Submittal Package Review

What is a Submittal Package?

A submittal package represents a collection of submittals that will be sent to a series of reviewers for feedback. A designated manager of the package reviews the feedback and makes a final determination on each item in the package when he or she completes the package.

As submittals are received they can be electronically attached to the appropriate records and added to a submittal package for review. The submittal package can be thought of as a transmittal used to send one or multiple submittals on a workflow. The workflow is determined by the project team and can be adjusted by a GSA System Administrator as needed. Although a package could have multiple submittals, the reviewer approves or rejects them individually. As submittals are rejected new versions of the records are created automatically, in order to preserve the history of that document.

Who Will Use This?

✓ General Contractor

✓ Project Manager

✓ Construction Manager

✓ Architect/Engineer

Steps to Review a Submittal Package

1. Log into ePM as a user with the Submittal Reviewer security role, navigate to the appropriate project, and then to the My Notices register.

2. Click the link of the desired submittal package.
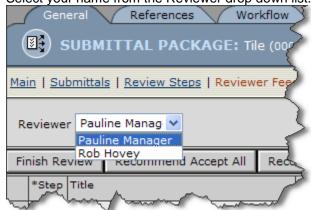

The package opens in read-only mode.

3. Click the 'Edit' button, then click the 'Reviewer Feedback' page.

4. Select your name from the Reviewer drop down list.

5. Enter your feedback and comments about each submittal

Note: To accept or reject all the submittals at once, just click the 'Recommend Accept All' or 'Recommend Reject All' buttons.

6. Click the 'Finish Review' button.

    Note: if the reviewers were set up in sequence, when the first reviewer clicks the Finish Review button, ePM sends a notice to the second reviewer

7. When the last person finishes their review, a notice is automatically sent to the Submittal Package Manager

    For instruction on completing submittal packages, see the Quick Reference Guide titled "GSA_QRG_Managing Submittals"

Tips

✓ Required fields are marked with an asterisk.

✓ Use the 'Forward' button if collaboration required from other users.

✓ Click on the **Activity Log** tab to view the audit trail of the document.

✓ Clicking the online help button provides generic help related to contracts, NOT for the specific uses of GSA's submittal documents.

✓ To explode or collapse sections in a document, click on the double headed arrow buttons:

✓ Notices with yellow icons require action; blue means a document was forwarded; white means you were cc'd.

✓ Once a reviewer has completed their review and clicked the 'Finish Review' button, the review fields can no longer be edited.

✓ For additional help and support, contact your GSA Regional Point of Contact: