

Kahua Quick Reference Guide

Submittal Items

Project Lifecycle Applicability



About Submittals Items

[Create a Submittal Item](#)

[Submittal Coordinator Reviewing Submittal Item \(skip if disabled on project\)](#)

[Official Reviewer Reviewing Submittal Item](#)

[Consultant Reviewer Reviewing Submittal Item](#)

[Review Submittal Item Response](#)

[Workflow Diagrams](#)

The **Packaged Submittals** application enables a project team to collaborate on individual Submittal Items or Submittal Packages. The Submittal Item can be created and routed to a Submittal Coordinator (if desired) to ensure everything is included in the submittal before it gets routed to the Official Reviewer(s). The Official Reviewer(s) can add additional Consultant Reviewer(s). All responses filter through the Official Reviewer before the submittal gets returned to the Submittal Coordinator (if included) or Submitting Vendor.

For integration with the Building Document Repository (BDR), the following criteria must be met:

- Kahua project is associated with a building in Project Details
- The file is uploaded in the References section of the Submittal Item
 - If using Submittal Packages sub-app, there is a Submittal Items section with a References section as well.
- The status of the submittal is “Completed”
- The file is under 200MB (a placeholder txt file will populate to BDR is size is over 200MB or there is a transmission error)

Note: For more information on how to build a Submittal Registry in Kahua please refer to either the [Submittal Registry Wizard QRG](#) which requires updating the project’s CSI Codes, or the [Export Import QRG](#), which can be done by the Regional Kahua Program Manager, GSA-PM/COR, or EXT-CMa. If not using a Submittal Registry, please proceed with the steps below to create an individual Submittal Item.

Note: The default Kahua workflow includes a Submittal Coordinator and Submitting Vendor

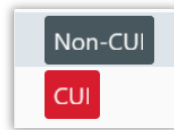
role. If the project team needs any or both roles and workflows turned off for their project, please submit a Kahua Support Ticket via the Google Form.

Create a Submittal Item

This action can be executed by the following roles: **GSA-PM/COR, GSA-Regional Manager, EXT-CMa, EXT-CMa (Limited), EXT-Contractor, EXT-Contractor (Limited), EXT-PM, Uncleared Contractor, and Uncleared Lessor.**

1. Open the appropriate project using **Project Finder** in the launch bar.
2. From the apps launcher, select **Packaged Submittals > Submittal Items**.
3. Click **NEW** to create a new Submittal Item record.
4. If applicable, select **CUI** or **Non-CUI** in the top right-hand corner of the record.

Note: Uncleared permission groups will not have the ability to select nor see CUI.



Details Section

5. The **Number** auto-populates but can be changed if needed.
6. Enter the required **Revision** and **Subject**.
7. If applicable, enter a **Description**.
8. The **Priority** defaults to Normal but can be change if needed.
9. The **Status** defaults to New and changes automatically as the document is workflowed.
10. The **Submittal Coordinator** defaults to the person creating the submittal but can be changed if needed. If the Submittal Coordinator workflow is disabled on the project, this field is hidden.
11. Select the required **Discipline**.
12. If applicable, select the **Type, Reason, and CSI Code**.

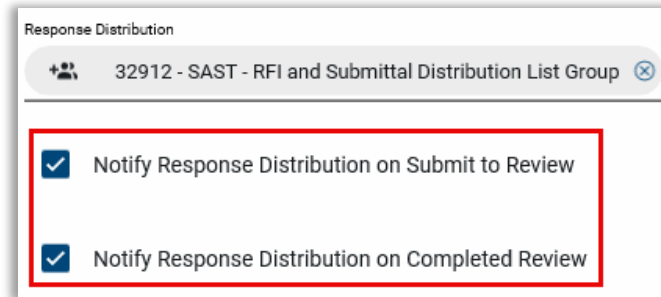
Note: To update the CSI Codes on the project, please refer to the [Submittal Registry Wizard QRG](#). These changes can be made by the Regional Kahua Program Manager, GSA-PM/COR, or EXT-CMa.

13. If applicable, select or enter the **Submitting Vendor, Lead Time (Days), Manufacturer, Model Number, and Country of Origin**.

Note: If a **Submitting Vendor** is entered and the **Request Submission** action button is clicked, a task notification and email can be sent to the vendor requesting they come into Kahua to submit submittal documents. This action button is disabled if the Submittal Vendor workflow is disabled.

