



Mentor Bulletin User Guide

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About

The AEOB creates a Bulletin to provide design and engineering direction. A Bulletin may be created independently or when an RFI's Closure Status is Bulletin Required.

Process Overview

While the Bulletin 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.

While a Bulletin may be created directly by the AEOB, a Bulletin is typically created when the Primary Responder completes an RFI with a decision that a Bulletin is required. Then, the AEOB processes the RFI to create a Bulletin.

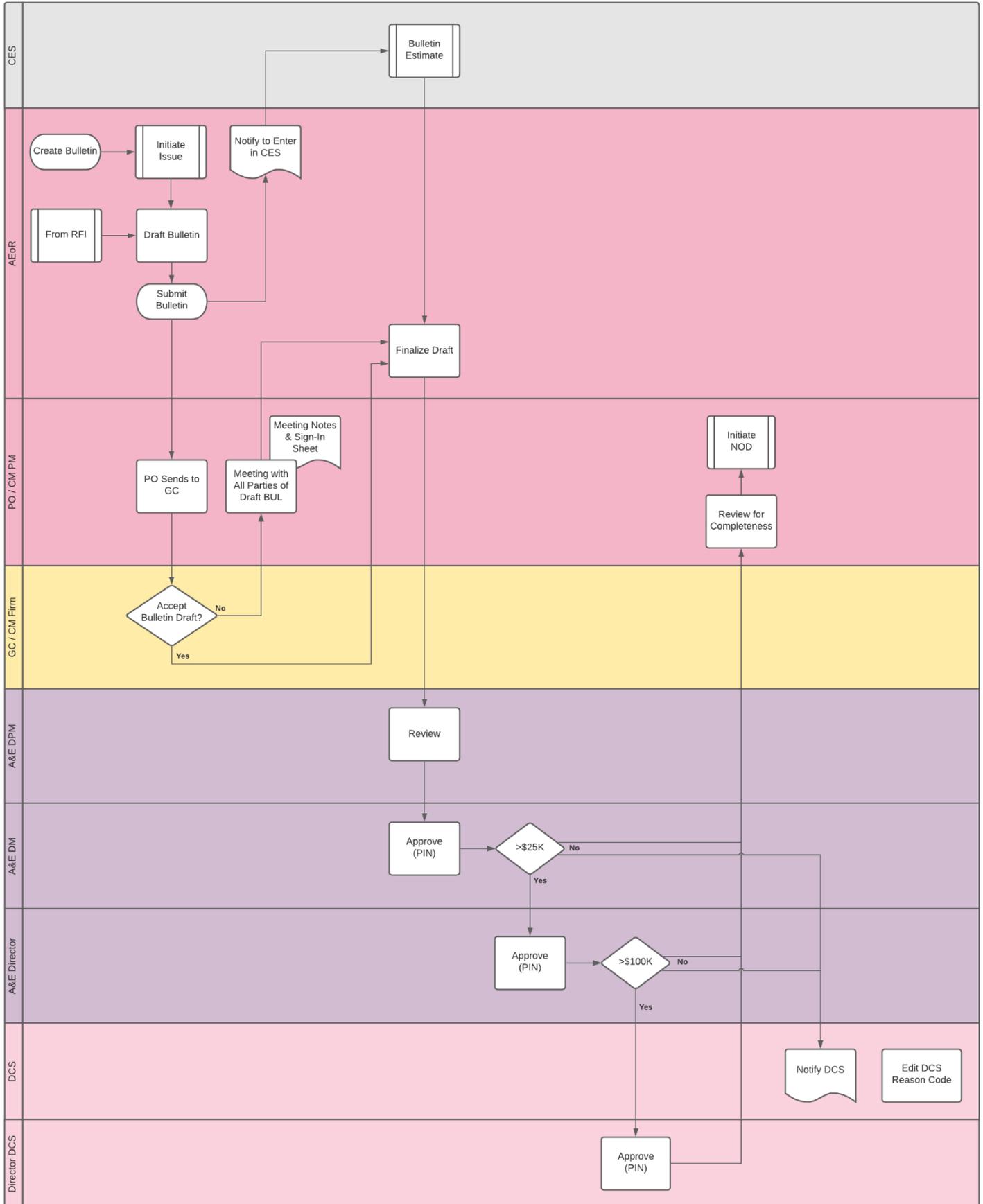
When the draft Bulletin is complete, the AEOB sends the Bulletin to the CM PM, and the CM PM sends the Bulletin to the CM FIRM for review and acceptance. If the Bulletin is not accepted, the CM PM holds a meeting with all parties to discuss the Draft Bulletin. Once accepted, the draft is sent to the AEOB to be finalized with the completed estimate. Next, the Bulletin is reviewed by the A&E DPM and sent through an approval process based on dollar value.

- The A&E DM PIN signs all Bulletins. If less than or equal to \$25,000, the Bulletin is approved.
- The A&E Director PIN signs Bulletins greater than \$25,000. If less than or equal to \$100,000, the Bulletin is approved.
- The Director DCS PIN approves Bulletins greater than \$100,000.

CM PM approval:

- The CM PM processes the Bulletin to initiate a NOD (*See Notice of Direction*)
- DCS is notified and can update the DCS Reason Code as needed.

