Kahua Quick Reference Guide
Submittal Packages

Project Lifecycle Applicability

About Submittal Packages

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The **Packaged Submittals** application enables a project team to collaborate on individual Submittal Items or Submittal Packages. The Submittal Package 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 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.

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 Package

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 Packages**.
3. Click **NEW** to create a new Submittal Package 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.
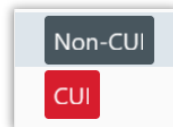

Details Section

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 **Track Items with Package** checkbox will default true to indicate that there are submittal item records that need to be tracked with the submittal package.
10. The **Status** defaults to New and changes automatically as the document is workflows.
11. Select the required **Submittal Coordinator** and **Submitting Vendor**. If one or both workflows are disabled on the project, these fields are hidden.
12. If applicable, select the **CSI Code**.

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

13. 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).
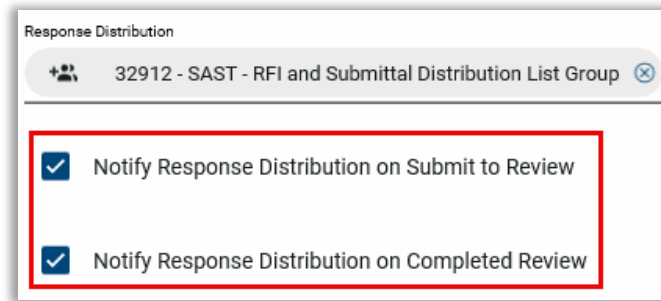
14. If applicable, enter any **Notes**.

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.

15. 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".
16. If applicable, enter any **Instructions To Official Reviewer**.
17. The **Response** and **Response Notes** field will be filled in by the Official Reviewer when assigned.
18. If consultant reviewers are allowed to add additional consultant reviewers to the submittal, check the checkbox.

Consultant Reviewers Section (skip if no Consultant Reviewers)

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

19. If applicable, enter any **Instructions**.
20. 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.

21. To add consultant reviewers, click **Insert** and fill in the **Reviewer** and **Consultant Due Date**.

Submittal Dates

Note: The "Official Reviewer Review Period" and "Consultant Review Period" are defaulted to "7 calendar days" and "14 calendar days" respectively. Please submit a Kahua Support Ticket if the defaults need to change on the project.

22. The following fields are either optional or will be auto-populated in the workflow:
    a. Vendor Submission Period Days: Optional – unless tracking how many calendar days the vendor must come into Kahua to submit document
    b. Date Submitted To Official Reviewer: Auto-Populated
    c. Official Reviewer Review Period: Auto-Populated
    d. Consultant Review Period (Days): Auto-Populated
    e. Official Reviewer Response Due Date: Auto-Populated
    f. Official Response Date: Auto-Populated
    g. Date Returned to Vendor: Optional
    h. Date Completed: Auto-Populated
    i. Date Last Distributed: Auto-Populated

Submittal Items

Note: In this section, there are two ways to build out the submittal items in a package. Use **Option 1** if a Submittal Registry or Submittal Item was not previously created. Use **Option 2** if a Submittal Registry or a Submittal Item was previously created.

Option 1: Insert New Submittal Items

23. The **Package Response Locks Item Response** checkbox, **Response For Items** drop-down list, and **Package Response Notes** field will be filled in by the Official Reviewer during their review.
24. Click **Insert** then the flyout icon to begin creating a new submittal item in the package.

25. In the Submittal Package > Submittal Item window, fill out the necessary information for the submittal item. The document for the specific submittal item needs to be uploaded in the submittal item's **Reference** section for it to integrate into BDR. Once complete, repeat the steps for the next submittal item or click **Done** in the top right corner.

Option 2: Insert Existing Submittal Items

26. The **Package Response Locks Item Response** checkbox, **Response For Items drop-down list**, and **Package Response Notes** field will be filled in by the Official Reviewer during their review.
27. Click **Insert Existing** to begin selecting submittal items to include in the package from the Submittal Items log.
28. Use the checkboxes to select the appropriate submittal item(s) then click **Select** to add the submittal items to the package.

