

# **RFIs Training Guide (Mentor)**

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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.

# Workflow Diagram

Request for Information



# **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 AEoR 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 AEoR 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 AEoR for a response, and when applicable, the RFI is sent to Secondary Responder(s) for comments before being returned to the AEoR 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 AEOR 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 AEoR. 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

# Role Preceding Steps Outcome CM Firm → RFI information is known. → The RFI is created.

### Steps

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

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

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

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

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## Update an RFI

Role	Preceding Steps		Outcome
CM Firm	Existing RFI has not been submitted yet OR RFI has been recalled	$\rightarrow$	The RFI is updated.

### Steps

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

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



### Submit for Response

Role	Preceding Stens	Quitcome
	RFI has CSI Division G01/S01	<ol> <li>RFI is sent to CM PM for response</li> <li>CM PM may add Secondary Responder(s)</li> <li>AEoR is copied on all RFI correspondence</li> </ol>
CM Firm →	RFI's CSI Code is IEH Specific →	<ol> <li>RFI is sent to AEoR for response</li> <li>IEH contact from project roster is added as Secondary Responder</li> <li>AEoR and IEH may add Secondary Responder(s)</li> <li>CM PM is copied on all RFI correspondence</li> </ol>
	RFI's CSI Code is not Division G01/S01 or IEH Specific	<ol> <li>RFI is sent to AEoR for response</li> <li>AEoR may Send RFI to Secondary Responder(s)</li> <li>CM PM is copied on all RFI correspondence</li> </ol>

### Steps

 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
	RFI is submitted to Primary	1. CM Firm receives message
	Responder.	indicating RFI was returned for
Primary Responder	Primary Responder needs	→ clarification with reason
	additional information from	2. CM Firm must submit RFI to
	Submitter.	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'

Reason for Return		
Reason		
Can duct be raised to acc	ommodate intended ceiling	g height?
		2
	Continue	Cancel
	Conunue	Gancer

### Primary Responder – Send to Secondary Responder

Role	Preceding Steps	Outcome
Primary Responder —	<ul> <li>Primary Responder receives</li> <li>RFI for a response</li> <li>Primary Responder needs</li> <li>feedback from Secondary</li> <li>Responder</li> </ul>	→ 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'

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### Secondary Responder – Send to Additional Secondary Responder(s)

Role		Preceding Steps		Outcome
Secondary Responder	$\rightarrow$	Primary Responder needs feedback from Secondary Responder.	$\rightarrow$	1. RFI is sent to designated 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'



Role		Preceding Steps		Outcome
Secondary Responder	$\rightarrow$	RFI has been sent to Secondary Responder for a response.	$\rightarrow$	<ol> <li>Response provided to Primary Responder.</li> <li>Primary Response has ability to add Secondary Response to Primary Response</li> </ol>

### Steps

1. Go to 'Tasks' > Click on Task > Enter Response > Click 'Respond'

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### 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.	$\rightarrow$	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	$\rightarrow$	RFI is submitted to Primary Responder.	$\rightarrow$	<ol> <li>Response provided to CM</li> <li>Firm.</li> <li>Bulletin Initiated if Response is Bulletin Required and the RFI is closed.</li> <li>NOD Initiated if Response is NOD Required and the RFI is closed.</li> <li>CM Firm may dispute RFI Response of Clarification Only or Not Valid within 14 days.</li> </ol>

### Steps

 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 Ste	ps	Outcome
	CM Firm wish	es to dispute RFI	1. Dispute of Div G01, S01 Response is sent to the SPO for
CM Firm	RFI Response Only or Not Va Within 14 day	alid s of Response →	2. Dispute desponse 2. Dispute of non-Div G01, S01 Response sent to the A&E DM for Dispute Response

### 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'

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### **Respond to Disputed RFI**



### 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'



### Additional Actions to Respond to Disputed RFI



### 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	Pre	ceding Steps		Outcome
	CM	Firm wishes to dispute the	-	1. Disputed NOD is requested
	Dis	pute Response.		2. CM PM initiates Disputed
CM Firm	RFI	RFI Response is Clarification		NOD
	On On	ly or Not Valid.		
	Wi	thin 14 days of Dispute		
	Res	sponse.		