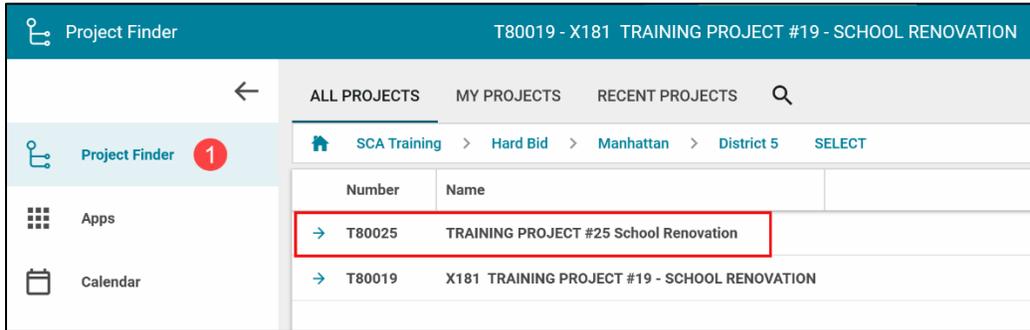
Workflow Diagram



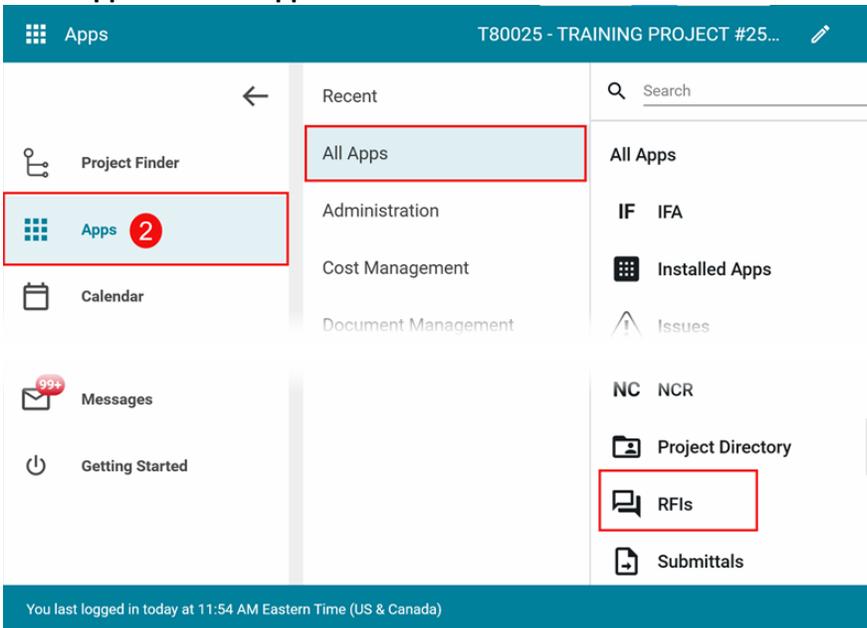
Step-by-Step Instructions

AEoR Creates a Bulletin from an RFI

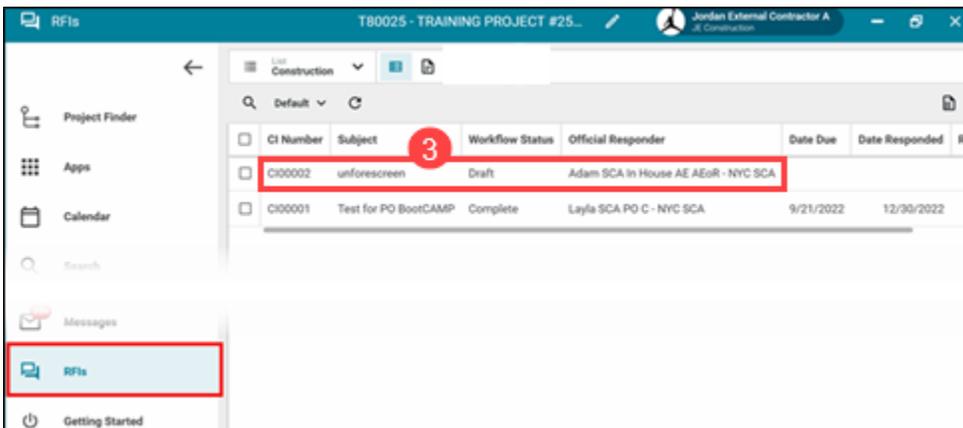
1. Go to the **Project Finder** and click on the desired project.



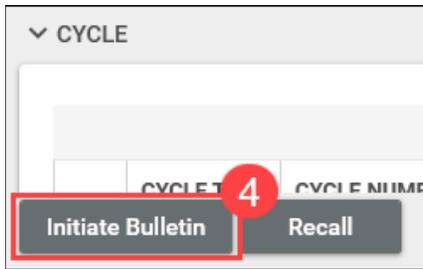
2. Go to **Apps**> Click **All Apps**> Click **RFI**.



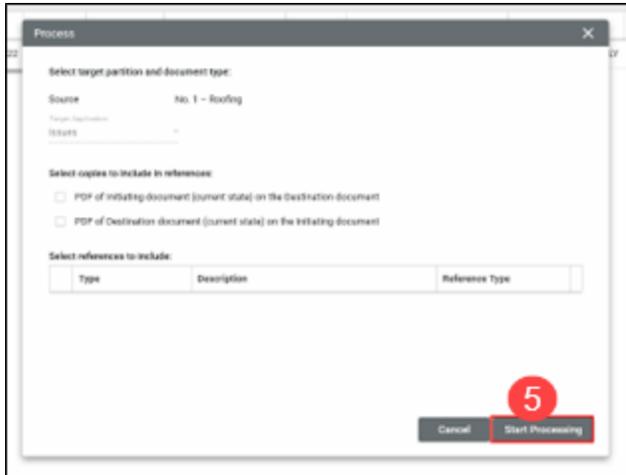
3. Select the desired RFI.