29. Once added to the grid box, use the **View Details** button to open the Submittal Package > Submittal Items window and ensure the necessary information is filled out in the submittal item(s). The document for the specific submittal item needs to be uploaded in the submittal item's **Reference** section for it to integrate into BDR. Once complete, repeat the steps for the next submittal item or click **Done** in the top right corner.

Comments

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

References

31. If applicable, attach any supporting documentation to the **References** section using the **UPLOAD** or **ADD KAHUA DOC** buttons. Files uploaded in this section will not integrate into BDR. Please ensure the submittal item's document is uploaded in the References section for each submittal item.

Action Buttons

32. Click **Save** to save your work, create the Submittal Package record, and finish later. Status will be **New**.

33. Click **Assign To Coordinator** if the Submittal Coordinator needs to review the submittal information before submittal is routed for an official review. 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.

34. Click **Submit To Reviewers** if the Submittal is ready to be assigned to the Official Reviewer(s). Status will change to **In Review**. The submittal can be Recalled while in review.

35. 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. Status will change to **Completed**.
36. 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. Status will change to **Requested**. This action button is disabled if the Submittal Vendor workflow is disabled.

Submittal Coordinator Reviewing Submittal Package (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** application 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). 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. 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. Status will change to **Requested**. This action button is disabled if the Submittal Vendor workflow is disabled.

Official Reviewer Reviewing Submittal Package

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**.

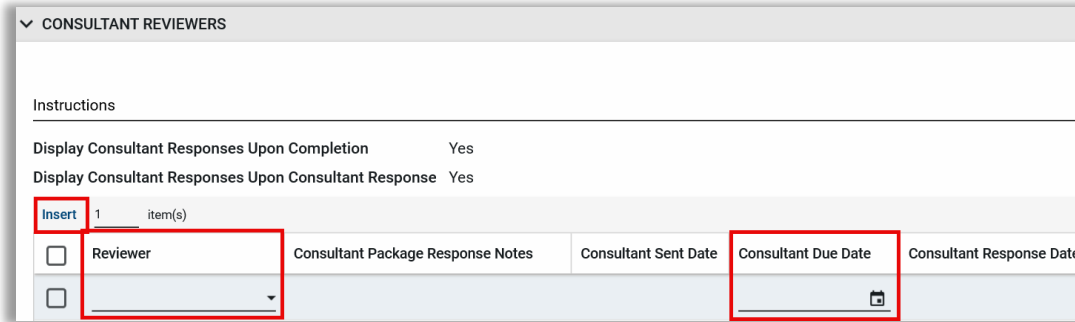1. Navigate to the **Tasks** application in the and open the Submittal Package Official Reviewer task.

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 Package (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 select the **Consultant Due Date**.
4. Click **Submit To Reviewers** once all consultant reviewers have been added. The **Consultant Sent Date** will populate next to name of the consultant reviewer(s) indicating the task and message notifications were sent.

5. 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 Package Response Notes** columns. Once all necessary consultant reviewer(s) have responded to the submittal package, the Official Reviewer can make the final response of the submittal package using the steps in the [Responding to a Submittal Package](#) section.

Responding to a Submittal Package

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 package. If more than one Official Reviewer needs to respond the submittal package, the additional reviewers should be listed in the Consultant Reviewers section.

6. Review the Details section. Click the **View Details** button in the **Submittal Items** section to view each submittal items document.
7. In the **Submittal Items** section, select the appropriate **Response** using the drop-down list. Click downward arrowhead to view the consultant reviewer response for each submittal item.

Note: To apply the same response to all submittal items, use the **Response For Items** drop-down list.

Comments

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

References

9. If applicable, attach any supporting documentation to the **References** section using the **UPLOAD** or **ADD KAHUA DOC** buttons. Files uploaded in this section will not integrate into BDR. Please ensure the submittal item's document is uploaded in the References section for each submittal item.

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 package. Status will change to **Response Received**.

Consultant Reviewer Reviewing Submittal Package

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 Package Consultant 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 Package (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.

Respond to a Submittal Package

4. Review the Details section. Click the **View Details** button in the **Submittal Items** section to view each submittal items document.
5. In the **Submittal Items** section, next to the submittal item, select the appropriate **Response** from the drop-down list and enter any **Response Notes for** each submittal item.