14. In the **Response Distribution** field, select individual users or a distribution list. With the check boxes below, users in this field can be notified when the submittal goes out for official review (when the **Submit To Reviewers** button is clicked) and when the Official

Reviewer completes their review (when the **Respond** button is clicked by the Official Reviewer).



15. If applicable, enter any **Notes**.

Reviewers Section

Note: Anyone listed in the **Official Reviewer** field will be able to see the responses from the Consultant Reviewer(s), but only one Official Reviewer should provide a response.

- 16. In the **Official Reviewer** field, select the appropriate Official Reviewer(s). More than one user can be listed in this field, but it will capture the official response from the first person who clicks “Respond”.
- 17. If applicable, enter any **Instructions To Official Reviewer**.
- 18. The **Response** and **Response Notes** field will be filled in by the Official Reviewer when assigned.
- 19. If Consultant Reviewers are allowed to include additional Consultant Reviewers to the submittal, check the checkbox.

Consultant Reviewers (skip if no Consultant Reviewers)

Note: Consultant Reviewers can be added by the Submittal Coordinator and Official Reviewer(s) if needed.

- 20. If applicable, enter **Instructions**.
- 21. If applicable, select the following checkboxes:
 - a. **Sequential Review:** Allows user to define the order in which consultant reviewers receive a submittal task. Also defines if a Consultant Reviewer’s response is required before moving on to the next Consultant Reviewer. Users with the same “Order” number will receive the submittal task simultaneously.

- b. **Display Consultant Responses Upon Completion:** Allows the display of consultant response and reviewer notes on the main submittal record after the Official Reviewer completes their review.
 - c. **Display Consultant Responses Upon Consultant Response:** Allows the display of the consultant response and reviewer notes on the main submittal record after that consultant completes their review.
22. To add Consultant Reviewers, click **Insert** and fill in the **Reviewer** and **Response Due Date**. The Sent Date and Reviewer Response Date will auto-populate.

Submittal Dates Section

Note: The “Official Reviewer Review Period” and “Official Reviewer Response Due Date” are defaulted to “7 calendar days” and “7 calendar days from today’s date” respectively. Please submit a Kahua Support Ticket if the defaults need to change on the project.

- 23. The following fields are either optional or will be auto-populated in the workflow:
 - a. Date Required Onsite: Optional – unless tracking how many calendar days submittal material is need onsite

- b. Vendor Submission Period Days: Optional – unless tracking how many calendar days the vendor must come into Kahua to submit document
- c. Date Submitted To Official Reviewer: This field is auto-populated
- d. Official Reviewer Review Period: This field is auto-populated
- e. Consultant Review Period (Days): Optional – unless tracking how many calendar days consultant reviewers must review submittal
- f. Official Reviewer Response Due Date: This field is auto-populated
- g. Official Response Date: This field is auto-populated
- h. Date Returned to Vendor: This field is optional
- i. Date Completed: This field is auto-populated
- j. Date Last Distributed: This field is auto-populated

Comments Section

24. If applicable, enter any additional comments in the **New Comment** field.

References

25. If applicable, attach any supporting documentation to the **References** section using the **UPLOAD** or **ADD KAHUA DOC** buttons. Files uploaded in this section can integrate into BDR once the submittal item is Complete.

Action Buttons

26. Click **Save** to save your work, create the Submittal Item record, and finish it later. The Status will be **New**.
27. Click **Assign To Coordinator** if the Submittal Coordinator needs to review the submittal information before submittal is routed for an official review. The Status will change to **Coordinator Review**. This action button is disabled if the Submittal Coordinator workflow is disabled. The submittal can be Recalled while in review.
28. Click **Submit To Reviewers** if the Submittal is ready to be assigned to the Official Reviewer(s). The Status will change to **In Review**. The submittal can be Recalled while in review.
29. Click **Mark Complete** if the Submittal does not need to go through the workflow and it is for record keeping purposes. Once clicked, the **Distribute** button will appear so that the submittal may be distributed to the team. Status will change to **Completed**.
30. Click **Request Submission** if the contractor or vendor needs to upload the submittal in Kahua. An email and task notification are sent to the user listed in the **Submitting Vendor** field. The Status will change to **Requested**. This action button is disabled if the Submittal Vendor workflow is disabled.