4. Click **Initiate Bulletin**.



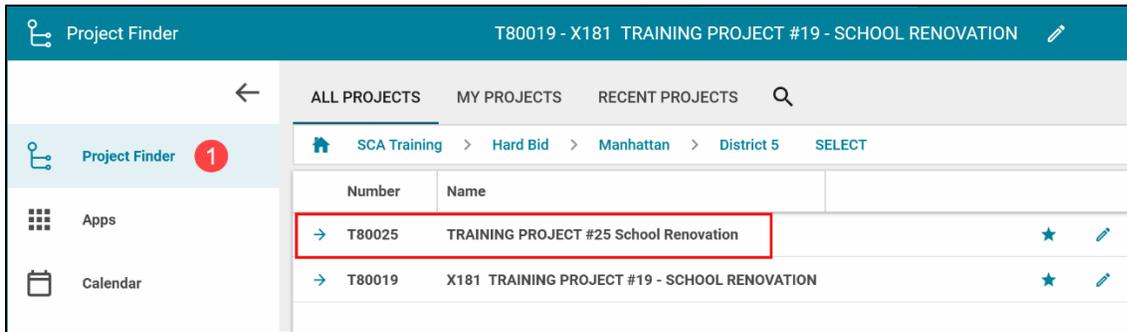
5. Click **Start Processing**.



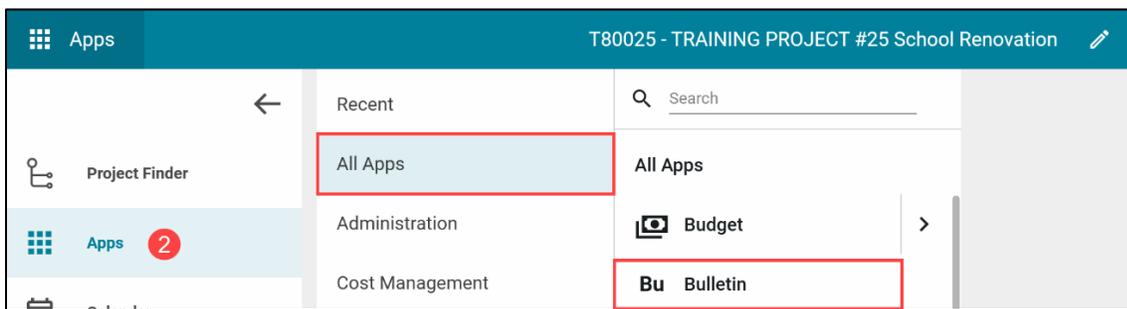
The Bulletin app will open. Follow the steps listed below, starting with [Step 4](#).

AEoR Creates a New Bulletin

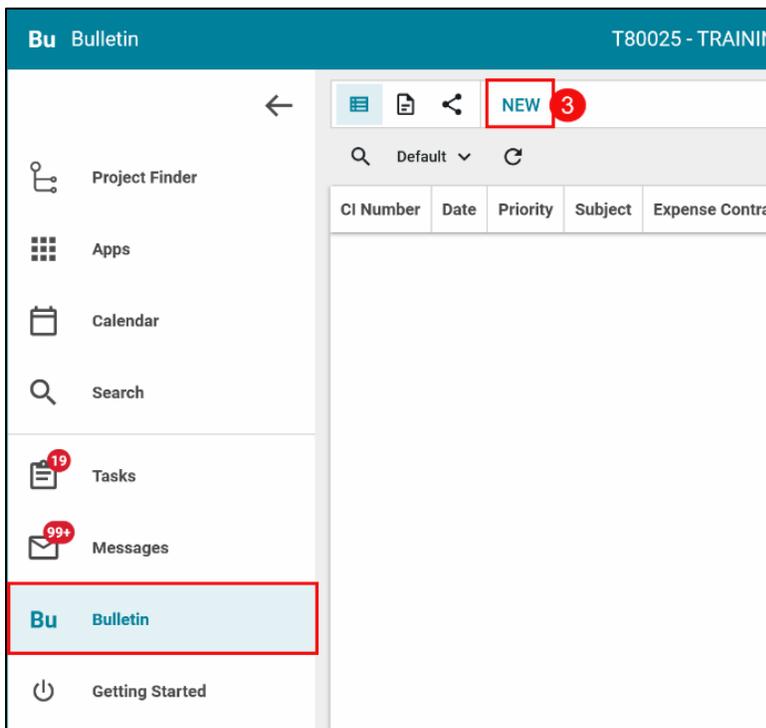
1. Go to the **Project Finder** and click on the desired project.



2. Go to **Apps**> Click **All Apps**> Click **Bulletin**



3. Click **New**.



Bulletin Details

4. Enter the following information:

- **LLW:** If your project has more than one LLW, select the correct one from the dropdown menu.
- **Priority (Optional):** Select from the dropdown menu.
- **Subject (Required):** Type your Bulletin subject.
- **Description (Optional):** Type your Bulletin subject.
- **Location (Optional):** Select from the dropdown menu.

The screenshot shows a form titled "Bulletin" with a red circle containing the number "4" in the top left corner. The form is divided into two sections. The top section contains the following fields: LLW (M835 - 25008 - TRAINING ONLY), Building ID (M835), Design Number / Package Number, LLW (25008 - TRAINING ONLY), Architect (Adam SCA In House AE AEoR - NYC SCA), and Contractor (Mia External Contractor Y - YY Construction). The bottom section is titled "DETAILS" and contains the following fields: CI Number, Date (12/30/2022), Priority (Normal), Subject (with a red error message "Field is required."), Bulletin Description, and Location.

