



RFIs Training Guide (Mentor)

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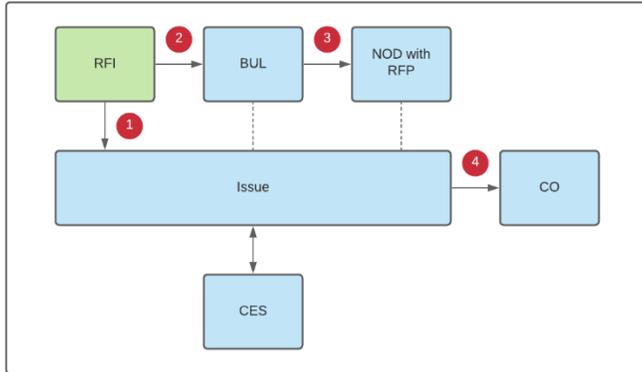
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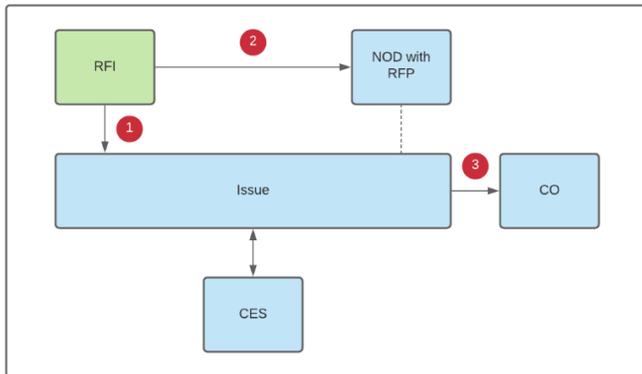
About

A Request for Information (RFI) is a formal written process submitted by the General Contractor for clarification regarding potential changes from the onset of a job. A RFI results in one of the following:

Bulletin Required



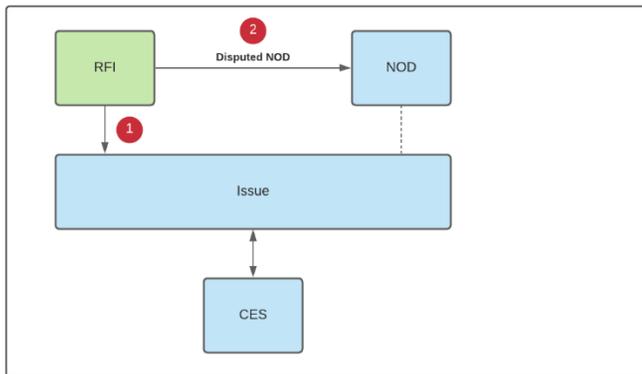
NOD Required



Clarification Only

Not Valid / Disputed

Note: These two statuses may be disputed and could result in a Disputed NOD



Additional Information Required

Notes

While the RFI process is consistent for all project types, the terms CM Firm and CM PM are specific to Requirements projects. The CM Firm acts on behalf of the General Contractor and the CM PM is in the role of the Project Officer.

Process Overview

The CM Firm creates an RFI, initiates an Issue, then submits the RFI in CAMP. There are three possible routes.

- 1. The RFI’s CSI Division starting with G01/S01.** The RFI is sent to the CM PM/PO for a response, and when applicable, the RFI is sent to Secondary Responder(s) for comment before being returned to the CM PM/PO for the final response.
- 2. The RFI has an IEH Specific CSI Code.** The RFI is sent to both AEOE as Primary Responder and IEH as Secondary Responder for response, and when applicable, the RFI is sent to other Secondary Responder(s) for comments before being returned to the AEOE for final response.

IEH Specific CSI Codes:

- 01900 Existing Premises Work
- 02081 Asbestos Abatement
- 02082 PCB-Containing Caulk Removal Work
- 02085 Exterior Paint Removal
- 02090 Environmental Mgmt of Exc Material
- 02091 Storage, Handling, Transportation and Disposal of Petroleum-Contaminated and/or Hazardous Waste
- 02115 Petroleum Bulk Storage Tank System Removal
- 02221 Sub-Slab Depressurization System
- 15414 Tests
- 15880 Sub-Slab Depressurization System Accessories

- 3. The RFI’s CSI Code is not Division G01/S01 or IEH Specific.** The RFI is sent to the AEOE for a response, and when applicable, the RFI is sent to Secondary Responder(s) for comments before being returned to the AEOE for final response.

Closures:

- 1. Bulletin Required – RFI Closed.** This response is selected when a Bulletin is required. The RFI is locked from any further revisions. The AEOE initiates a Bulletin and follows the Bulletin workflow (*See ‘Bulletin’*).
- 2. NOD Required – RFI Closed.** This response is selected when a NOD is required. The RFI is locked from any further revisions. The CM PM initiates a NOD and follows through the NOD workflow (*See ‘Notice of Direction’*).
- 3. Not Valid / Disputed.** The Primary Responder completes the RFI, which locks the record from any further revisions if the CM Firm does not dispute within 14 days. Able to Initiate Disputed NOD later.
- 4. Clarification Only.** The Primary Responder completes the RFI, which locks the record from any further revisions if the CM Firm does not dispute within 14 days.
- 5. Additional Information Required.** The Primary Responder sends RFI back to CM Firm for additional information.

When the Closure Status from the Primary Responder is Clarification Only or Not Valid, the CM Firm may dispute within 14 days. The RFI goes through the Dispute Process dependent on whether the Primary Responder is the CM PM or AEOE. If the result of the Dispute Process is the Closure Status remains Clarification Only or Not Valid, the CM Firm may request a Dispute NOD within 14 days. There is only one dispute process.

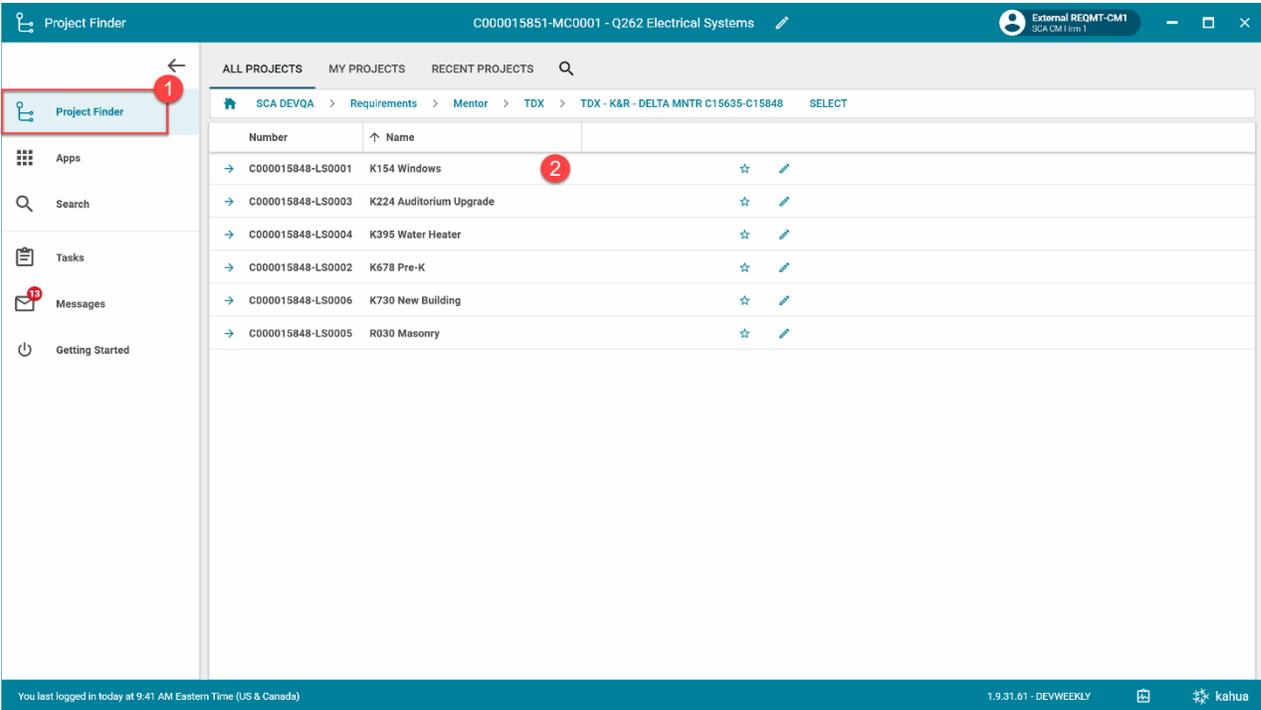
Step-by-Step Instructions

Create New RFI

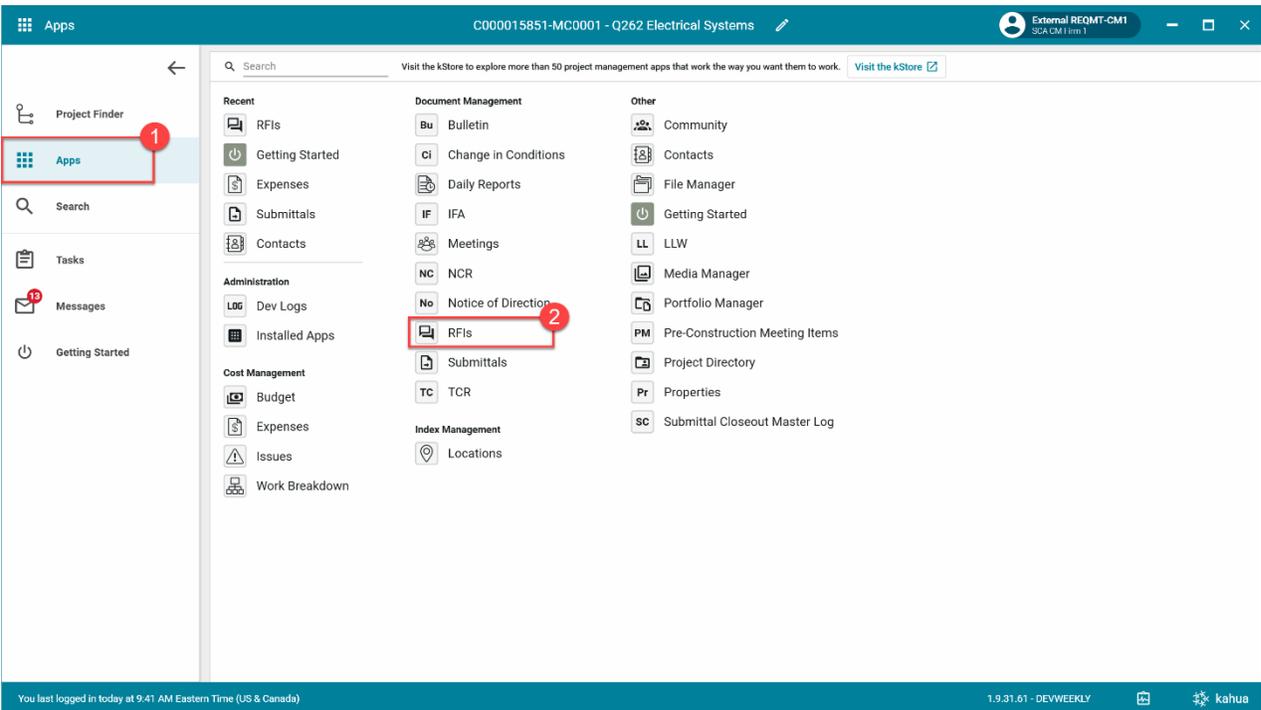
Role	Preceding Steps	Outcome
CM Firm	→ RFI information is known.	→ The RFI is created. The Issue is created and linked to the RFI.

Steps

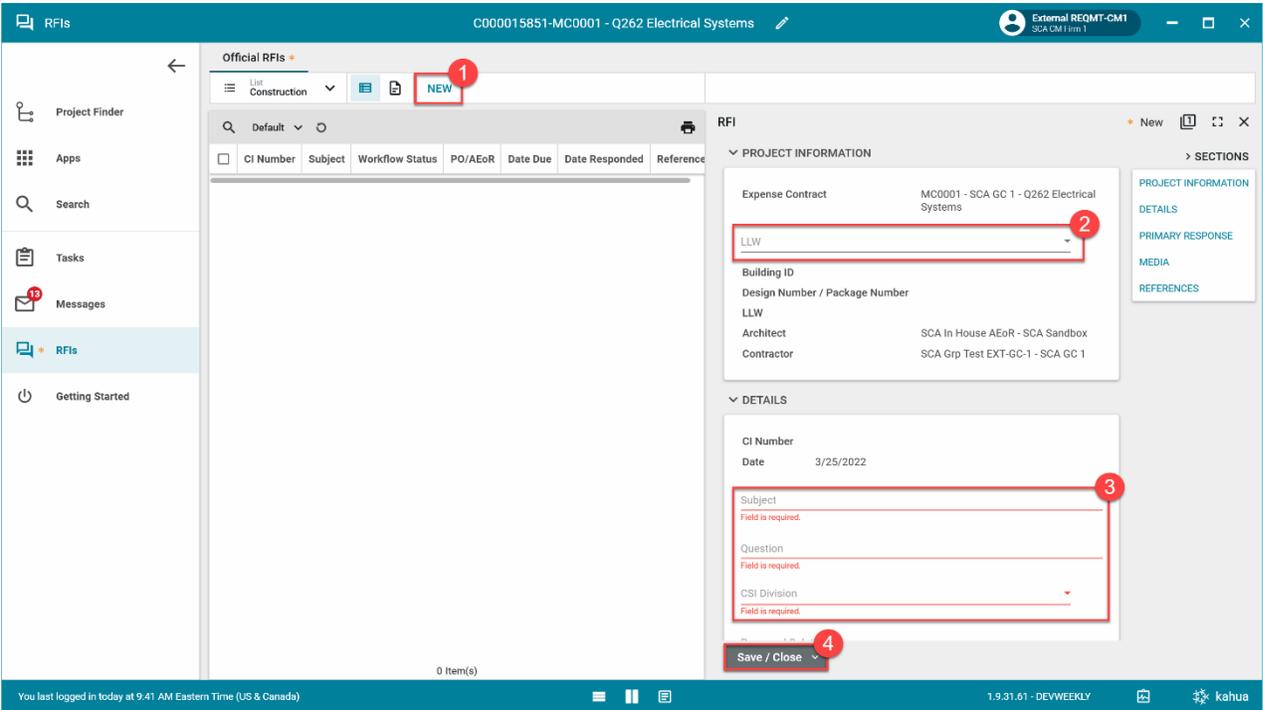
1. Go to 'Project Finder' > Select the desired Subproject/Project



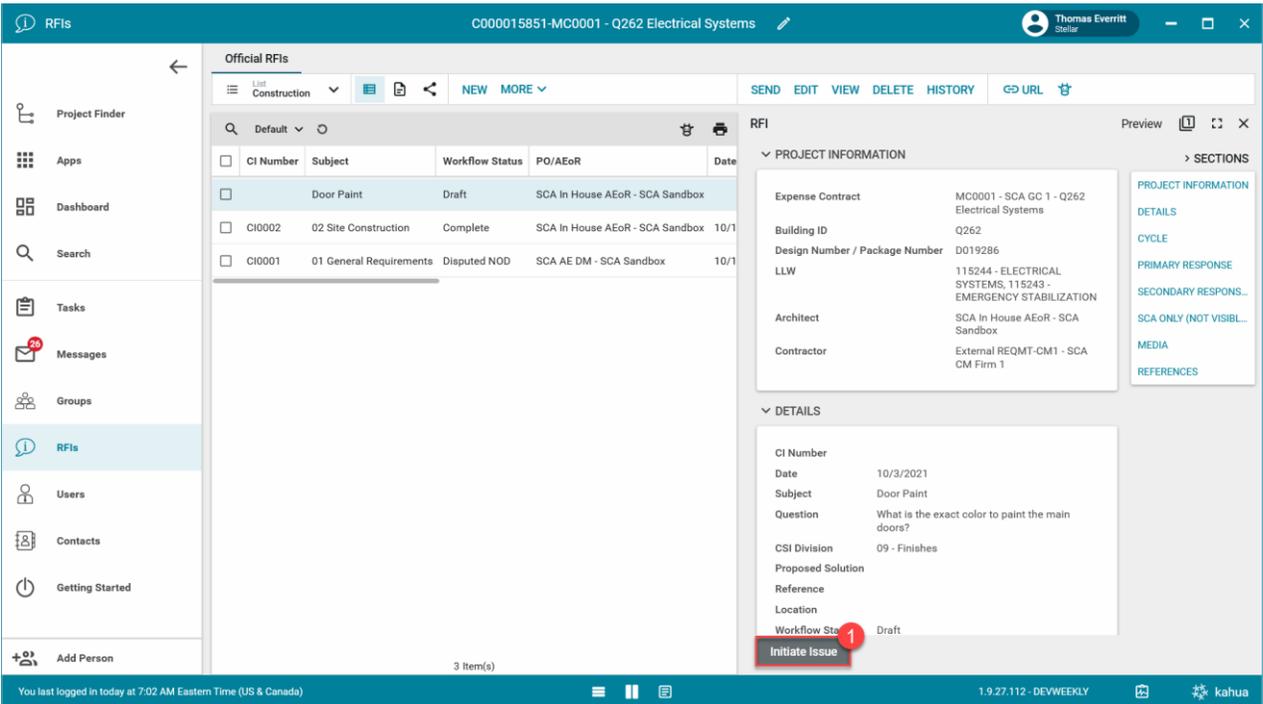
2. Go to 'Apps' > Select 'RFIs' application



3. Click 'New' > Select LLW > Enter required fields: Subject, Question, CSI Division > Click 'Save/Close'



4. Click 'Initiate Issue' > Click 'Start Processing' > Click 'Save/Close' > Click Linked RFI to return to RFI



Process

Select target partition and document type:

Source: Door Paint

Target Application: Issues

Select copies to include in references:

- PDF of Initiating document (current state) on the Destination document
- PDF of Destination document (current state) on the Initiating document

Select references to include:

Type	Description	Reference Type

Cancel Start Processing **2**

Issues C000015851-MC0001 - Q262 Electrical Systems Thomas Everitt

Issues + Issue Items

NEW

CI Number	Subject	Expense Contract	Building ID	Design Number / Package Number
CI0002	02 Site Construction	MC0001 - SCA GC 1	Q262	D019286
CI0001	01 General Requirements	MC0001 - SCA GC 1	Q262	D019286

Issue -

PROJECT INFORMATION

Expense Contract: MC0001 - SCA GC 1 - Q262 Electrical Systems

Building ID: Q262

Design Number / Package Number: D019286

LLW: 115244 - ELECTRICAL SYSTEMS, 115243 - EMERGENCY STABILIZATION

Architect: SCA In House AEoR - SCA Sandbox

Contractor: External REQMT-CM1 - SCA CM Firm 1

DETAILS

CI Number

Subject: Door Paint

Initiation Date: 10/3/2021

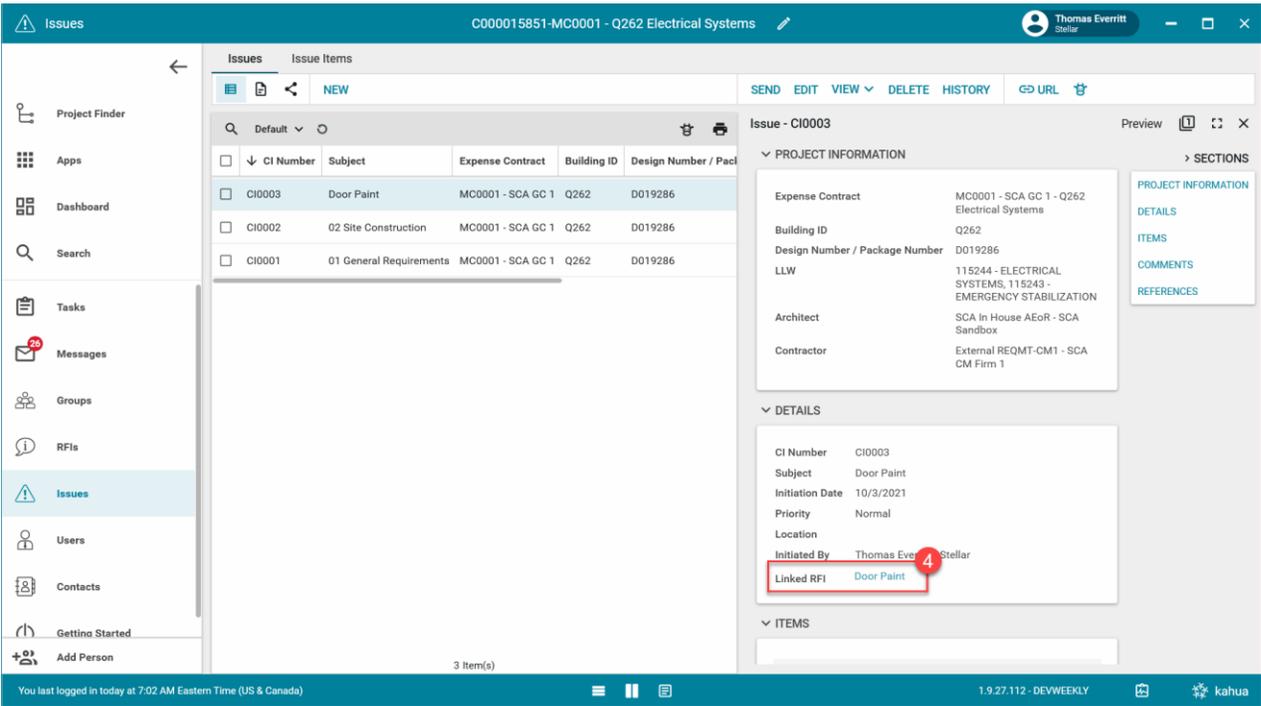
Priority: Normal

Location

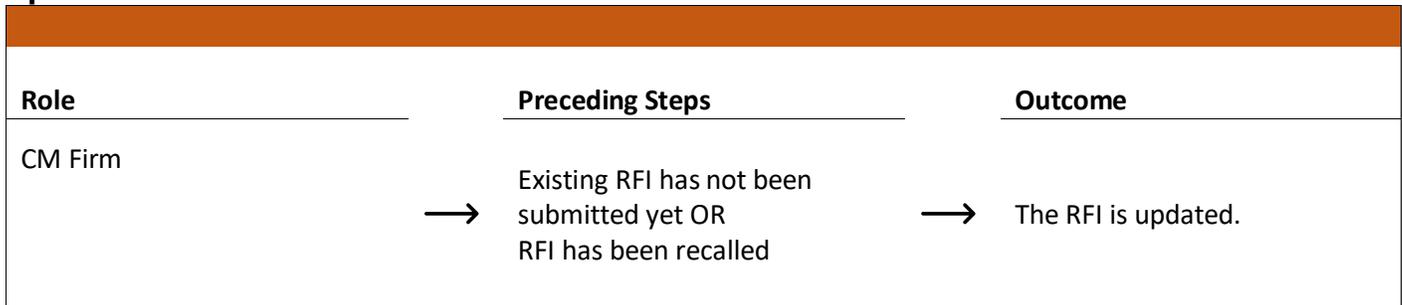
Save / Close **3**

2 Item(s)

You last logged in today at 7:02 AM Eastern Time (US & Canada) 1.9.27.112 - DEVWEEKLY kahua