Note: To apply the same response to all submittal items, use the **Consultant Response For Items** drop-down list and **Reviewer Notes for Items** field.

Comments

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

References

7. If applicable, attach any supporting documentation to the **References** section using the **UPLOAD** or **ADD KAHUA DOC** buttons. Files uploaded in this section will not integrate into BDR. Please ensure the submittal item's document is uploaded in the References section for each submittal item.

Action Buttons

8. Click **Save** to save your work and finish later. Status will remain **In Review**. The submittal can be Recalled while in review.
9. Click **Respond** to submit your response to the submittal. The **Consultant 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.

Review Submittal Package 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 Package 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**.

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

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

Action Buttons

2. Click **Return to Official** if the Official Reviewer needs to revise their response. Status will change to **In Review**.
3. 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.
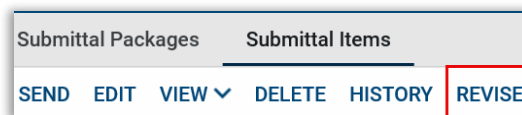
   a. In the Revise Submittal Package window, input the **New Package Revision Number**, select which submittal item(s) need to be revised, verify the selected submittal item has the correct **New Revision No.**, choose if to **Include References on New Revision**, and click **Save**.
   b. The new revision submittal will display in the log view, and the previous submittal is stored in the **Previous Revisions** section within the submittal package. At this