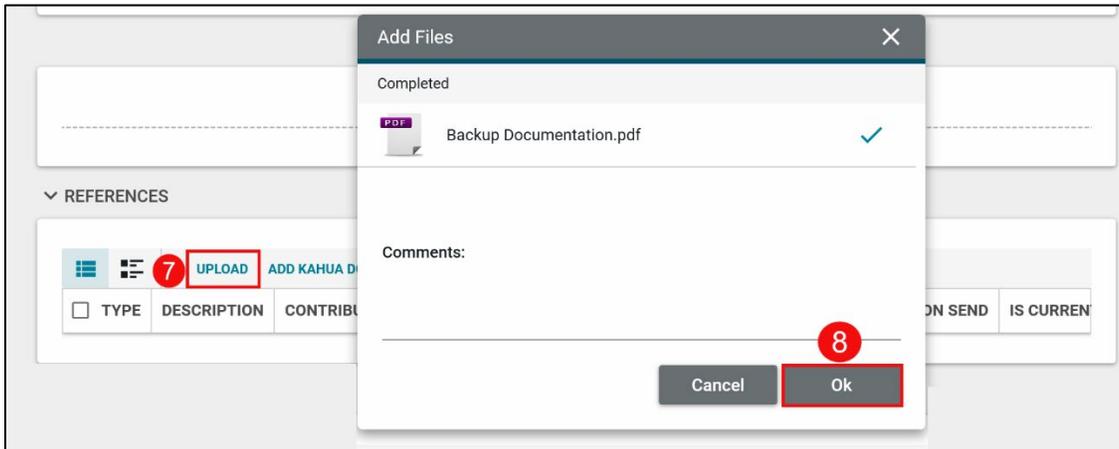
5. **Contract Documents** section (Optional). As a best practice, you should provide details for all parties to view.

6. **Cost** section (Required):

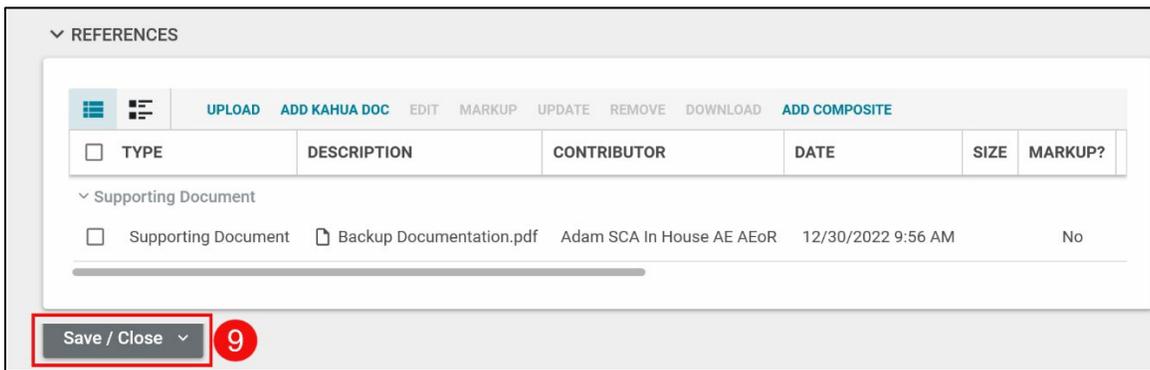
- Cost Effect
- Reason Code
- AEoR Reason Justification

The screenshot shows two sections of the form. The top section is titled "CONTRACT DOCUMENTS" with a red circle containing the number "5" in the top left corner. It contains three text input fields: Drawing Number, Detail Number, and Spec Section. The bottom section is titled "COST" with a red circle containing the number "6" in the top left corner. It contains four text input fields: Cost Effect (with a red error message "Field is required."), Estimated Cost, Reason Code, and AEoR Reason Justification (with a red error message "Field is required.>").

7. **References** section: Click **Upload** to attach all necessary backup documentation.
8. Click **OK**.

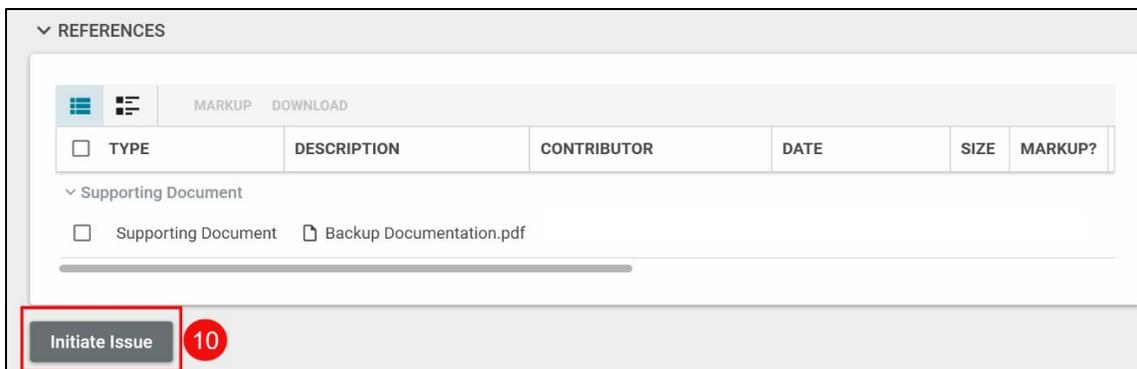


9. Click **Save/Close**.

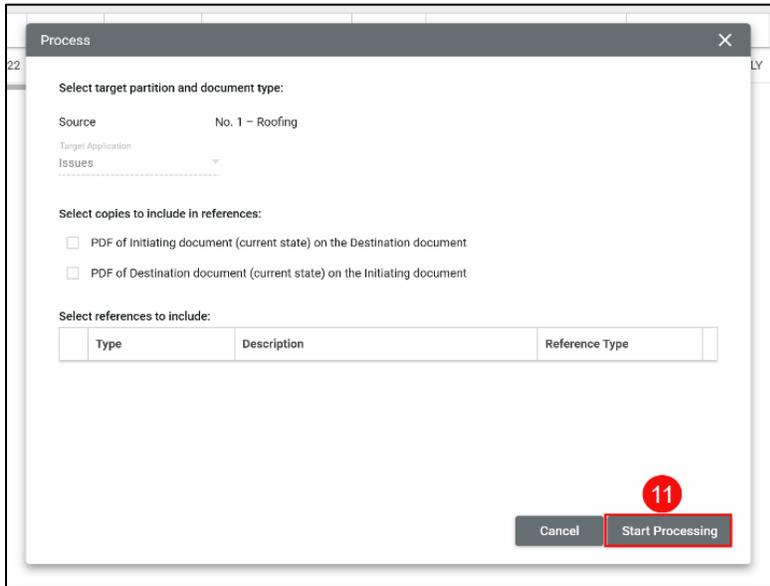


10. Click **Initiate Issue**.

NOTE: The bulletin may have been initiated from an RFI with a Closure Status of **Bulletin Required**. In this case, an Issue is already created.