Submittal Coordinator Reviewing Submittal Item (skip if disabled on project)

This action can be executed by the following roles: **Anyone assigned in the Submittal Coordinator field - typically GSA-PM/COR, EXT-PM, or EXT-CMa.**

1. Navigate to the **Tasks** app in the and open the Coordinator Triage submittal task.

Note: If you received a message with a direct link to your Kahua task, click link in the message.

2. If applicable, update any of the information in the Details, Reviewers, Consultant Reviewers, Submittal Dates, Comments, or References sections.
 - a. The Number, Revision, Status, and Submittal Coordinator fields cannot be updated.

Action Buttons

3. Click **Save** to save your work and finish later. Status will remain as **Coordinator Review**.
4. Click **Submit To Reviewers** if the Submittal is ready to be assigned to the Official Reviewer(s). The Status will change to **In Review**. The submittal can be Recalled while in review.
5. Click **Mark Complete** if the Submittal does not need to go through the workflow and it's for record keeping purposes. Once clicked, the **Distribute** button will appear so that the submittal may be distributed to the team. The Status will change to **Completed**.
6. Click **Request Submission** if the contractor or vendor needs to upload the submittal in Kahua. An email and task notification are sent to the user listed in the **Submitting Vendor** field. The Status will change to **Requested**. This action button is disabled if the Submittal Vendor workflow is disabled.

Official Reviewer Reviewing Submittal Item

This action can be executed by the following roles: **Anyone assigned in the Official Reviewer field - typically GSA-PM/COR, EXT-PM, EXT-CMa, or EXT-AE.**

1. Navigate to the **Tasks** application in the and open the Submittal Item Official Reviewer task.

Note: If you received a message with a direct link to your Kahua task, click link in the message.

Add Consultant Reviewers to a Submittal Item (skip if no Consultant Reviewers)

2. In the **Consultant Reviewers** section, if applicable, enter any **Instructions** for the consultant reviewers.
3. To add one or more Consultant Reviewers, click **Insert**, select the **Reviewer**, and enter the **Response Due Date**.
4. Click **Submit To Reviewers** once all Consultant Reviewers have been added. The **Sent Date** will populate next to name of the Consultant Reviewer(s) indicating the task and message notifications were sent.

- The Official Reviewer(s) will receive an email and message notification when each Consultant Reviewer submits their response. The Consultant Reviewer(s) response will appear in the Consultant Reviewers section under the **Consultant Response** and **Reviewer Notes** columns. Once all necessary consultant reviewer(s) have responded to the submittal item, the Official Reviewer can make the final response of the submittal item using the steps in the [Responding to a Submittal Item](#) section.

Respond to a Submittal Item

Note: If there is more than one Official Reviewer listed, only one of the Official Reviewers can perform the steps below responding to the submittal item. If more than one Official Reviewer needs to respond the submittal item, the additional reviewers should be listed in the Consultant Reviewers section.

- Review the Details section, document(s) uploaded in the References section, and responses from the consultant reviewers, if applicable.
- In the **Reviewers** section, select the appropriate **Response** using the drop-down list and enter any **Response Notes**.

Comments

- If applicable, enter any additional comments in the **New Comment** field.

References

- If applicable, attach any supporting documentation to the **References** section using the **UPLOAD** or **ADD KAHUA DOC** buttons. Files uploaded in this section can integrate into BDR once the submittal item is Complete.

Action Buttons

1. Click **Save** to save your work and finish later. Status will remain **In Review**. The submittal can be Recalled while in review.
2. Click **Submit To Reviewers** if the submittal needs to be sent to Consultant Reviewer(s). Status will remain **In Review**. The submittal can be Recalled while in review.
3. Click **Respond** to submit the final response of the submittal item. Status will change to **Response Received**.

Consultant Reviewer Reviewing Submittal Item

This action can be executed by the following roles: **Anyone assigned in the Consultant Reviewer field**.

1. Navigate to the **Tasks** application and open the Submittal Item Consultant Reviewer task.

Note: If you received a message with a direct link to your Kahua task, click link in the message.

Adding Consultant Reviewers to a Submittal Item (skip if no Consultant Reviewers)

2. In the **Consultant Reviewers** section, if applicable, select the **New Consultant Reviewers** from the drop-down list.
3. Click **Send to New Consultant Reviewers** for the new consultant reviewers to receive a message and task notification.

