**Reviewing Submittals**

Overview: Submittals submitted by vendors require review prior response. Specification section requiring UH review will automatically be routed to the appropriate UH reviewer for comment.

Reference: N/A

|  |  |
| --- | --- |
| 1. Click on **FORMS**

**2****1** | 1. Click on **Submittals**
 |

1. OR, click on the link provided in the PM Web notification e-mail.



1. OR, select from the Workflow Inbox in your PM Web home screen

**Design Team Reviewer**

1. Select the ATTACMENTS tab and review the submittal documents.
2. Download submittal cover sheet.
3. If submittal requires UH review, add draft comments to submittal cover sheet and attach in the ATTACHMENTS tab.
4. Under the WORKFLOW tab, select the SUBMIT button.
5. Select REVIEW COMPLETED from the ACTIONs list, then click on **SAVE**.
6. Proceed to Step 26 or 32.
7. If submittal does **NOT** require UH review, add final comments to submittal cover sheet and attach in the ATTACHMENTS tab.
8. Under the WORKFLOW tab, select the SUBMIT button.
9. Select the appropriate action from the ACTION list (RESUBMIT, RETURN, FINAL APPROVE), then click on **SAVE**.

**UH Reviewer**

1. Review the submittal and draft Design Team comments.
2. UHS Reviewers are not required to submit comments. If choosing to comment, select the ‘**Details**’ tab at the bottom.
3. Click on the Layouts button to verify the ‘Submittals’ layout is selected.
4. Click on the **‘+Add**’ button.
5. In the ‘Sub #’ column, enter the submittal number or set number if applicable.
6. In the ‘UH Reviewer’ column, enter your name
7. Enter comments in the ‘UHS Reviewer Comments’ column.
8. Click the  **Save** icon in the bottom header bar.
9. To add additional comments, repeat the above steps.
10. Optional, when review is complete, select the ‘WORKFLOW’ tab at the bottom.
11. Select the button next to ‘COMPLETE REVIEW’ in the ‘ACTIONS’ box.
12. Click the **Save** button.

 **Additional TEAM Input**

1. To forward the submittal for input from additional team members with PM Web accounts, under the **WORKFLOW** tab, select the **TEAM INPUT** button





**30**

**27**

**28**

**29**

1. In the popup window, select team members to receive edit rights for the record. You can start typing a name to refine the list.
2. Check boxes for edit rights to be given.
3. Enter any comments in the **Message** box
4. Click on the **Save & Exit** button.
5. **IMPORTANT**, you MUST then click on the **SAVE** button under ACTIONS for the TEAM INPUT to be sent.

**Design Team Reviewer**

1. Select the ‘MAIN’ tab at the top.
2. Review any comments provided by UH Reviewers
3. Select all rows to review and click on the **Edit** button in the bottom header bar.
4. In the ‘Design Team Response’ column, provide comments.
5. In the ‘Action Taken’ column, select the appropriate action taken.
6. Click the  Update Records icon in the bottom header bar.
7. When all UHS Reviewer comments have been reviewed, update comments on the submittal set cover sheet and include as an attachment labeled as ‘Final Design Team Comments’.
8. Select the ‘Workflow’ tab at the bottom.
9. Select the appropriate action from the ACTION list (RESUBMIT, RETURN, FINAL APPROVE), then click on **SAVE**.
10. Process complete.