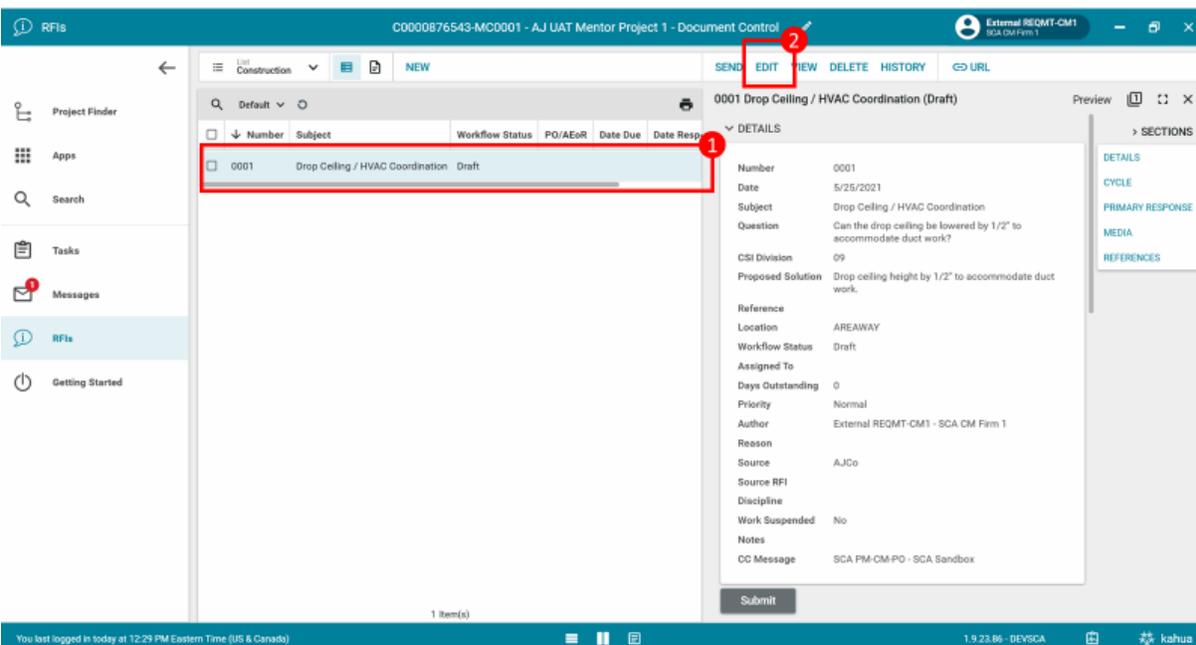


Update an RFI

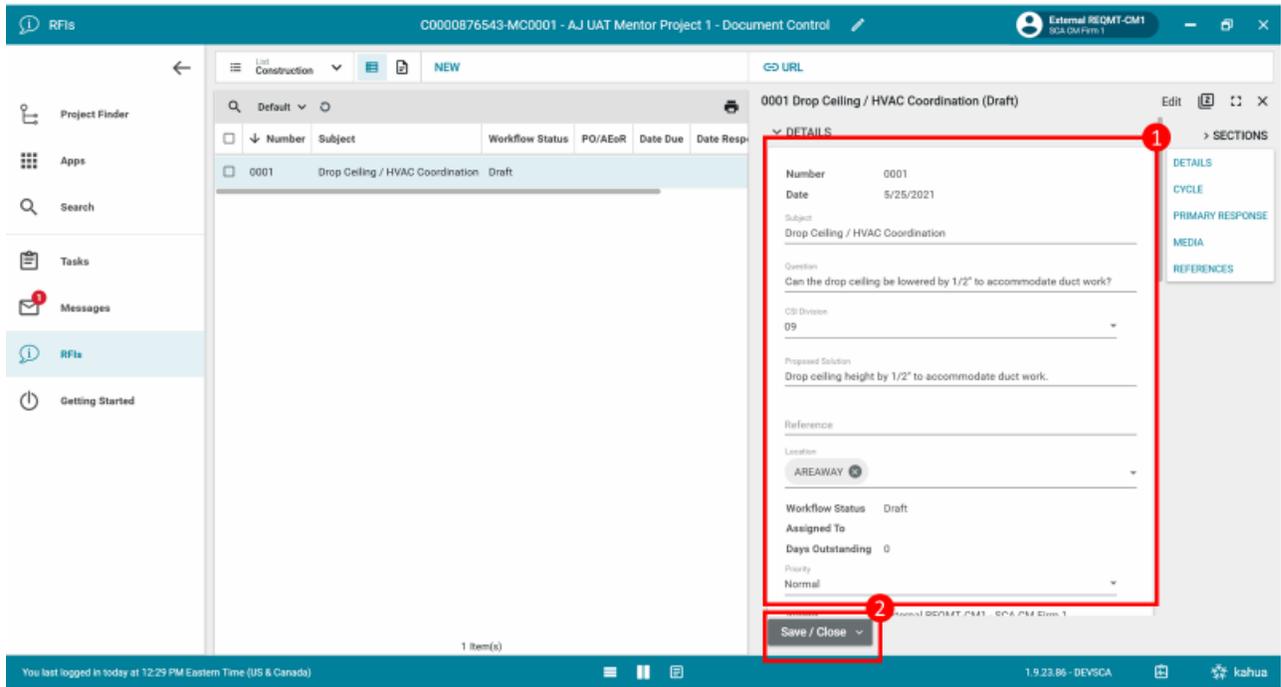


Steps

- Go to 'Project Finder' > Select Subproject/Project containing RFI > Go to 'Apps' > Select RFI App > Select RFI requiring update > Click 'Edit'



2. Update required fields > Update Secondary Responder(s) if applicable > Click 'Save/Close'

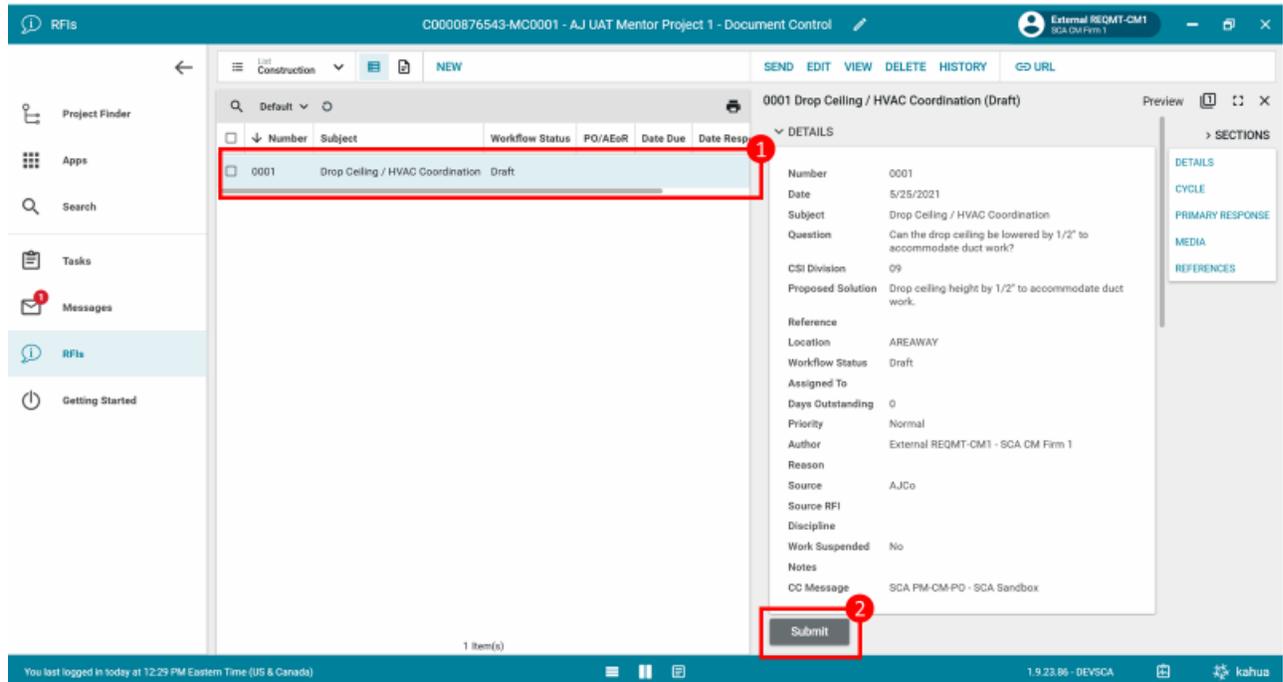


Submit for Response

Role	Preceding Steps	Outcome
	RFI has CSI Division G01/S01	<ol style="list-style-type: none"> 1. RFI is sent to CM PM for response 2. CM PM may add Secondary Responder(s) 3. AEoR is copied on all RFI correspondence
CM Firm	→ RFI's CSI Code is IEH Specific →	<ol style="list-style-type: none"> 1. RFI is sent to AEoR for response 2. IEH contact from project roster is added as Secondary Responder 3. AEoR and IEH may add Secondary Responder(s) 4. CM PM is copied on all RFI correspondence
	RFI's CSI Code is not Division G01/S01 or IEH Specific	<ol style="list-style-type: none"> 1. RFI is sent to AEoR for response 2. AEoR may Send RFI to Secondary Responder(s) 3. CM PM is copied on all RFI correspondence

Steps

1. Go to 'Project Finder' > Select Subproject/Project containing RFI > Go to 'Apps' > Select 'RFIs' application > Select RFI requiring submission > Click 'Submit'