11. Click **Start Processing**



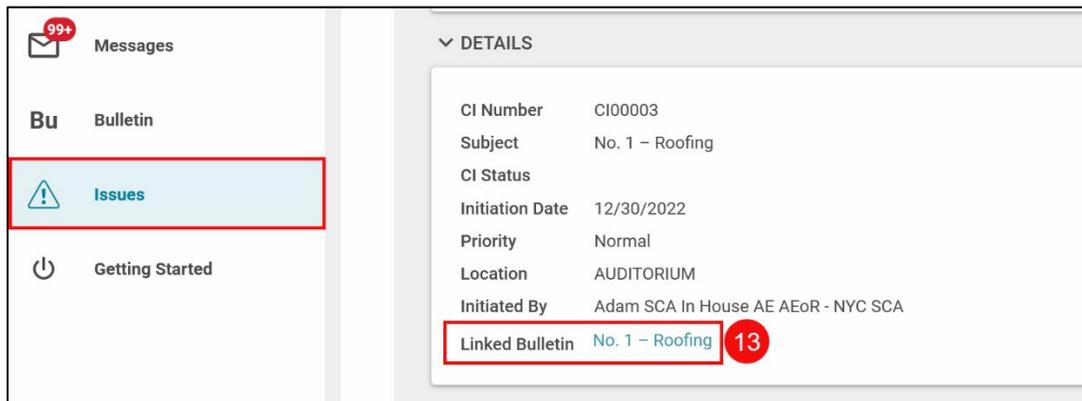
Issues App

After you start processing the Bulletin, the Issues app opens to create a change issue (CI), which provides a global CI number for all activity related to this Bulletin. For instance, if the Bulletin results in an NOD or Change Order, those records will all be linked to the issue.

12. Click **Save/Close**



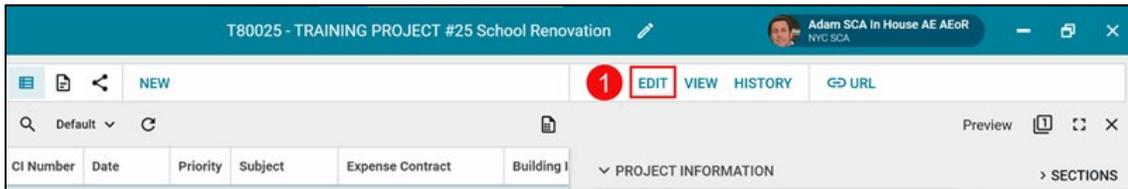
13. Click **Linked Bulletin** to return to Bulletin.



Edit Bulletin (Optional)

You can modify the Bulletin **before** it has been submitted OR if it has been recalled or returned to you.

1. Click **Edit**.

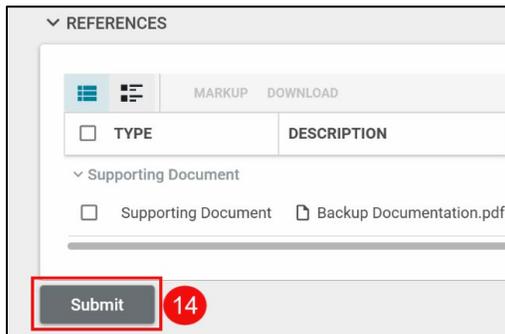


2. Make any other changes as needed and click **Save/Close**.

Submit Bulletin

Navigate to the desired Bulletin if you are not already in the bulletin.

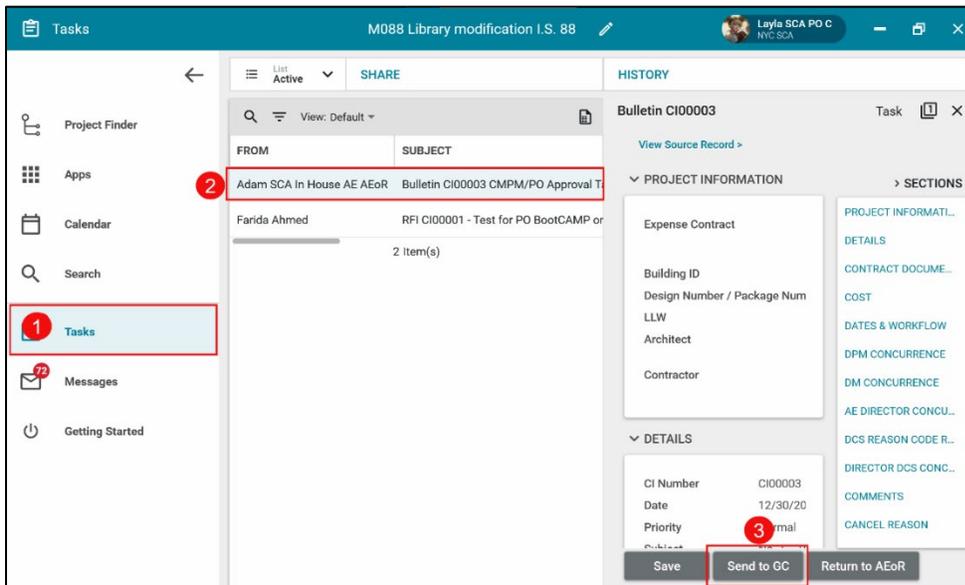
14. Click **Submit**.



IMCM PMRTANT: DO NOT DELETE. If you need to change any information *after* submission, please reach out to Helpdesk@nycsca.org

CM PM Sends Bulletin to CM Firm

1. Open **Tasks**.
2. Select the desired task and review each section.
3. Review the details and click **Send to CM FIRM**.

