



## SUBMITTAL REGISTER: HOW TO

**BEST PRACTICES:** Submittal Registers are extremely valuable and are used in many more ways than to track submittals. Project managers may use them to help outline contract scopes of work. Superintendents may use them to identify which subcontractor is performing which scope of work.

1. Create an excel file - see template for example.
2. Open up your specification manual electronically (word file is best). If you have the pdf only, run an OCR scan in Bluebeam/Adobe to identify text to allow for copy paste into your submittal register.
3. Copy/paste the table of contents to import all of your spec section numbers and descriptions.
4. Go through each spec section to identify and indicate all submittal requirements for each specification section within the submittal register.
5. With your PM and superintendent, fulfill the following:
  - a. Fill in any additional submittals that may be needed (e.g. pre-installation checklists)
  - b. Assign which spec sections pertain to which subcontractors.
  - c. Coordinate and indicate when materials will be needed onsite.
6. Contact each supplier/subcontractor to identify material lead times. Make sure they are conservative on their estimate.
7. Fill in remaining dates that apply.
8. Use the "Filter" tool in excel to create and compile custom subcontractor/supplier specific "submittal registers" in pdf format. *Note: hide columns involving "material delivery coordination" since this is for BSC's reference only.*
9. Send to each supplier/subcontractor their custom submittal register requesting all submittals in electronic and sample format be submitted within 10 days.
10. Track when each submittal is received within your submittal register. If submittals are not received within the required amount of time, continue sending daily dunning letter emails until all items are received. *Note: Some submittals cannot be submitted until others are approved. For example, Samples for initial selection are needed approved before samples for verification. Get with your PMs if a subcontractor makes this case with any of their submittals.*
11. See "Submittals" section for what to do once submittals are received.