

## 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. The designated manager of the package reviews the feedback and makes a final determination on each item in the package when the manager 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 ePM 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.

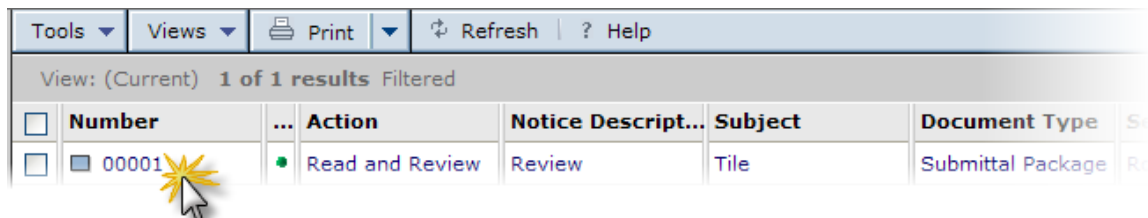
Please refer to the following QRGs: QRG.14\_Submittal Creation.

### 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.

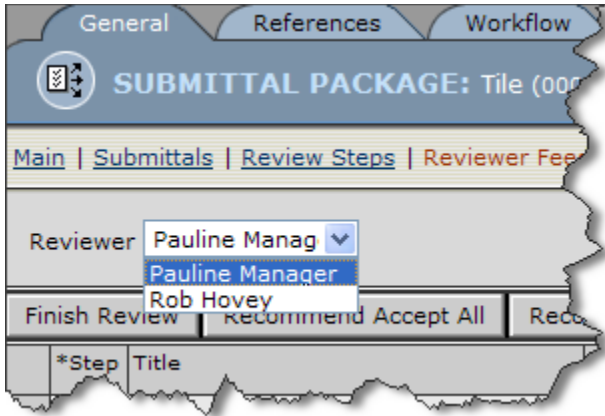


Tools		Views		Print	Refresh	Help
View: (Current) 1 of 1 results Filtered						
<input type="checkbox"/>	Number	...	Action	Notice Descript...	Subject	Document Type
<input type="checkbox"/>	00001		Read and Review	Review	Title	Submittal Package

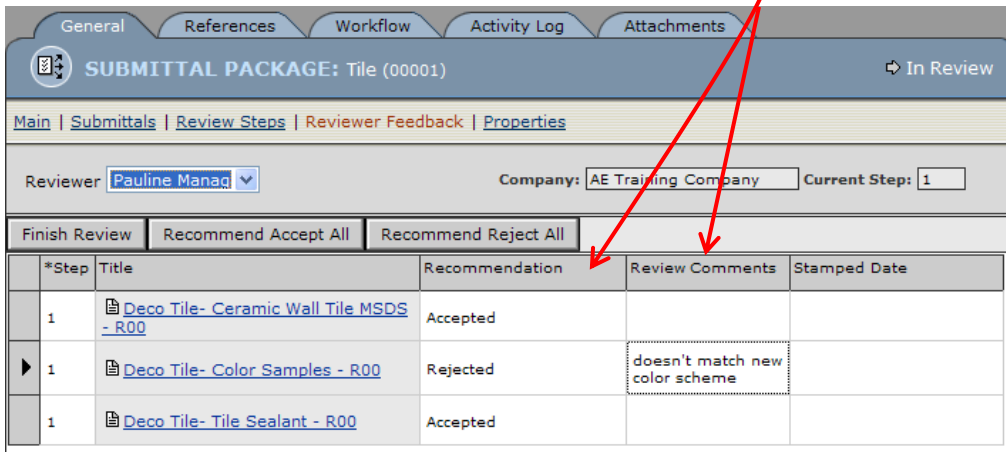
The package opens in read-only mode.

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

- Select the Reviewer's name from the Reviewer drop down list.



- Enter 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.