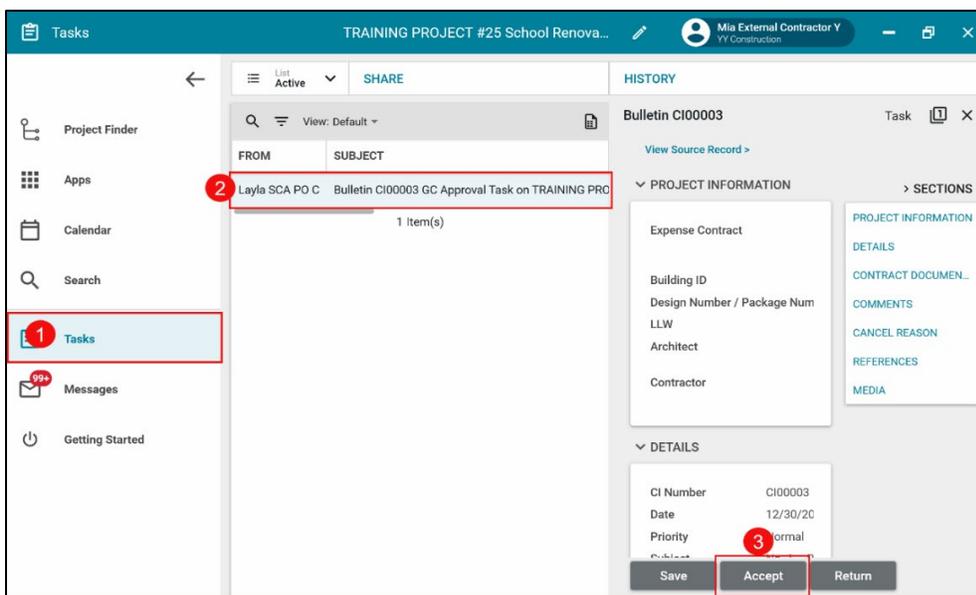


CM Firm Accepts or Returns the Bulletin

The CM Firm reviews the draft bulletin and the AEoR finalizes the bulletin OR the CM Firm returns the draft Bulletin and the CM PM must coordinate a meeting to rectify any issues. Those steps take place outside of the CAMP platform.

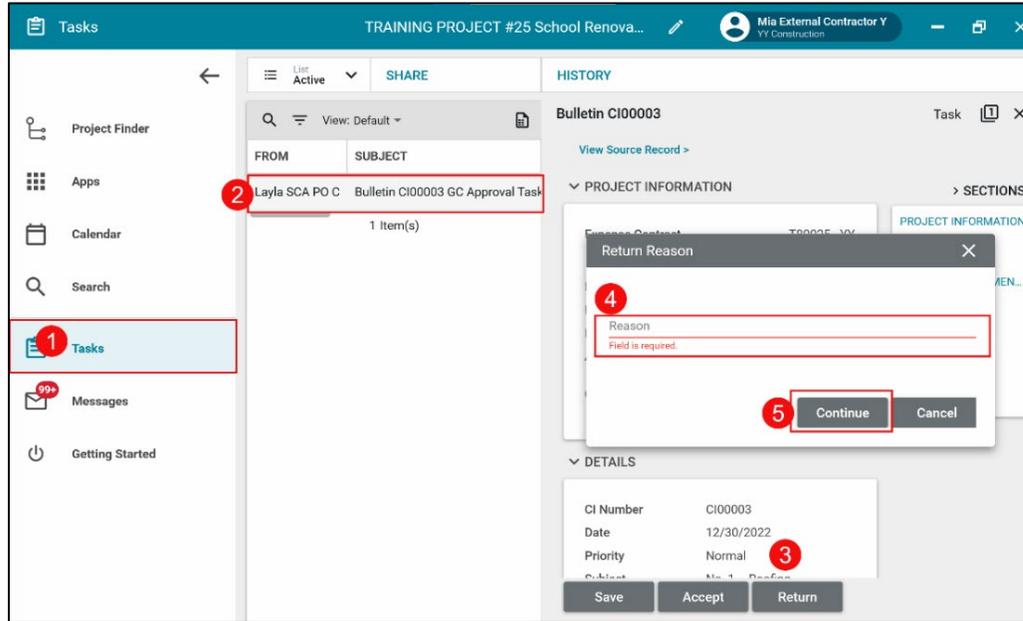
CM Firm Accepts the Bulletin

1. Open **Tasks**
2. Select the desired task.
3. Review details of record and click **Accept**.



Exception: CM Firm Returns the Bulletin to the CM PM

1. To **Return**, Click **Tasks**.
2. **Select** the desired task.
3. Click **Return**.
4. Enter **Return Reason**.
5. Click **Continue**.



CM PM Holds Meeting and Forwards Bulletin to AEO

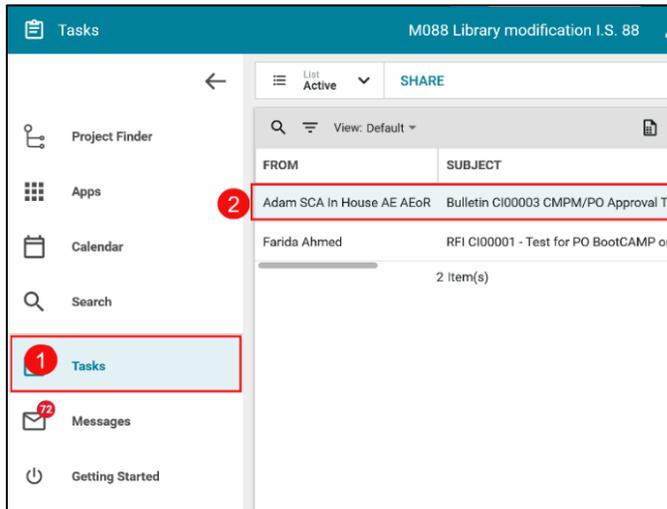
1. Open **Tasks** > Select the desired task.
2. Navigate to the **References** section > Click **Upload** and attach the **Sign-In Sheet** and **Meeting Notes**.
3. Click **Meeting Completed**.