point, the new submittal can be edited and re-routed for review starting from the beginning of the workflow. Notice that any submittal item(s) not selected for revision will be locked with its original response.
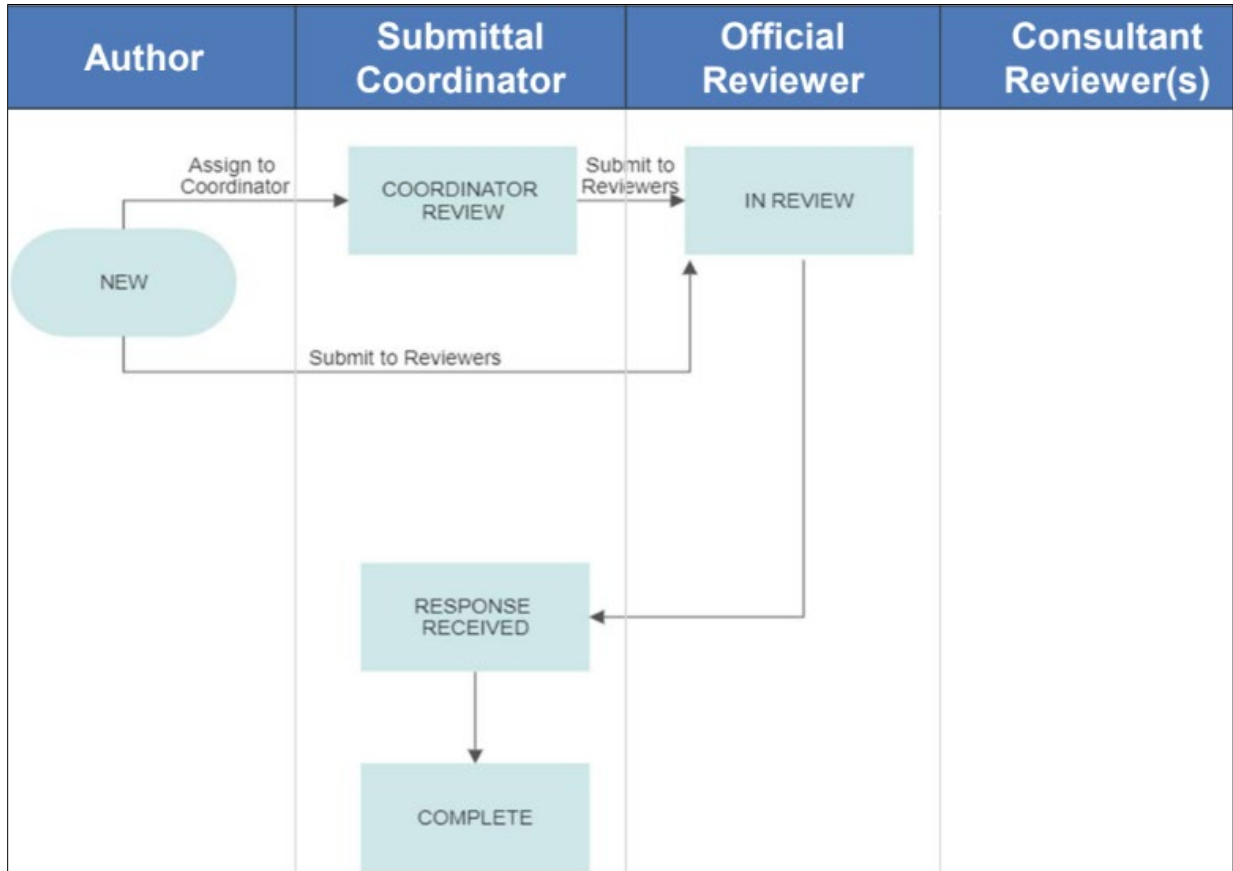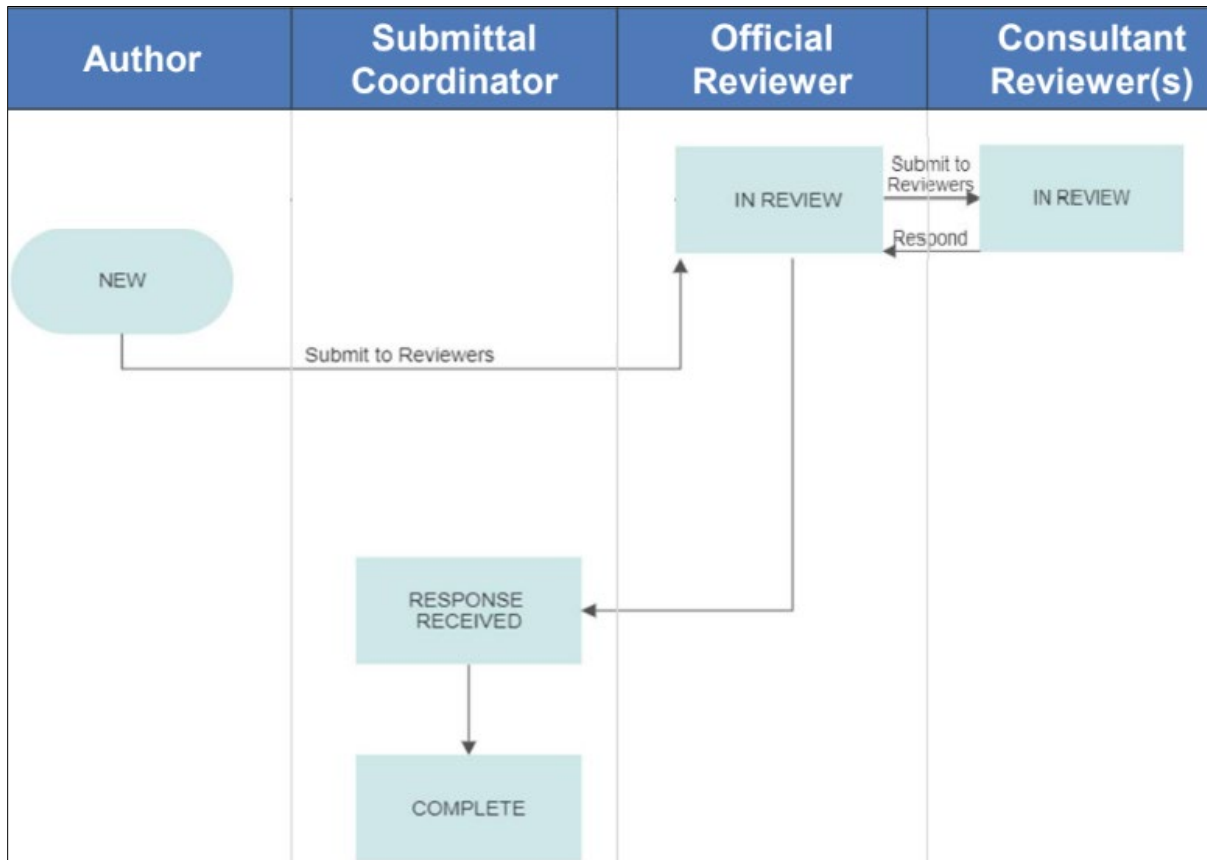
Workflow Diagrams