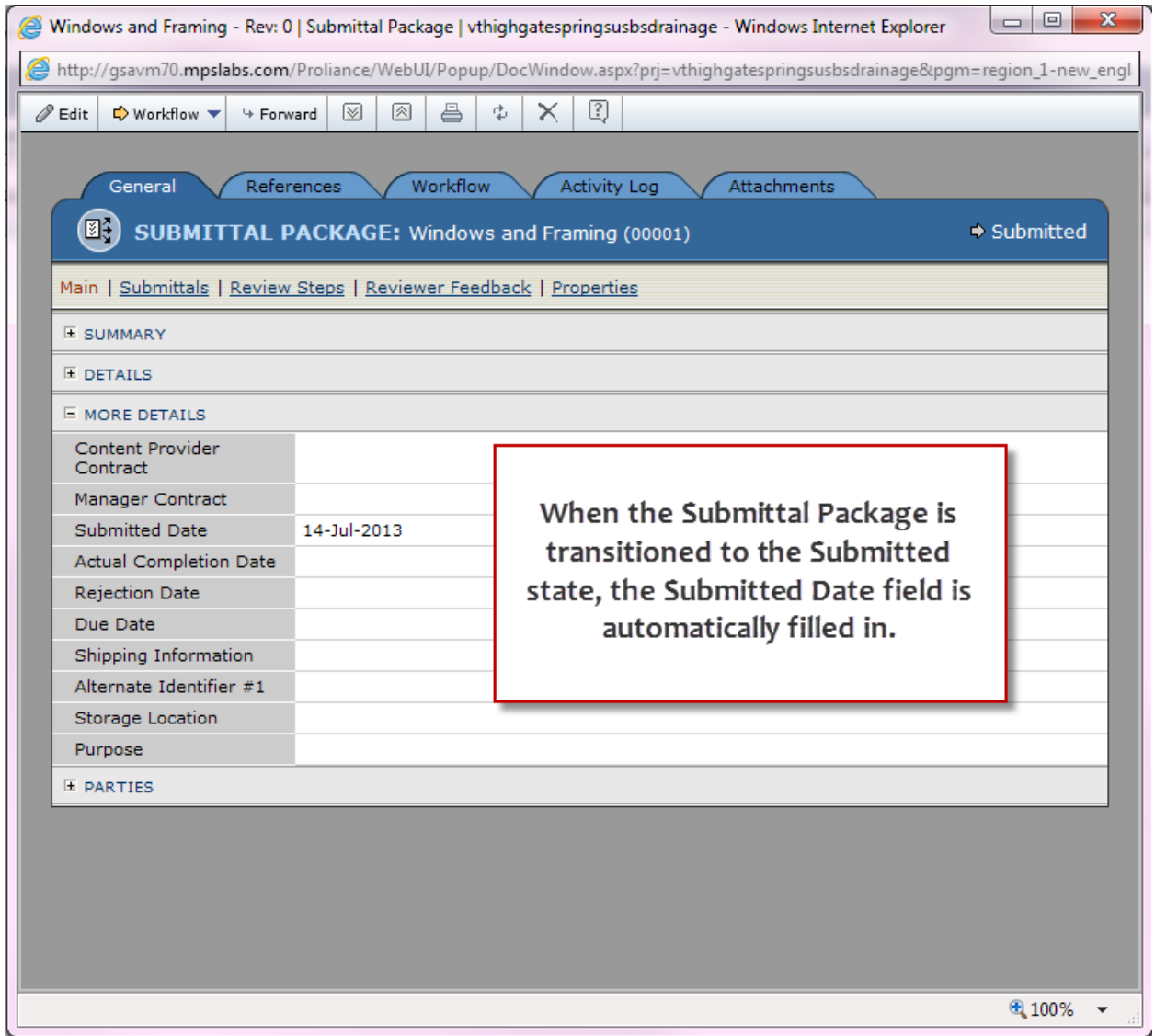
- Click the 'Finish Review' button.

**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

- 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 QRG.016 Submittal Management.

- When you transition your Submittal Package to the Submitted state, the Submitted Date field will automatically fill in.



### Tips

- ✓ Required fields are marked with an asterisk.

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

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

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- ✓ Submittal Managers have the ability to move Submittal Packages in the Submitted state back to the Draft state.

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

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

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

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

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- ✓ For additional help and support, contact the ePM Regional Point of Contact.

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