Reviewer	Sent Date	Response Due Date	Reviewer Response Date	Consultant Response	Reviewer Notes
<input checked="" type="checkbox"/> Cillisha Knights - GSA	9/17/2024	9/17/2024			

Respond to a Submittal Item

4. Review the Details section, document(s) uploaded in the References section, and responses from the consultant reviewers if applicable.
5. In the **Consultant Reviewers** section, next to your name, select the appropriate **Consultant Response** and enter any **Reviewer Notes**.

Comments

- If applicable, enter any additional comments in the **Reviewer Notes** field.

References

- If applicable, attach any supporting documentation to the **References** section using the **UPLOAD** or **ADD KAHUA DOC** buttons. Files uploaded in this section can integrate into BDR once the submittal item is Complete.

Action Buttons

- Click **Save** to save your work and finish later. Status will remain **In Review**. The submittal can be Recalled while in review.
- Click **Respond** to submit your response to the submittal. The **Reviewer Response Date** will auto-populate. The Official Reviewer receives a message notification when each consultant reviewer responds. Status will remain **In Review** until the Official Reviewer provides the final response. The submittal can be Recalled while in review.

▼ CONSULTANT REVIEWERS

Instructions

Reviewer Cillisha Knights - GSA

Response Due Date 9/17/2024

New Consultant Reviewers ▼

	Reviewer	Sent Date	Response Due Date	Reviewer Response Date	Consultant Response	Reviewer Notes
<input checked="" type="checkbox"/>	Cillisha Knights - GSA	9/17/2024	9/17/2024		▼	_____

Review Submittal Item Response

This action can be executed by the following roles: **Anyone assigned in the Submittal Coordinator field if applicable or the author of the Submittal Item if Submittal Coordinator is disabled. Typically GSA-PM/COR, EXT-PM, EXT-CMa, EXT-CMa (Limited), EXT-Contractor, EXT-Contractor (Limited), EXT-Lease Broker Contractor, Uncleared Contractor, or Uncleared Lessor.**

- Navigate to the **Submittal Items** application in the open the submittal. Review the responses and notes in the submittal. The status would be **Response Received**.

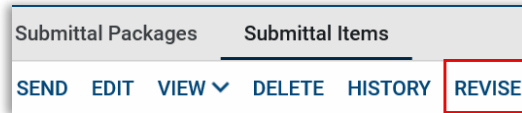
Note: If you received a message with a direct link, click link in the message.

Action Buttons

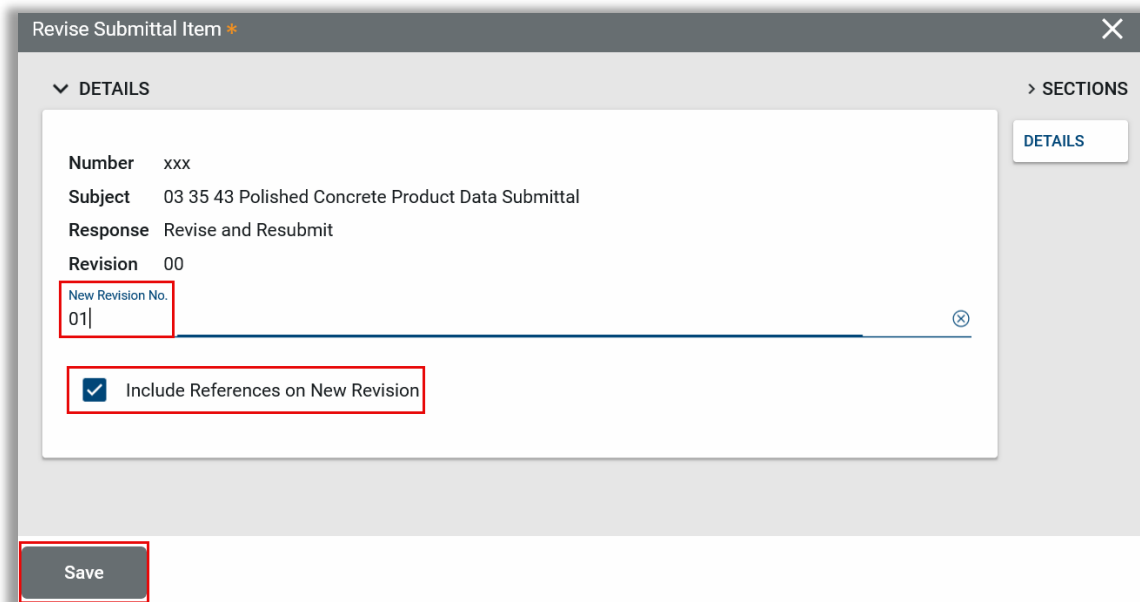
- Click **Return to Official** if the Official Reviewer needs to revise their response. Status will change to **In Review**.
- Click **Mark Complete** if the response is acceptable. Once clicked, the **Distribute** button will appear so that the submittal may be distributed to the team. Status will change to

Completed.

