	Max. 3 days

Responsible Party	Steps and Description of Tasks	Time Schedule
A/E	<ol style="list-style-type: none"> 1. Review submittal. 2. Generate comments as needed and attach in PDF format. 3. Form CM-SPE: <ol style="list-style-type: none"> a. Indicate the recommended action. b. Electronically sign in the "Recommended by" field. c. Add title and date below "Recommended by" field. 4. Submittal Tracking Log: <ol style="list-style-type: none"> a. Enter date in the "Signed by A/E" field ("Action" section). 5. SharePoint website: <ol style="list-style-type: none"> a. Upload updated CM-SPE. b. Upload comments. c. Upload Submittal Tracking Log. d. Change "Current Responsible Party" to "COR". e. Add comments as needed. f. An e-mail notification will be automatically sent to the COR. 	Max. 12 days
COR	<ol style="list-style-type: none"> 1. Review submittal, A/E comments, and action. 2. Generate comments as needed and attach in PDF format. 3. Form CM-SPE: <ol style="list-style-type: none"> a. Electronically sign in the "Action by" field. b. Add title and date below the "Action by" field. 4. Submittal Tracking Log: <ol style="list-style-type: none"> a. Enter date in the "Signed by COR" field ("Action" section). 5. SharePoint website: <ol style="list-style-type: none"> a. Change "Current Responsible Party" to "CMR". b. Add notification comments as needed. c. An e-mail will be automatically sent to the CMR. 	Max. 12 days
CMR	<ol style="list-style-type: none"> 1. Submittal Tracking Log: <ol style="list-style-type: none"> a. Enter date in the "Processed by CMR" field (Action section). b. Enter date in the "Date Sent to Contractor" field. 2. SharePoint website: <ol style="list-style-type: none"> a. Change "Responsible Party" to "Contractor". b. An e-mail notification will be automatically sent to the Contractor informing that the Submittal has been processed. 	Max. 3 days
Contractor	<p>IF APPROVED</p> <ol style="list-style-type: none"> 1. Reconcile all review comments and implement. <p>IF REJECTED</p> <ol style="list-style-type: none"> 1. On re-submittal, append "Submittal No." by adding A, B, C, etc. Examples: 001A, 001B, 001C 	N/A