### Steps

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

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Q	Search			CI0015	Cla	rificati	on on	Drawin	9 M-1.	2 - HVAC		Complete	SCA AE DM - S		Expense Cor	ntract			MC00002 - SCA GC 1 - Scenario		PROJECT	INFOR	MATION
`				CI0014	Tei	it 4						Disputed NOD	SCA AE DM - S		Building ID				X097		CYCLE		
Ê	Tasks			CI0013	Cla	rificati	on on	Drawin	A-23	- Structural	Steel / HVAC	Complete	SCA In House /		Design Numl	ber / Pac	ckage f	lumber	P025296 107469 - TCU REMOVAL,		PRIMARY	RESPO	INSE
æ	Messanes			CI0012	Tes	it 3						Complete	SCA AE DM - S						106899 - CTF ROOM CONVERSION		SECONDA	RY RES	SPONS
				CI0011	Ter	rt 2						Disputed NOD	SCA AE DM - S		Architect				SCA In House AEoR - SCA Sandbox		SCA ONLY	(NOT)	VISIBL
Bu	Bulletin			C10008	СТ	F Roor	n Exter	tior Doc	r Spac	cing		Complete	SCA AE DM - S		Contractor				External REQMT-CM4 - SCA CM Firm 4		REFEREN	CES	
ø	RFIs	٦		CI0007	ст	F Exter	ior Do	or Updi	đe			Complete	SCA In House /				_			-			_
-		_		CI0003	Tes	it						Complete	SCA in House A		V DETAILS								
0	Getting Started			C10002	СТ	F Roor	n Conv	ersion	Exterio	or Door		Complete	SCA In House /	L	CI Number		C10003	2					
				CI0001	Spa	ecing f	or Exte	erior De	ors			Disputed NOD	SCA AE DM - S		Subject		CTF R	oorn Cor	version Exterior Door				
			-			-	-				_				Question CRI Division		Can th	e exteric	r door be shifted 6" to the right? Windows				
															Proposed So	olution	Shift e	xterior d	oor 6" to the right.				
															Reference								
													•	3	Location West-Res. Pa		ADON Come	105					
+23	Add Person									10 Item(s)					Dispute								
You la	st logged in today at 8:	54 AM Easter	n Time	(US & Canada	a)							= 11	E						1.9.26.95 - DEVSCA		Ē	棱	kahua

# 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)	$\rightarrow$	OR CM Firm requests Disputed NOD.	$\rightarrow$	1B. CM PM initiates NOD or Disputed NOD

### Steps

 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.



2. Click 'Start Processing'

Proces	S			×
Selec	ct target partition and doc	iment type:		
Sour	Source 01 General Requirements			
Target Notic	t Application ce of Direction			
Sele	ct copies to include in refe	rences:		
	PDF of Initiating docume	nt (current state) on the Destination document		
	PDF of Destination docur	nent (current state) on the Initiating document		
Selee	ct references to include:			
	Туре	Description	Reference Type	
			1	
			Cancel Start Processin	<b>1</b>

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

No Notice of Direction	C000015851-MC0001 - Q262 Electrical Systems 🧪 😌 External REQMT-CM1-PM	- 🗆 ×
←	■ D < *	
Project Finder	Q Default ∽ O 甘 ➡ Notice of Direction	New 🗓 🖸 🗙
Ĵ	CI Number Date Status Priority Subject Expense Contract Building ID Design Number / Pack    PROJECT INFORMATION	> SECTIONS
Apps	Expense Contract MC0001 - SCA GC 1 Building ID 0262	PROJECT INFORMATION
Q Search	Design Number / Package Number D019286	COST
Tasks	LLW 115244 - ELECTRICAL SYSTEMS, 115243 - EMERGENCY STABILIZATION	DATES & WORKFLOW
 ,	Architect SCA In House AEOR - SCA Sandbox	REFERENCES
Messages	Contractor External REQMT-CM1 - SCA CM Firm 1	MEDIA
j) RFIs	v details	
No * Notice of Direction	Ci Number Ci0001	
Getting Started	Data 10/3/2021	
	Status Disputed NOD	
	Priority	
	Normal	
	Subject 0.1 Concern Denvironments	
	N00 Description The Work is in Scope. Commence work immediately,	
	0 Item(s)	
You last logged in Monday, September 27	, 2021 at 6:07 PM Eastern Time (US & Canada) 🗮 📗 🗐 1.9.27.112 - DEVWEEKLY	🖾 🛱 kahua

### **Recall RFI**

Role	 Preceding Steps	_	Outcome
AEoR, PO, AE DM, SPO,	 The DEI has been submitted		DEL roturns to the CM Firm
Admin/Moderator	The Kri has been submitted.		REFITETUTIES to the CIVI FITTI.

### Steps

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