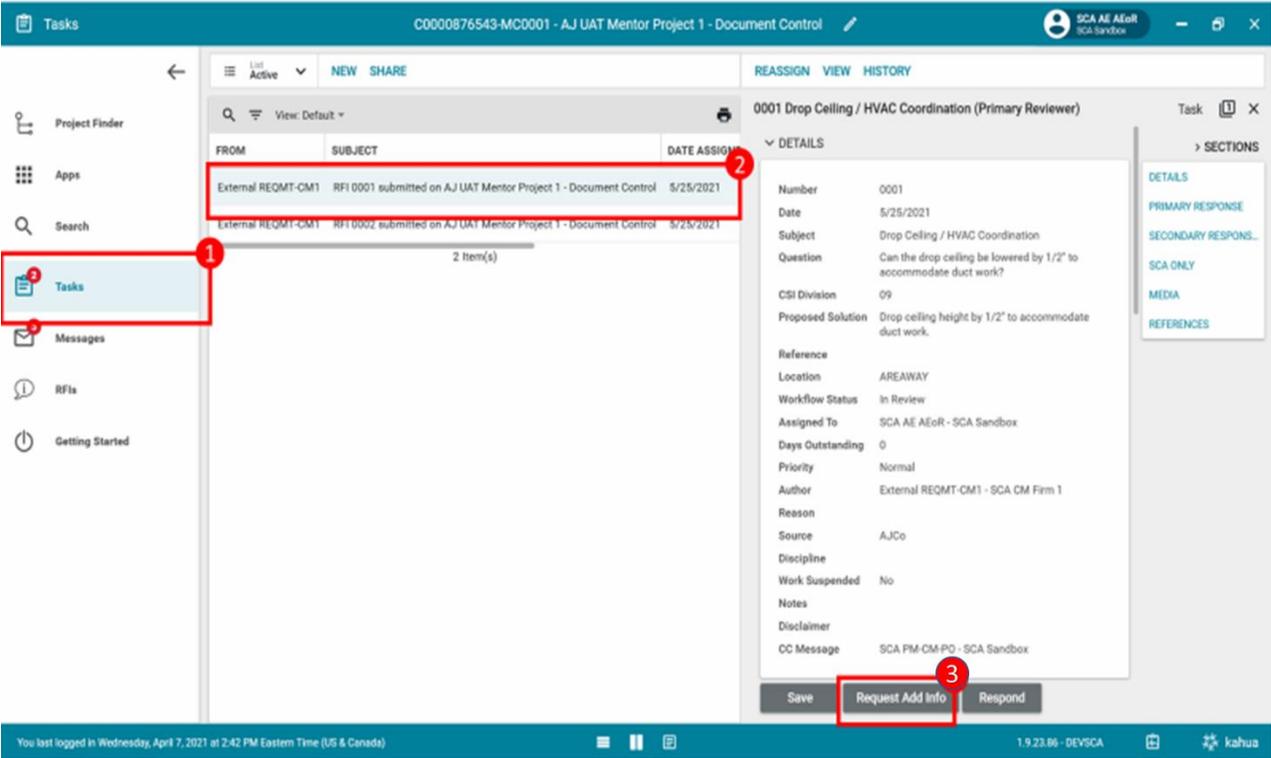


Primary Responder – Request Additional Information

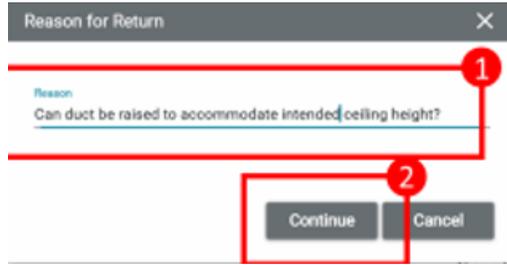
Role	Preceding Steps	Outcome
Primary Responder	RFI is submitted to Primary Responder. Primary Responder needs additional information from Submitter.	1. CM Firm receives message indicating RFI was returned for clarification with reason 2. CM Firm must submit RFI to restart workflow

Steps

1. Go to 'Tasks' > Click on RFI task requiring response > Click 'Request Add Info'



2. Enter 'Reason for Return' in pop-up window > Click 'Continue'

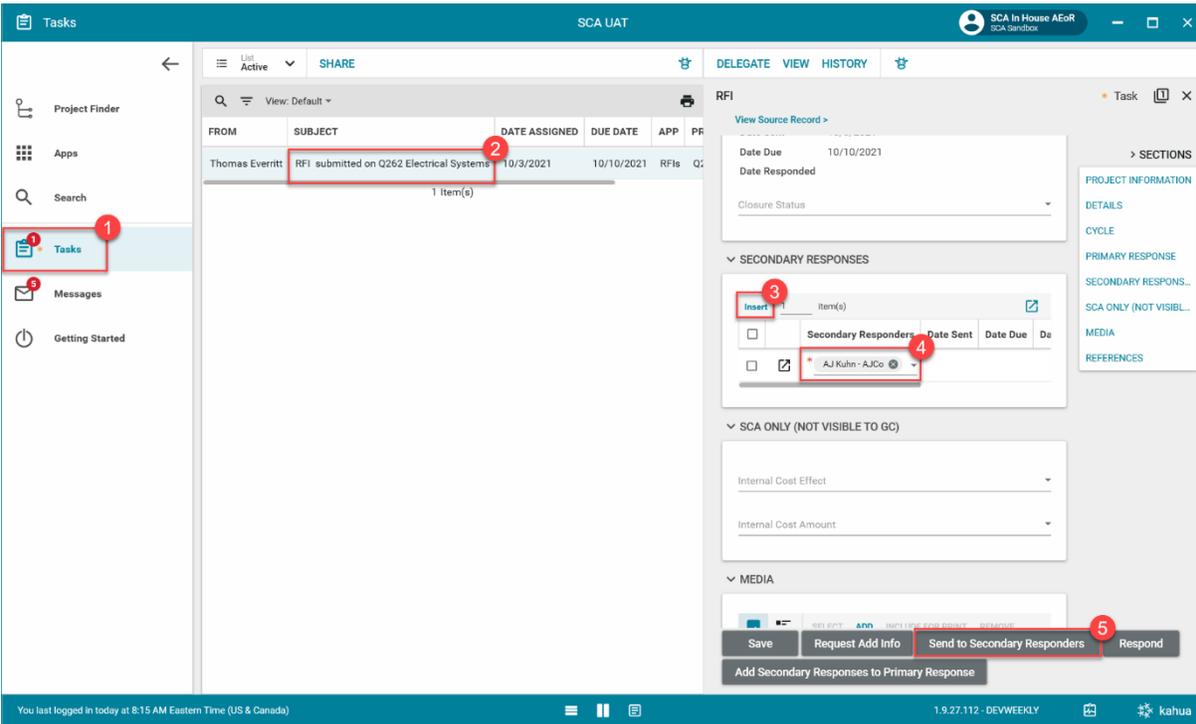


Primary Responder – Send to Secondary Responder

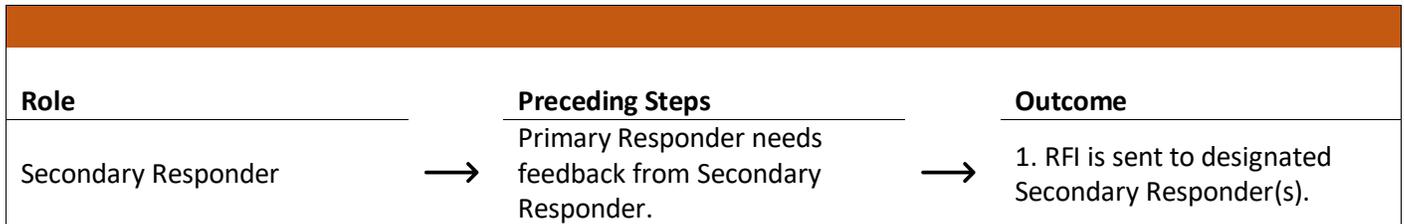
Role	Preceding Steps	Outcome
Primary Responder	Primary Responder receives RFI for a response Primary Responder needs feedback from Secondary Responder	1. RFI is sent to designated Secondary Responder(s)

Steps

1. Go to 'Tasks' > Click on Task > In 'SECONDARY RESPONSES' section, click 'Insert' and select Secondary Responder(s) > Click 'Send to Secondary Responders'

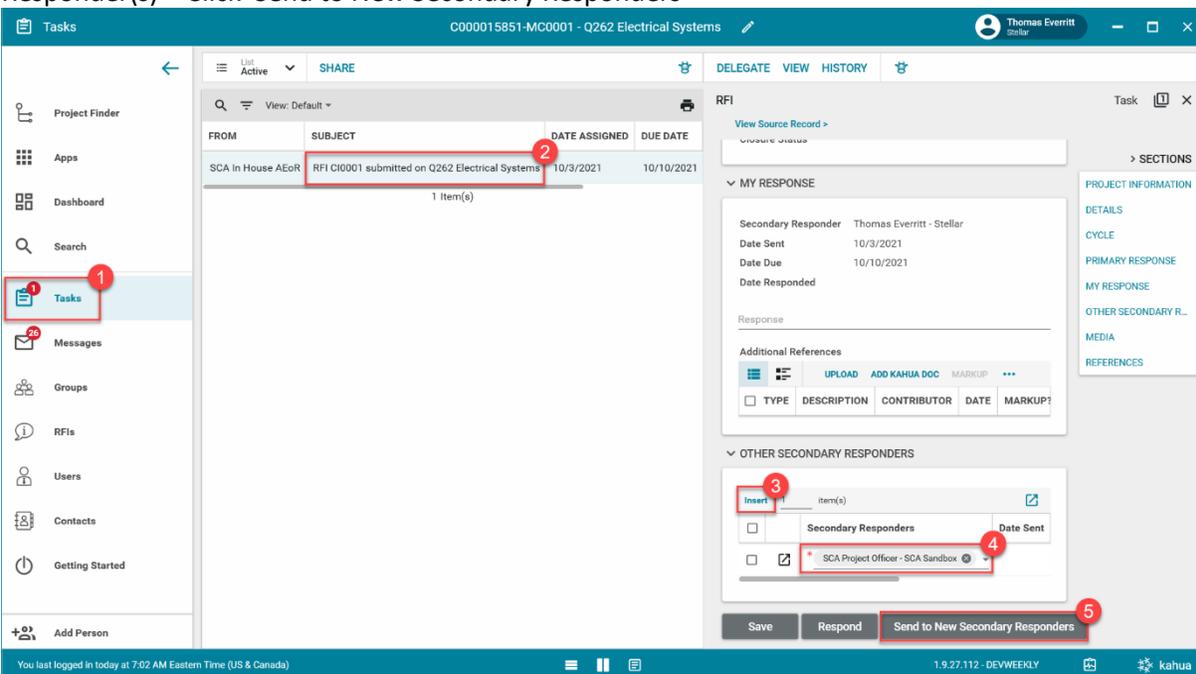


Secondary Responder – Send to Additional Secondary Responder(s)