4. Click **Request Corrections** if the contractor or vendor needs to input or upload additional information that's requested and input the reason. If another review is needed, use the **Revise** button. An email and task notification are sent to the user listed in the **Submitting Vendor** field. Status will change to **Requested**. This action button is disabled if the Submittal Vendor workflow is disabled.
5. Click **Revise** in the top toolbar to begin the revision submittal. The status will change to **Revised** to begin the workflow of the revised submittal.

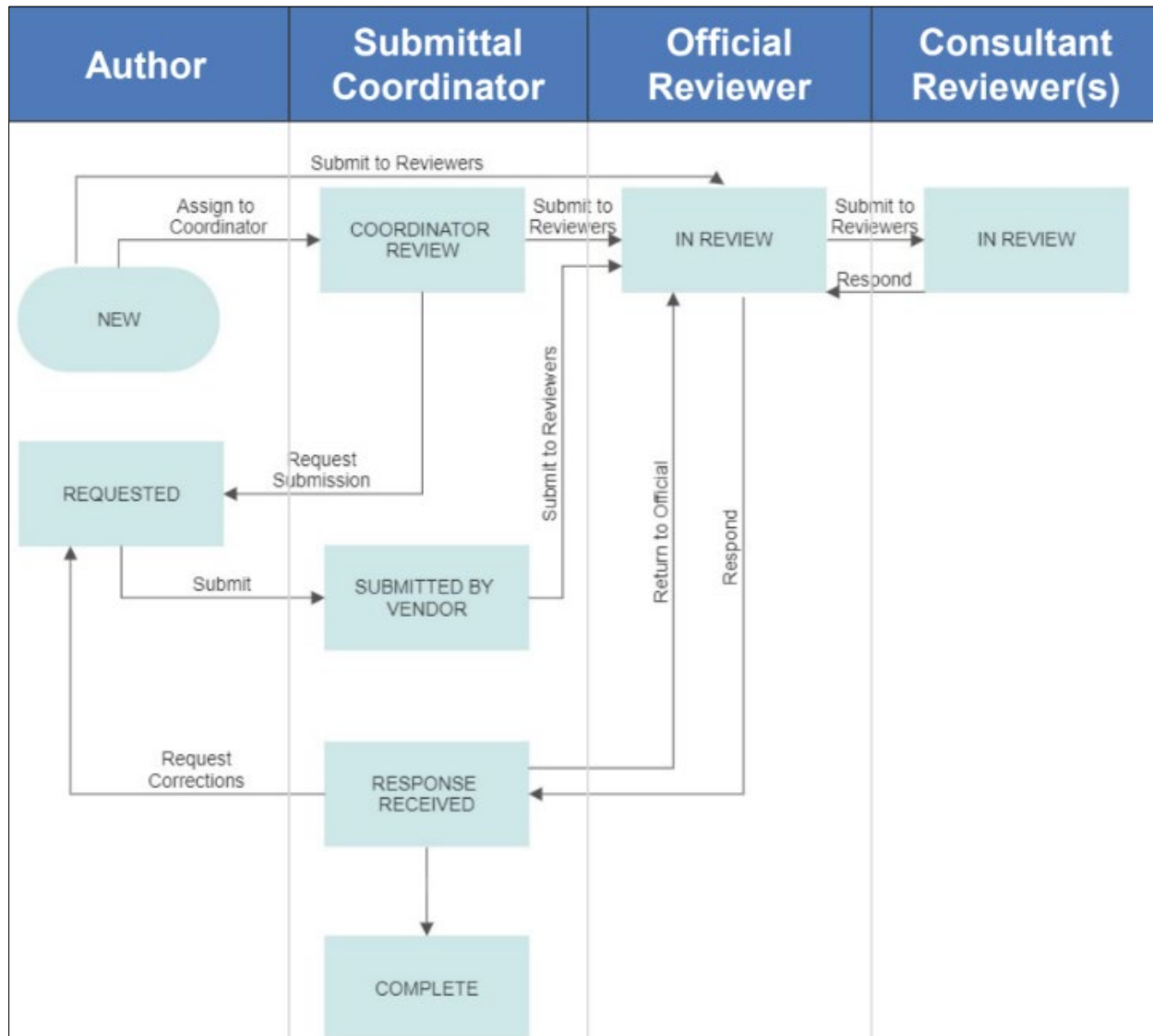


- a. In the Revise Submittal Item window, input the **New Revision No.**, choose if to **Include References on New Revision**, and click **Save**.
- b. The new revision submittal will display in the log view, and the previous submittal is stored in the **Previous Revisions** section within the submittal item. At this point, the new submittal can be edited and re-routed for review starting from the beginning of the workflow.