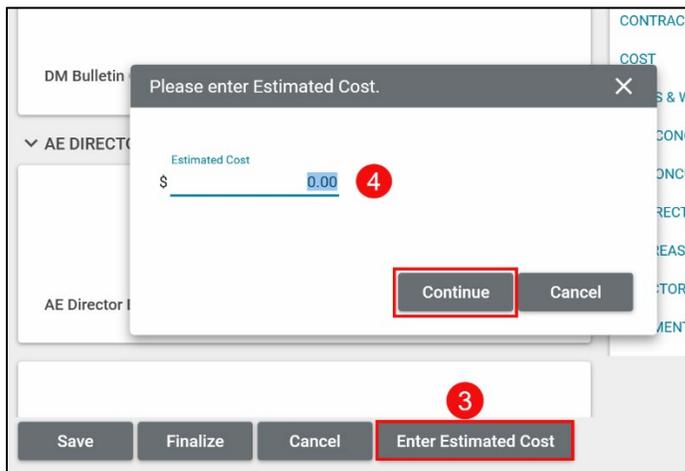
AEoR Finalizes the Bulletin Draft

Required: You **must** enter the Estimated Cost. Make any other changes to the Bulletin before Finalizing the Bulletin.

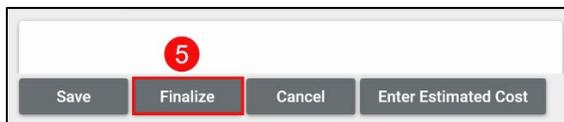
1. Open **Tasks**> Select the desired task.
2. Click **Edit**.



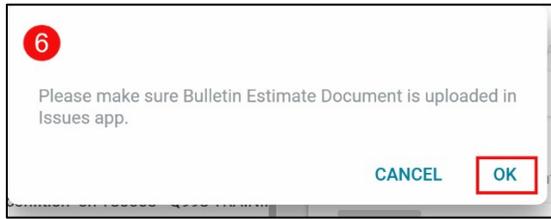
3. Click **Enter Estimated Cost**.
4. Enter the **cost effect amount**, if applicable and click **Continue**.



5. Click **Finalize**.

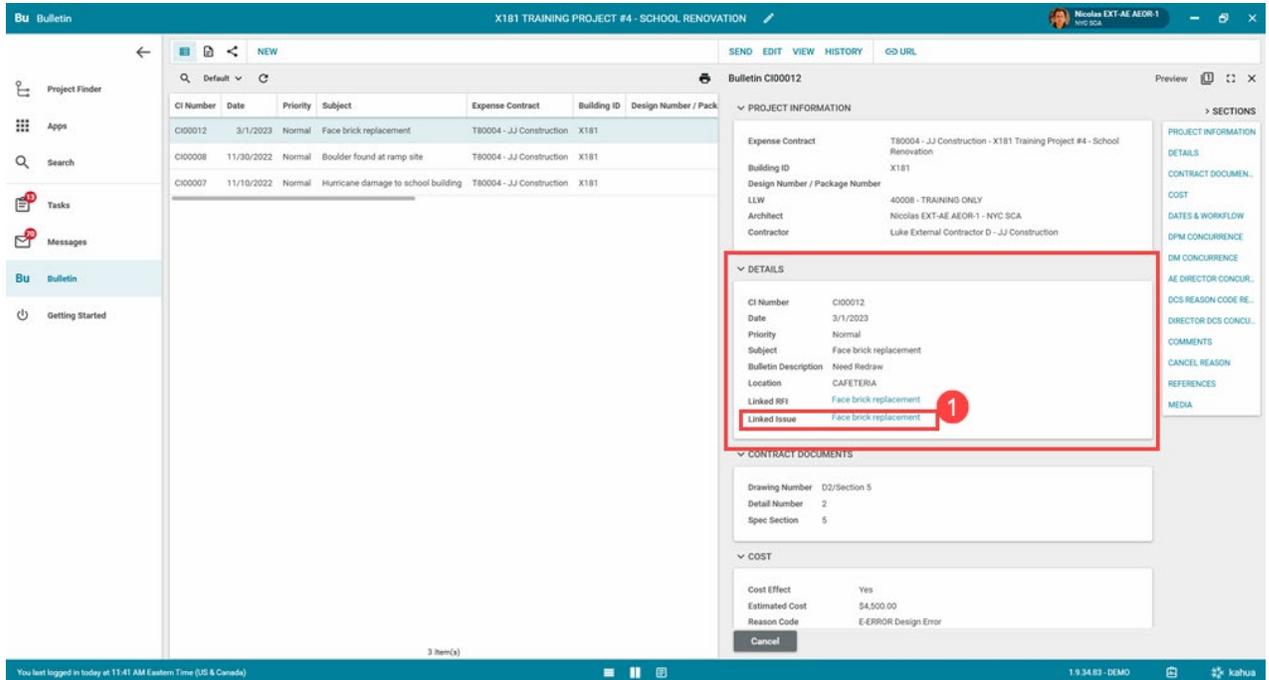


- A CM PM popup window will remind you to attach the Bulletin Estimate Document in the References section of the linked Issue, which you can do at any time. Click **OK**.