Steps

1. Go to 'Tasks' > Click on Task > In 'OTHER SECONDARY RESPONSES' section, click 'Insert' and select Secondary Responder(s) > Click 'Send to New Secondary Responders'



Secondary Responder – Respond to RFI

Role	Preceding Steps	Outcome
Secondary Responder	RFI has been sent to Secondary Responder for a response.	<ol style="list-style-type: none"> Response provided to Primary Responder. Primary Response has ability to add Secondary Response to Primary Response

Steps

- Go to 'Tasks' > Click on Task > Enter Response > Click 'Respond'

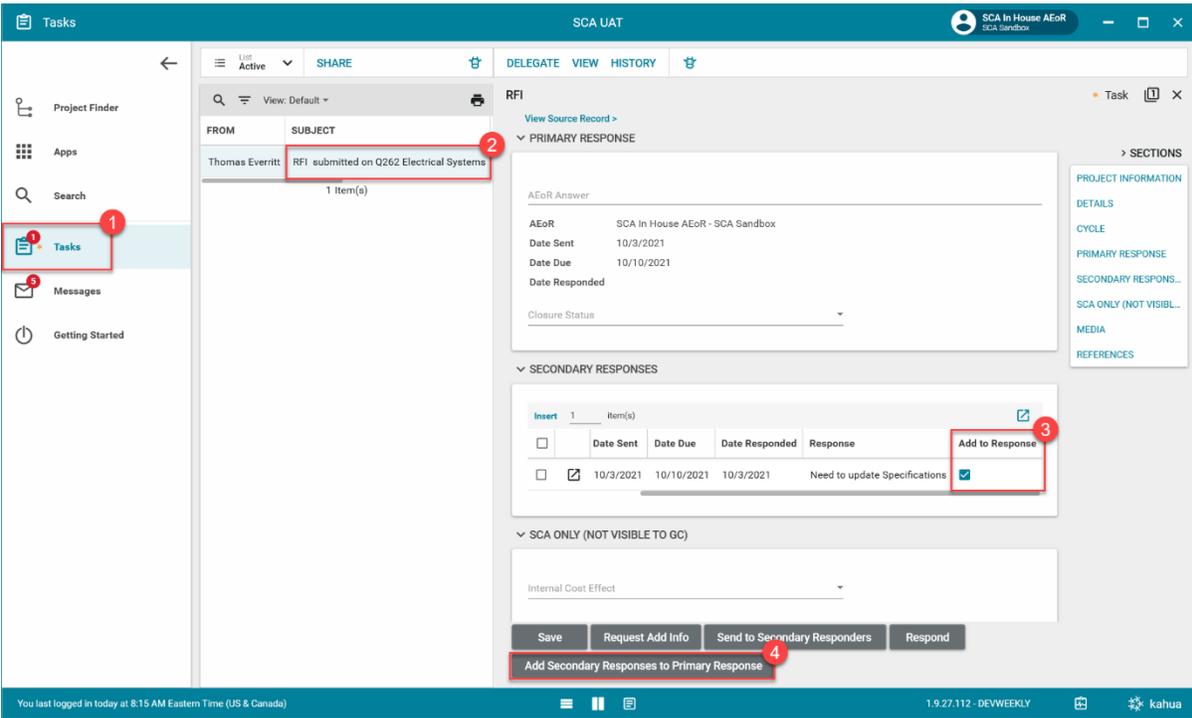
The screenshot displays the Kahua software interface. On the left sidebar, the 'Tasks' menu item is highlighted with a red box and a red circle containing the number '1'. The main content area shows a table of tasks with columns 'FROM', 'SUBJECT', 'DATE ASSIGNED', and 'DUE DATE'. One row is highlighted in red with a red circle containing the number '2'. The 'RFI' details panel is open on the right, showing the 'MY RESPONSE' section. The response text 'Need to update Specifications' is highlighted with a red box and a red circle containing the number '3'. At the bottom of the panel, the 'Respond' button is highlighted with a red box and a red circle containing the number '4'.

Primary Responder – Add Secondary Responses to Primary Response

Role	Preceding Steps	Outcome
Primary Responder	RFI has been sent to Secondary Responder(s) for feedback. Secondary Responder(s) responded to Primary Responder.	Secondary Response is recorded in the primary answer field.

Steps

- Go to 'Tasks' > Click on RFI with Secondary Response > In 'Secondary Responses' section, select the check box in column 'Add to Response' on the line(s) containing the Secondary Response(s) > Click 'Add Responses to Primary Response'

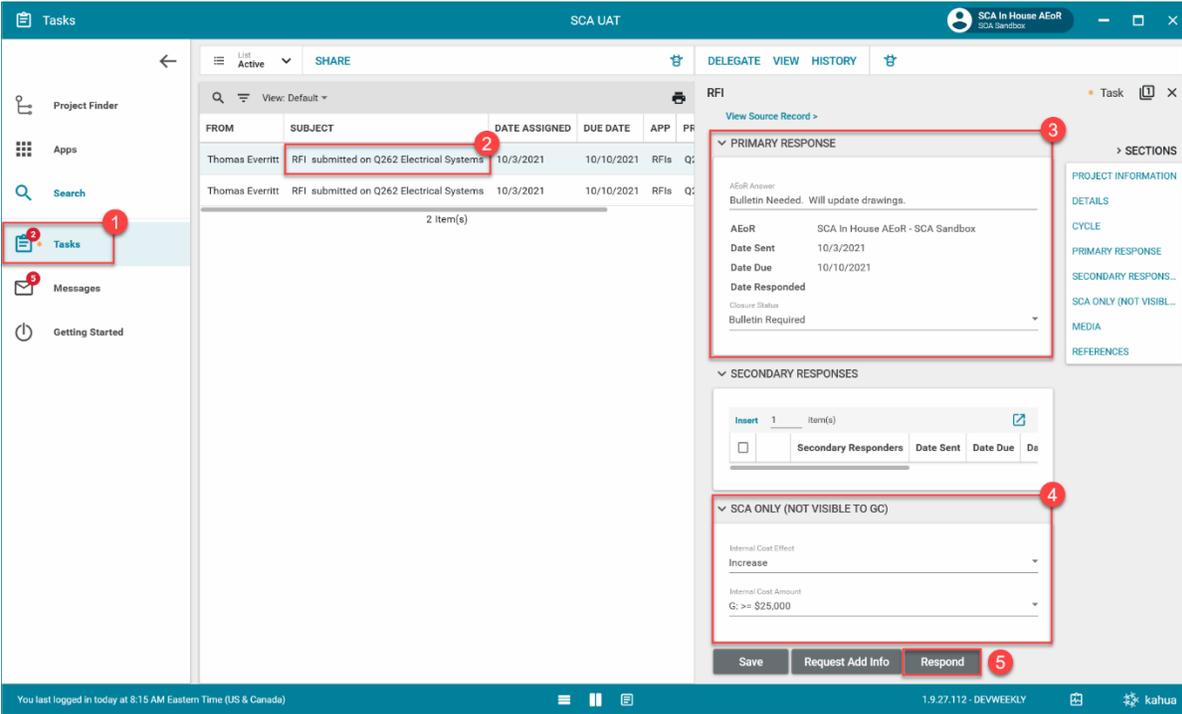


Primary Responder – Respond to RFI

Role	Preceding Steps	Outcome
Primary Responder	RFI is submitted to Primary Responder.	<ol style="list-style-type: none"> 1. Response provided to CM Firm. 2. Bulletin Initiated if Response is Bulletin Required and the RFI is closed. 3. NOD Initiated if Response is NOD Required and the RFI is closed. 4. CM Firm may dispute RFI Response of Clarification Only or Not Valid within 14 days.

