



## Project Management Submittal SOP

PM (5.201)  
Rev. # 0.2

Date 6/01/2026  
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### Purpose:

To ensure all materials are installed per contract documents and owner's requirements.

### Procedure:

- 1) Review project documents or design/build requirements for submittal/shop drawing requirements and format.
- 2) Link the schedule in Outbuild to Procore, so schedule information and schedule tasks can be shared between the Procore submittal tool and the project schedule in Outbuild.
- 3) Create submittal log in Procore to be reviewed weekly
  - A) Use the "Create Submittals from Specifications" tool or create each submittal manually
  - B) When creating the submittal log make sure the following info is included in each submittal:
    - i) Specification Number
    - ii) Submittal type
    - iii) Submittal package if applicable
    - iv) Responsible subcontractor
    - v) "Submit by" deadline
    - vi) "Schedule Task" (under "Submittal Schedule Information")
    - vii) "Required on site" deadline (under "Submittal Schedule Information")
- 4) Prioritize submittals from material suppliers and subcontractors.
- 5) Request submittals from material suppliers and subcontractors.
  - A) Contact time sensitive vendors
  - B) Contact Language
- 6) Receive and log shop drawing/submittal.
- 7) Review shop drawing/submittal.
  - A) Check shop drawing/submittal for proper format.
    - i) Request additional information if necessary.
  - B) Review shop drawing/submittal for compliance with drawings and specification.
  - C) Prepare shop drawing/submittal for submission to architect.
    - i) Stamp drawing with GC stamp.
      1. Add revivers signature to stamp.
- 8) Submit reviewed shop drawing/submittal to Architect in proper format on Procore as outlined below:
  - A) In general information make sure you fill out the following:
    - i) Title of Submittal
    - ii) Specification Section
    - iii) Submittal Type



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- iv) Submittal Package (Each trade needs their own package, how to create a package is outlined in a Procore How to)
- v) Who you received it from and responsible contractor.
- vi) Submittal manager (Typical APM or PE)
- vii) The date you received the submittal.
- viii) Final Due Date (refer to date you need it onsite and lead time)
- ix) Distribution list (make sure to add the Crain project Team)
- x) Lead Time.
- xi) Submittal workflow
  - 1. Submittal Manager
  - 2. Engineer or Designer
  - 3. Architect (always add the architect
- 9) Retain one copy of reviewed shop drawing/submittal for file (this is maintained on Procore)
- 10) Contact Architect to inquire about tardy shop drawing/submittal return if necessary Procore will highlight past due submittals in red.
- 11) Receive and log returned shop drawing/submittal from Architect.
- 12) Review returned shop drawing/submittal for action required:
  - A) For submittals that are returned as approved, approved as noted and for record only do the following:
    - i) Review all notes.
    - ii) Email a copy of the submittal to the sub.
    - iii) Release sub on the material and request a lead time.
    - iv) Inform the team of the updated lead time and comments as well as any comments the sub may have.
    - v) Once the sub and team have been informed close the submittal on Procore.
  - B) For submittals that are returned as rejected, revise and resubmit do the following:
    - i) Review all notes.
    - ii) Email a copy of the submittal to the sub.
    - iii) Inform the sub of issues on the submittal and request they resubmit with notated updates.
    - iv) Request the sub send over updated lead times with added in time for the resubmit.
    - v) Update team on issues and lead times.