


Tips for Expediting Submittals

Acceptance of some Submittals are more critical than others to ensure that materials and equipment are delivered on time. The following tips can be utilized to help expedite those critical Submittals.

Packaging Submittals by Priority

If it is known in advance that a Submittal Item or small group of items need to be fast tracked through the review process, then package them accordingly. Do not include other items that are less critical that may slow the review process. Consider the following to highlight the urgency.

1. When populating the subject, prefix it with "URGENT:".



New Submittal Package

Cancel Save & Share

DETAILS

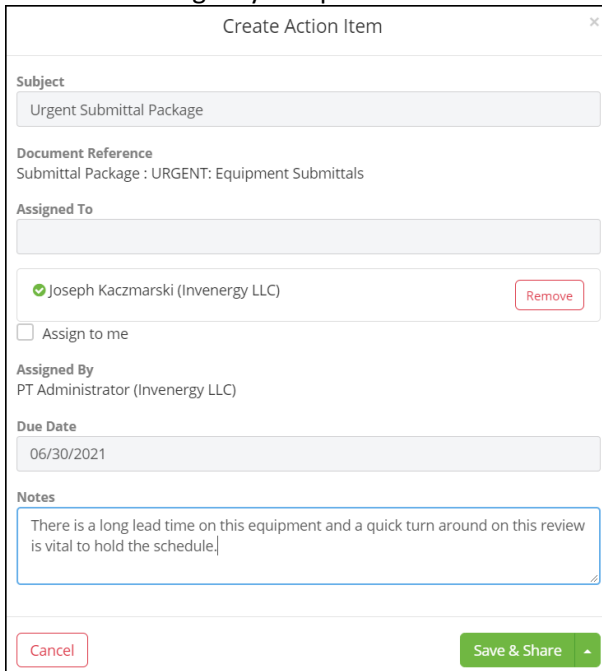
Subject
 URGENT: Equipment Submittals

Specification Section ⓘ
 48.15.00 ✕

Number
 01

Revision
 0

2. After initiating the workflow for the Submittal Package create an Action Item to the reviewer to reinforce the urgency and provide a due date.



Create Action Item

Subject
 Urgent Submittal Package

Document Reference
 Submittal Package : URGENT: Equipment Submittals

Assigned To
 Joseph Kaczmarek (Invenergy LLC) Remove

☐ Assign to me

Assigned By
 PT Administrator (Invenergy LLC)

Due Date
 06/30/2021

Notes
 There is a long lead time on this equipment and a quick turn around on this review is vital to hold the schedule.

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Proceeding with a Partial Submittal Package

If there are less critical items in a Submittal Package that are slowing the review do not let them hold up the more critical items. The following options can be used to eliminate these delays.

1. Reviewer can provide direction, via Comments, to proceed with an item or items while completing the review of the rest of the package. The Comments are a part of the audit history of the project and protect all parties by recording the direction provided.

The screenshot displays the 'DETAILS' tab of a submittal package. The left sidebar contains fields for Subject (Transformers), Specification Section (33.71.00), Number (01), Revision (0), Revision Date, Description, and Submittal Items. The 'Submittal Items' section contains a table with three rows. The right sidebar shows the 'ACTIVITY' tab with a comment input field and a 'Post' button. Below the input field, a comment from 'PT Administrator' dated '6/25/21 10:51 AM' is displayed, stating: 'Commented: "Proceed with Transformers B & C while I continue to review Transformer A."' This comment is highlighted with a red border. At the bottom of the right sidebar is the 'REFERENCE LINKS' section with a 'New' button.

Item #	Subject	Revision Date	Reviewer Action	Action Notes	Closed	Attachments
33.71.00-2.0	Transformer B		Accepted		<input checked="" type="checkbox"/>	0
33.71.00-3.0	Transformer c		Accepted as Noted		<input checked="" type="checkbox"/>	0
33.71.00-01.0	Transformer A	6/9/21			<input type="checkbox"/>	1

2. Alternately, the reviewer or contractor can remove an item or items from the package and re-submit them in a future package. This will allow those critical items that have already been reviewed to be finished leaving a clean record of the review and completed workflow. To remove an item:
 - a. Edit the Submittal Package
 - b. Click the arrow to the left of the item
 - c. Click remove
 - d. Follow this up with a Comment letting others know why it was removed.

Submittal Items							
				Add Existing		Create New	
	Item #	Subject	Revision Date	Reviewer Action	Action Notes	Closed	Attachments
	33.71.00-2.0	Transformer B		Accepted	Type the Action Notes		0
	33.71.00-3.0	Transformer c		Accepted as Noted	Type the Action Notes		0
	33.71.00-01.0	Transformer A	6/9/21		Type the Action Notes	<input type="checkbox"/>	1

NOTE: Unlike rejecting a Submittal Item, **Removing** a Submittal Item does not increment the item to the next version. It makes that same version of the item available for attachment to another Submittal Package.