Steps

1. Go to 'Tasks' > Click on Task > Enter 'Answer' and select 'Closure Status' in 'PRIMARY RESPONSE' section > **Bulletin Required/ Clarification Only Case:** Optional 'Internal Cost Effect' and 'Internal Cost Amount' **Not Valid: Disputed / Additional Information Required Case:** 'Internal Cost Effect' and 'Internal Cost Amount' **NOD Required Case:** Select 'Internal Cost Effect' and 'Internal Cost Amount' and 'Reason Code' > Click 'Respond'

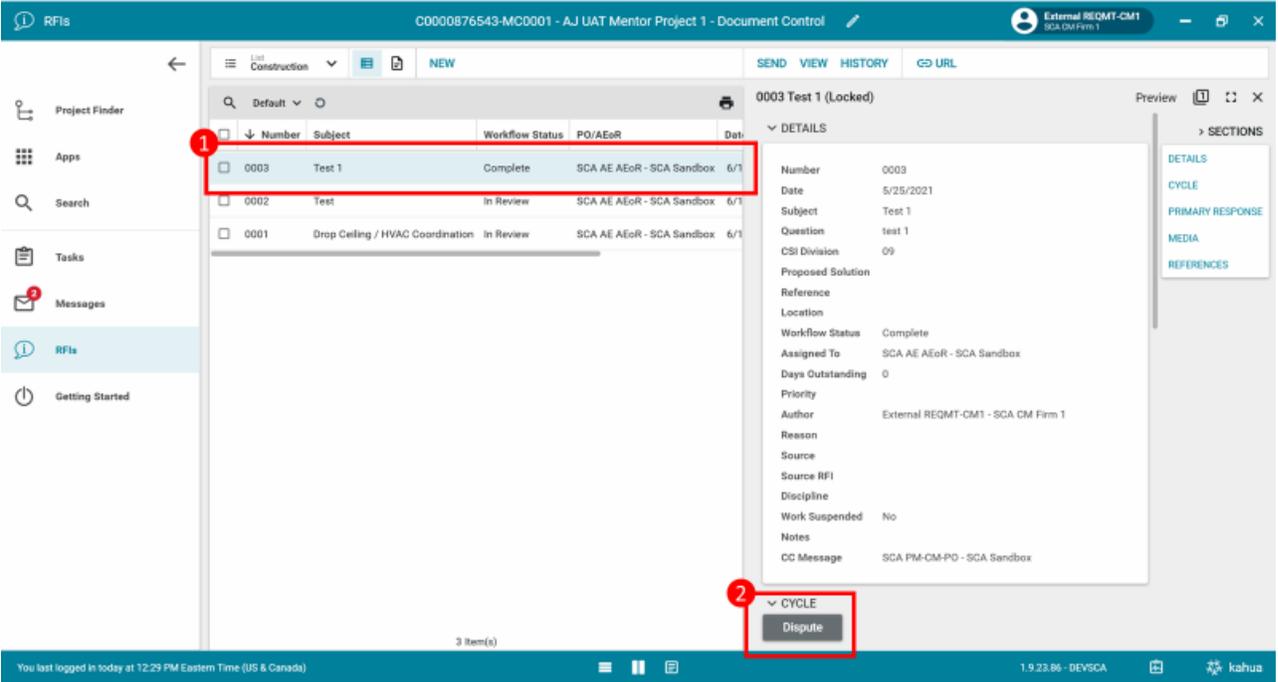


Dispute RFI Response

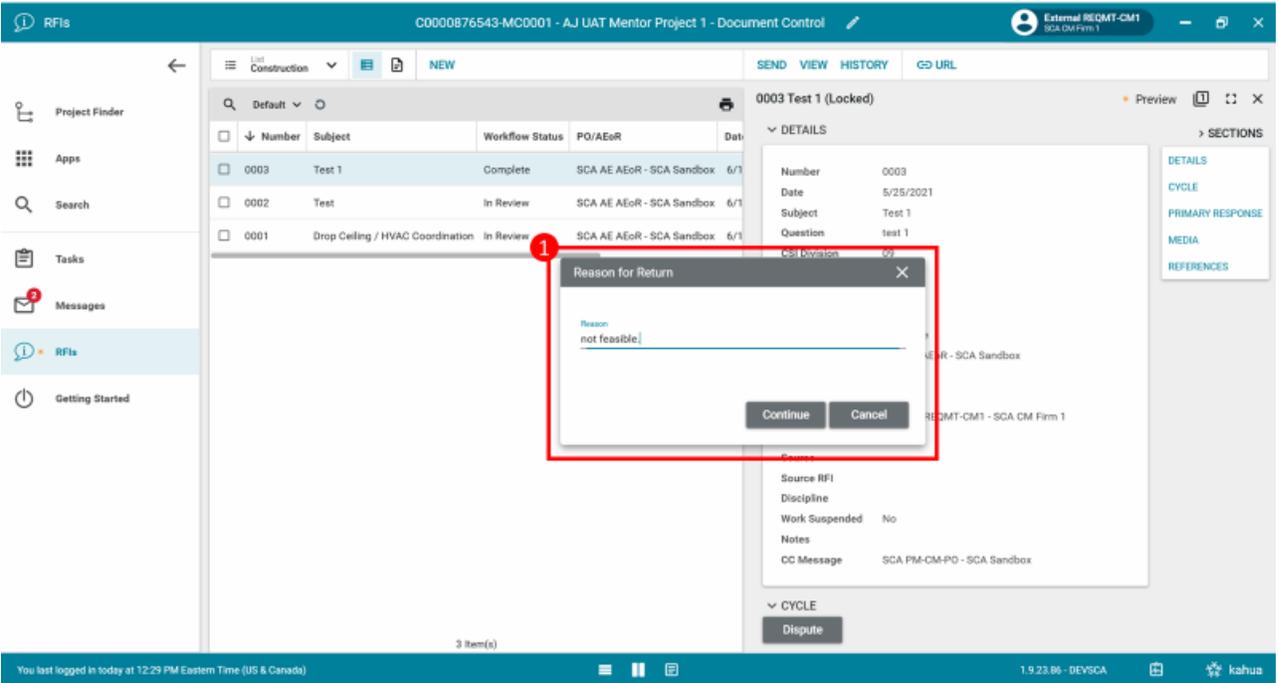
Role	Preceding Steps	Outcome
CM Firm	<p>CM Firm wishes to dispute RFI Response.</p> <p>→ RFI Response is Clarification Only or Not Valid Within 14 days of Response</p>	<p>1. Dispute of Div G01, S01 Response is sent to the SPO for Dispute Response</p> <p>→ 2. Dispute of non-Div G01, S01 Response sent to the A&E DM for Dispute Response</p>

Steps

1. Go to 'Project Finder' > Select Subproject/Project containing RFI > Go to 'Apps' > Select 'RFIs' application > Select RFI requiring dispute > Click 'Dispute'



2. Enter 'Reason' in pop-up window > Click 'Continue'



Respond to Disputed RFI

Role	Preceding Steps	Outcome
Dispute Primary Responder	→ CM Firm disputes RFI Response.	→ 1. Provides Response to the Dispute. 2. If the RFI Dispute is Complete with a Response of Clarification Only or Not Valid, the CM Firm has 14 days to request a Disputed NOD

Steps

- Go to 'Tasks' > Click on Task > Enter 'Response to Dispute' and select 'Closure Status' in 'PRIMARY RESPONSE' section > **Bulletin Required/ Clarification Only Case:** Optional 'Internal Cost Effect' and 'Internal Cost Amount' **Not Valid: Disputed / Additional Information Required Case:** Select 'Internal Cost Effect' and 'Internal Cost Amount' **NOD Required Case:** Select 'Internal Cost Effect', 'Internal Cost Amount', and 'Reason Code' > Click 'Respond'

The screenshot displays the SCA DEVQA application interface. On the left, the 'Tasks' sidebar is highlighted with a red box and a '1'. The main content area shows a table of tasks with columns for 'FROM', 'SUBJECT', 'DATE ASSIGNED', 'DUE DATE', 'APP', and 'PR'. A task is highlighted with a red box and a '2'. The right-hand pane shows the details of the selected RFI, including the 'PRIMARY RESPONSE' section with a red box and a '3', the 'SECONDARY RESPONSES' section, and the 'SCA ONLY (NOT VISIBLE TO GC)' section with a red box and a '4'. At the bottom right, the 'Respond' button is highlighted with a red box and a '5'. The interface also includes a top navigation bar with 'Tasks', 'SCA DEVQA', and user information, and a bottom status bar with login and system information.

