

Submittal Review Checklist

A PM's step-by-step check before routing a submittal up the chain

The product and coordination checks below use HVAC equipment as the example. The structure holds for any submittal, but the specific items you verify will be whatever your trade and spec call for. Treat this as a model to adapt.

Orientation

- ☐ Read the submittal first. Identify what it is: cut sheet, shop drawings, certification, test report, or a full package.
- ☐ Pull the matching spec section and the relevant drawings (equipment schedule, plans).
- ☐ Confirm you're working from the current drawing revision. Check for any addenda, CCDs, ASIs, or other changes released since the base set.

Completeness

- ☐ Check the spec's submittal requirements and confirm every required item is in the package.
- ☐ Product data, performance data, dimensions, electrical data, certifications, and any required options.
- ☐ If anything is missing, send it back to the vendor or contractor before going further.

Product Data vs. Spec (HVAC example)

- ☐ Capacity: sensible and total cooling meet or exceed the schedule.
- ☐ Electrical: voltage and phase match the design.
- ☐ Cross-check breaker sizing and MOP against the electrical plans, not just the mechanical schedule.
- ☐ Physical fit: dimensions and weight match the design.
- ☐ Coil and configuration: rows, airflow, anything the schedule specified.
- ☐ Spec extras: coatings, filters, add options confirmed in the submitted unit.

Coordination (HVAC example)

- ☐ Weight of the submitted unit matches the design weight. Flag any increase for the structural engineer.
- ☐ Space and service clearances work in the actual location.
- ☐ Connections match what the other trades are roughing in: duct sizes, piping (CHW, drain, reheat), controls.
- ☐ Supports and isolation accounted for: concrete pad, spring isolators if required.

Decide and Route

- ☐ If it meets the plans and specs, prepare it to route up to the GC, CM, engineer, or architect.
- ☐ If the vendor sent the wrong thing, send it back for correction.
- ☐ If the product can't meet the spec as written, start a variance or RFI.
- ☐ Log the submittal in your submittal log.
- ☐ Route it up with a cover sheet or transmittal, and record the date sent.