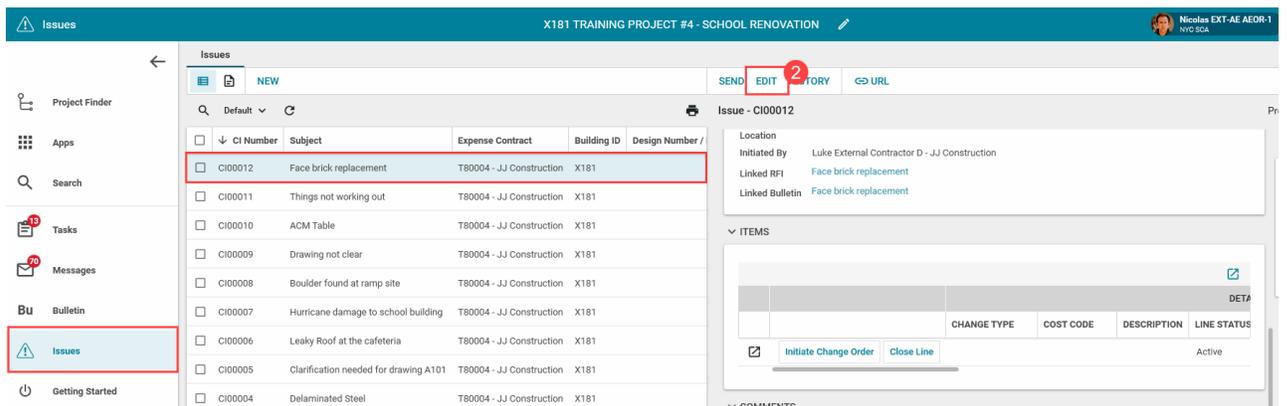


Upload the Bulletin Estimate Document

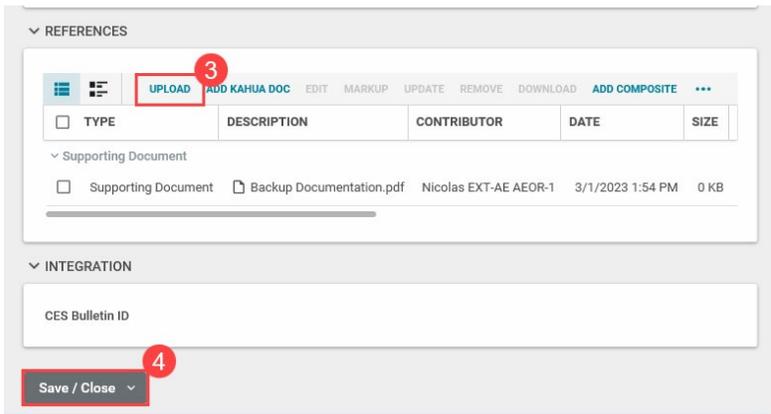
- With the Bulletin open, go to the Details section and click the Linked Issue.



- The Change Issue associated with the original RFI and new Bulletin will open in the **Issues App**. Click **Edit**.



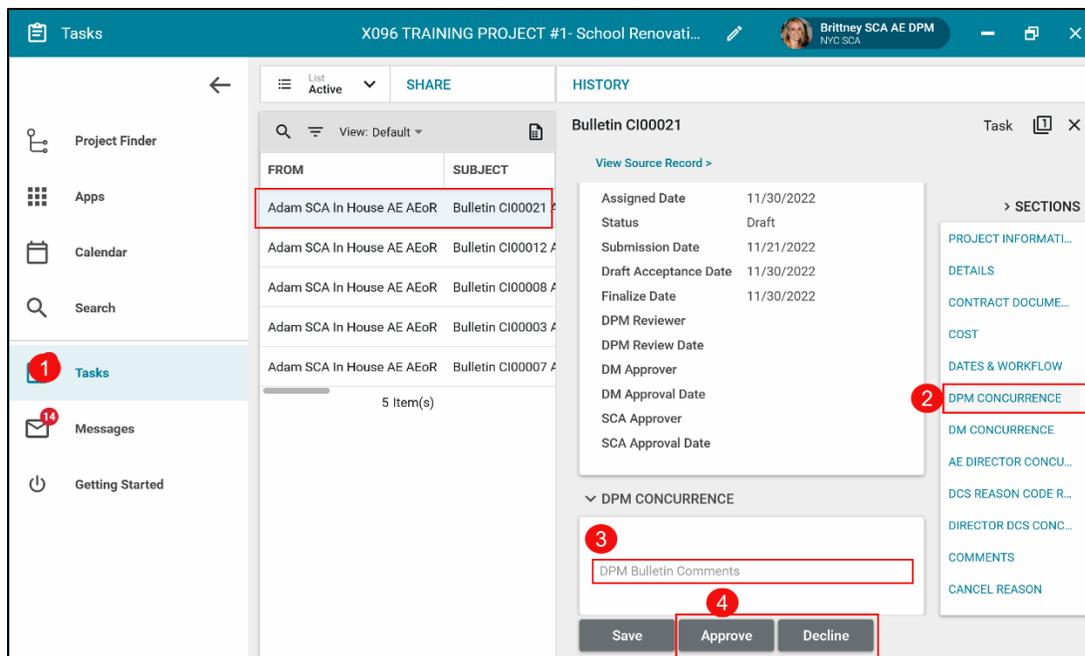
- In the **References** section, click **Upload** to attach your Cost Estimate.
- Click **Save/Close**.



DPM Reviews and Approves the Bulletin

1. Open **Tasks** > Select the desired task.
2. Navigate to the **DPM Concurrence** section
3. Enter your **comments**.
4. Click **Approve** or **Decline**.

Note: If you **Decline**, you must first enter your comments under the **Concurrence** section for your role.



DM > AE Director > DCS Director Approve Bulletin

Once the AE submits the Bulletin for approval it moves through the [approval process](#) sequentially based on dollar value:

- SCA DM reviews all Bulletins and approves when less than or equal to \$25K
- AE Director PIN signs the Bulletin when greater than \$25K up to \$100K.
- DCS Director approves Bulletins greater than \$100K

Once the Bulletin is approved by all parties, the CM PM can initiate the NOD. See the [CAMP Mentor NOD User Guide](#) for further instructions.