Full Submittal Workflow Diagram
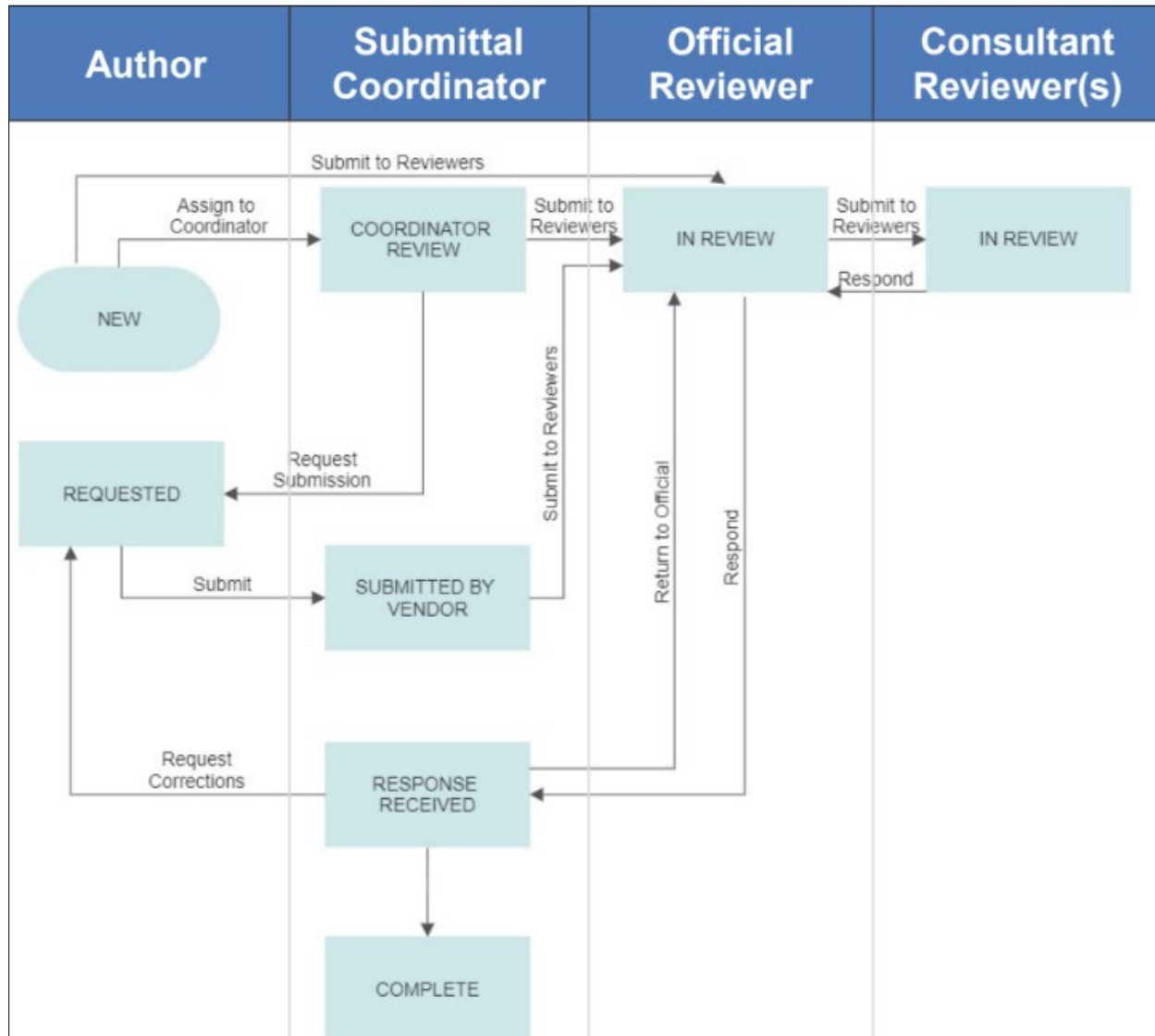
Basic Submittal Workflow Diagram (No Consultant Reviewer)

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.