Additional Actions to Respond to Disputed RFI

Role	Preceding Steps	Outcome
Dispute Primary Responder	→ CM Firm disputes RFI Response.	→ 1A. CM Firm receives message indicating RFI was returned for clarification with reason 1B. CM Firm must submit RFI to restart workflow OR 2. RFI is sent to designated Secondary Responder(s)

Steps

Click 'Request Add Info' *For Steps and Screenshots, see section on Primary Responder – Request Additional Information

OR

Click 'Send to Secondary Responders' * For Steps and Screenshots, see section on Primary Responder – Send to Secondary Responder

Request Add Info

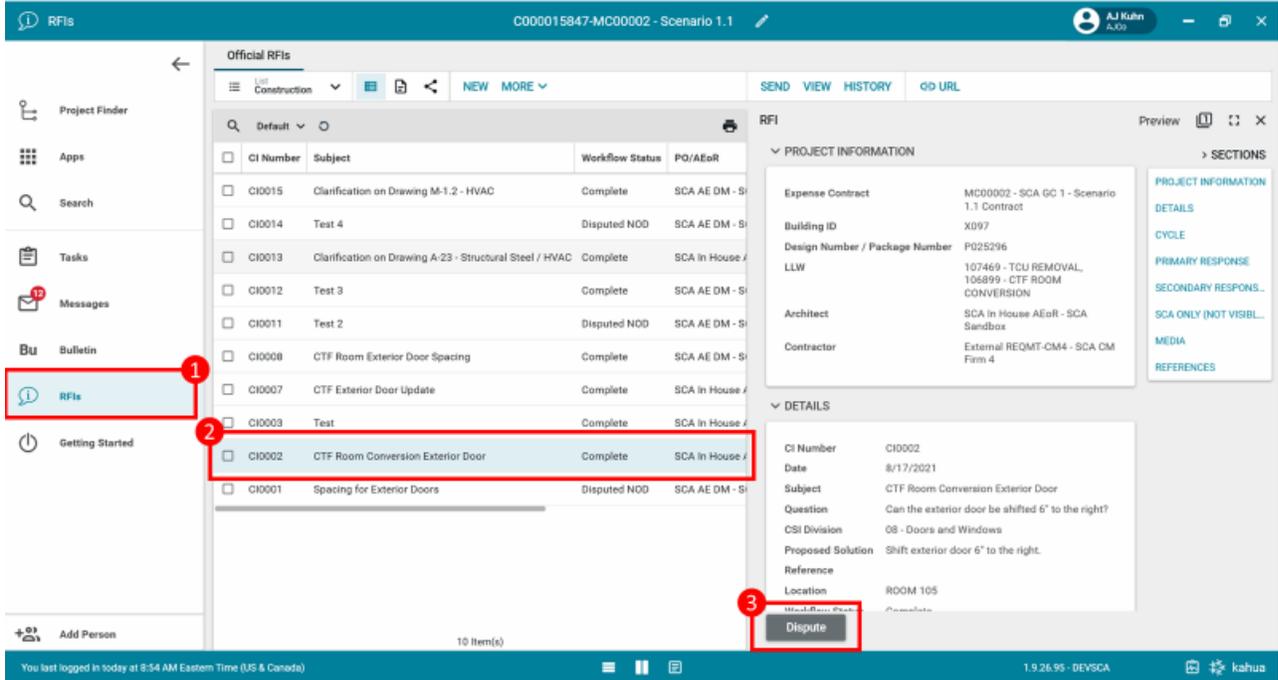
Send to Secondary Responders

Request NOD Dispute Process

Role	Preceding Steps	Outcome
CM Firm	→ CM Firm wishes to dispute the Dispute Response. RFI Response is Clarification Only or Not Valid. Within 14 days of Dispute Response.	→ 1. Disputed NOD is requested 2. CM PM initiates Disputed NOD

Steps

1. Go to 'Project Finder' > Select Subproject/Project containing RFI > Go to 'Apps' Select 'RFIs' application > Select RFI > Click 'Dispute'



Initiate Bulletin, NOD, or Disputed NOD

Role	Preceding Steps	Outcome
AEoR (Bulletin)	RFI Response is Bulletin Required or NOD Required.	1A. AEoR initiates Bulletin OR
CM PM (NOD and Disputed NOD)	OR CM Firm requests Disputed NOD.	1B. CM PM initiates NOD or Disputed NOD

Steps

1. Go to 'Project Finder' > Select Subproject/Project containing RFI > Go to 'Apps' Select 'RFIs' application > Select RFI > Click 'Initiated Dispute NOD'

Notes:

- **Initiate Disputed NOD steps and screenshots are provided. The process to initiate a Bulletin or NOD are the same.**
- **See Notice of Direction Training Guide for further instruction.**

The screenshot shows the RFI application interface. On the left is a navigation sidebar with 'RFIs' highlighted. The main area displays a table of 'Official RFIs' with columns for CI Number, Subject, Workflow Status, PO/AEoR, and Date. The row for CI0001 '01 General Requirements' with status 'Disputed NOD' is selected and highlighted. A red box with a '2' points to this row. To the right, the 'RFI' details pane is open, showing 'PROJECT INFORMATION' and 'DETAILS'. A red box with a '3' points to the 'Initiate Disputed NOD' button at the bottom of the details pane. A red box with a '1' points to the 'RFIs' icon in the sidebar.

2. Click 'Start Processing'

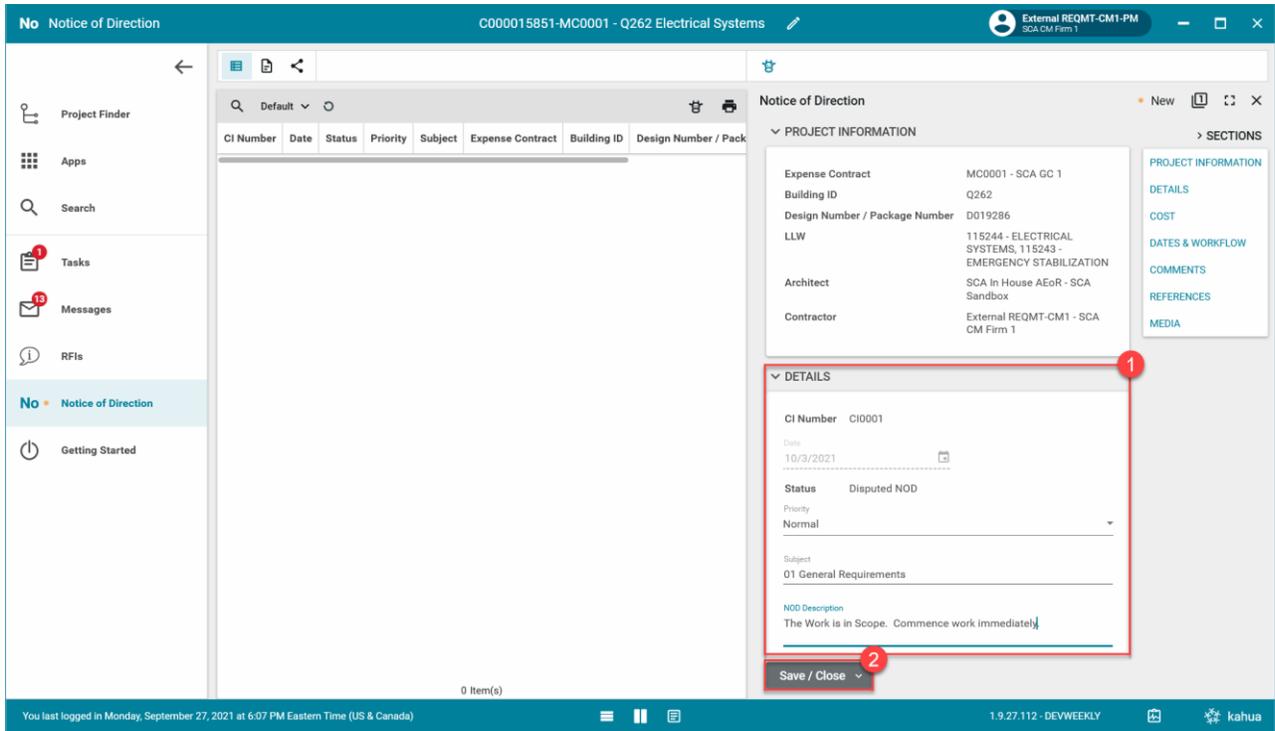
The 'Process' dialog box is shown with the following fields and options:

- Select target partition and document type:**
 - Source: 01 General Requirements
 - Target Application: Notice of Direction
- Select copies to include in references:**
 - PDF of Initiating document (current state) on the Destination document
 - PDF of Destination document (current state) on the Initiating document
- Select references to include:**

Type	Description	Reference Type
------	-------------	----------------

At the bottom right, there are 'Cancel' and 'Start Processing' buttons. A red box with a '1' points to the 'Start Processing' button.

3. Update Details for NOD > Click 'Save/Close'



Recall RFI



Steps

1. Select the desired RFI > Select 'Recall' > Enter the recall reason > Select 'Continue'