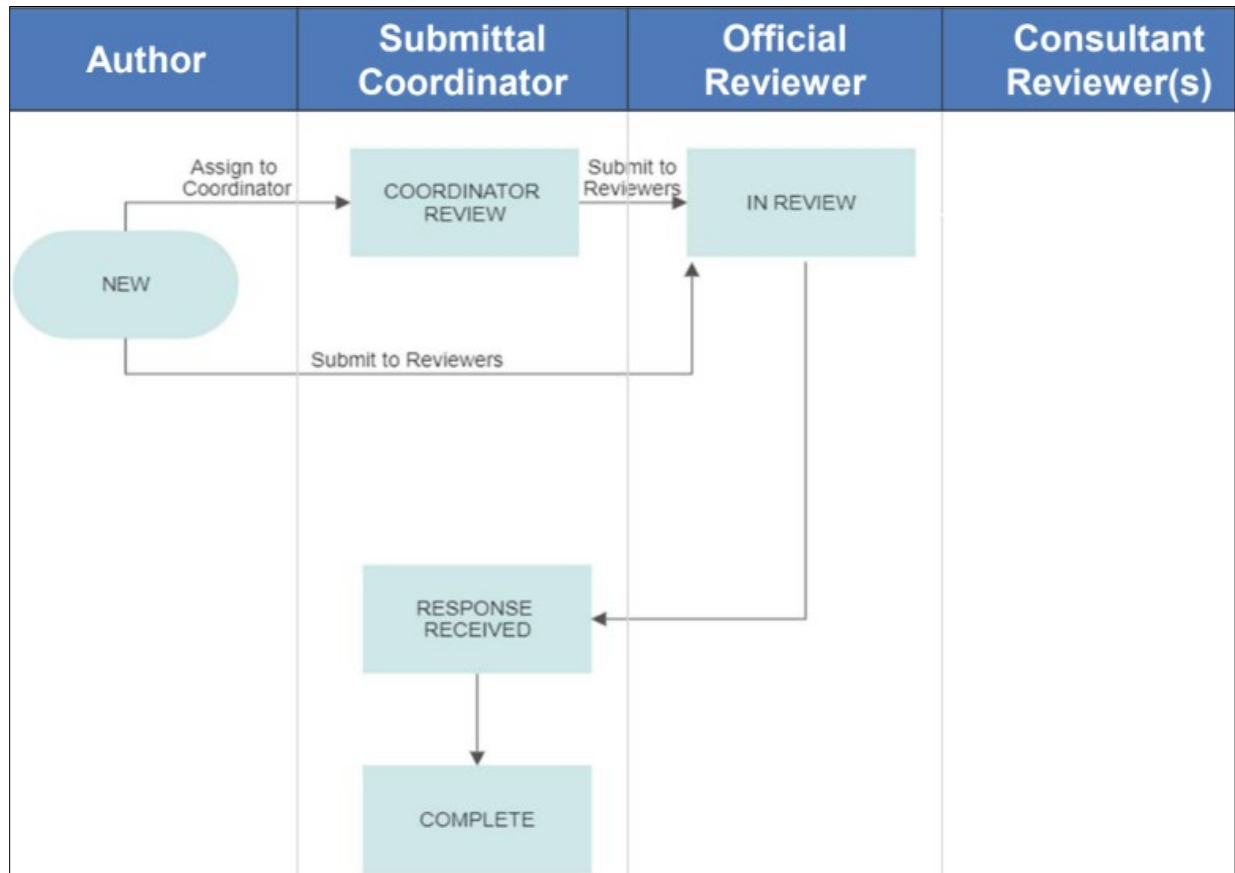


Workflow Diagrams

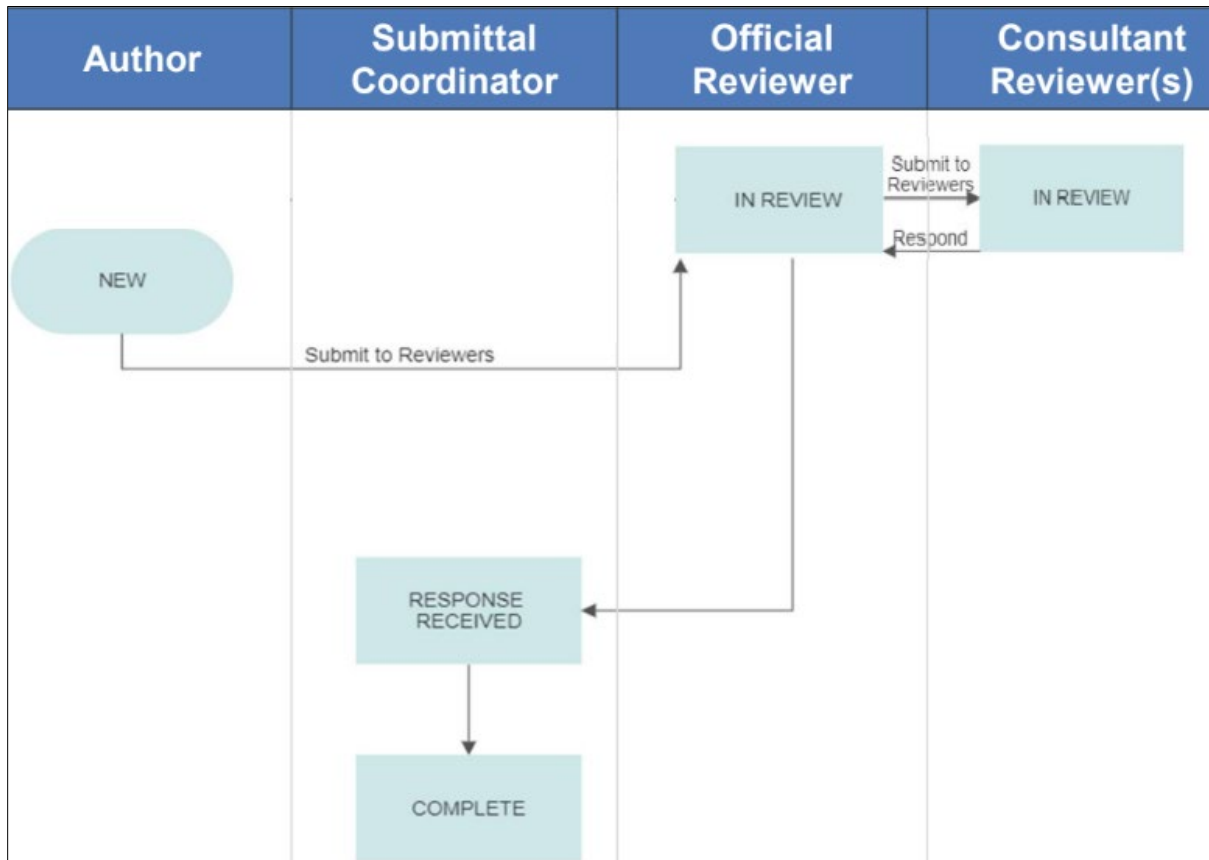
Full Submittal Workflow Diagram



Basic Submittal Workflow Diagram (No Consultant Reviewer)



Basic Workflow Diagram (No Submittal Coordinator)



Resources

For additional help with Kahua applications, you can access the instructor-led training calendar, self-paced videos, and Quick Reference Guides (QRGs) from this link: [Training: Project Management tool | GSA](#)

Related QRGs

[References](#) for help attaching Supporting Documents and using **Add Composite** to attach the record’s portable view as a Submittal Transmittal.

[Markups](#) for help with adding Markups to documents uploaded to the References section.

[Submittal Registry](#) for instructions for using the Submittal Registry feature.