



## RFIs Training Guide (JOC & Emergency)

Date Created: 7/8/2021

Date Updated: 8/12/2022

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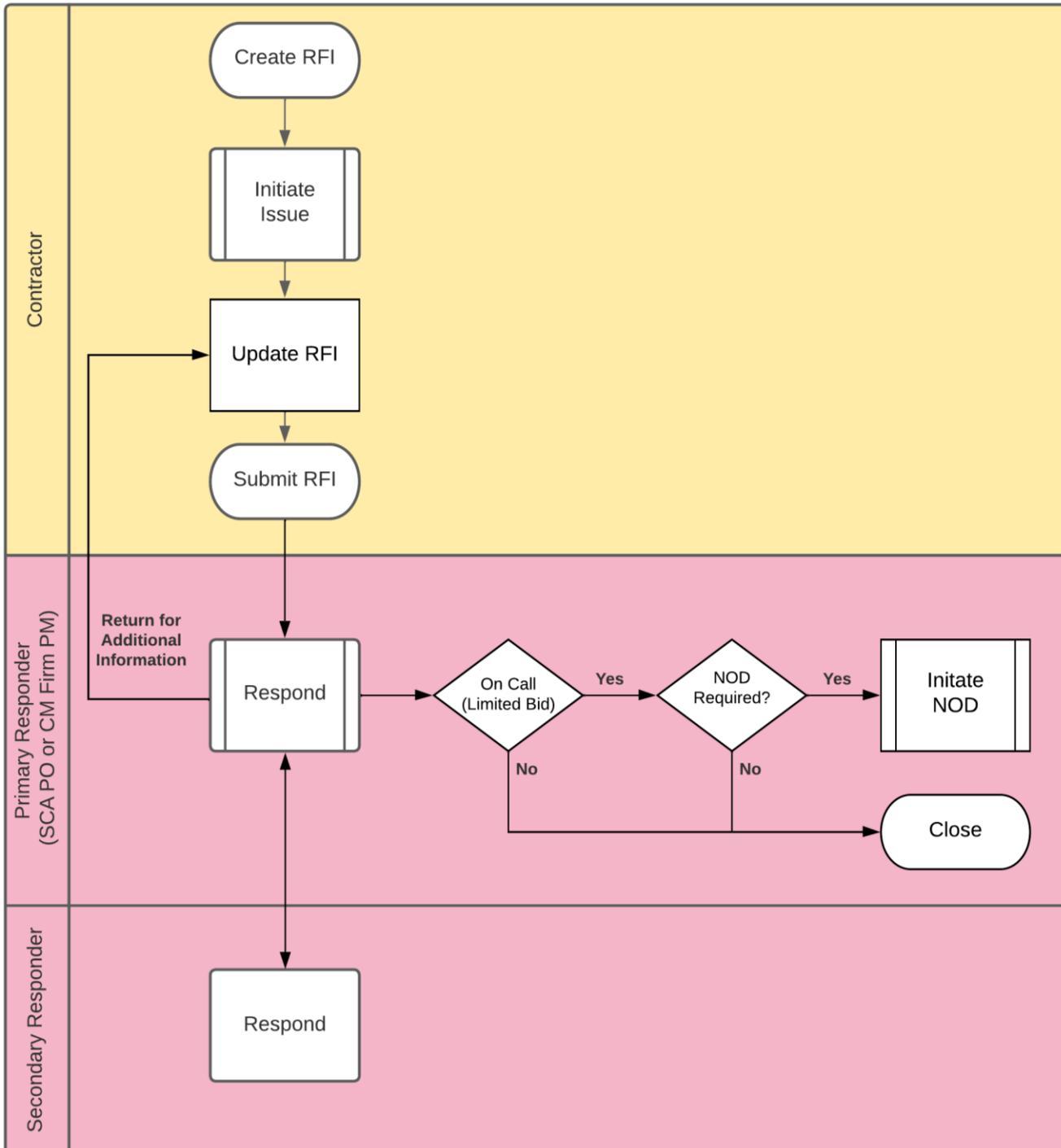
## About

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. In the case of an Emergency On Call (Limited Bid) project, the RFI can result in a Notice of Direction (NOD).

## Notes

While the RFI process is consistent for all project types, the terms CM Project Manager and CM Program Manager are specific to Requirements projects.

## Workflow Diagram



## Process Overview

The General Contractor creates the RFI and must initiate an Issue. After the Issue has been initiated, the GC can navigate back to the RFI and submit to the CM Project Manager.

The CM Project Manager can respond to the RFI, request additional information, or send to a secondary responder. In the case of an Emergency On Call (Limited Bid) project, the CM Project Manager is required to select a closure status before submitting their response.

After the CM Project Manager submits their response, the RFI is closed. If the closure status is 'NOD Required', the CM Project Manager can initiate an NOD (See 'Notice of Direction' Training Guide).

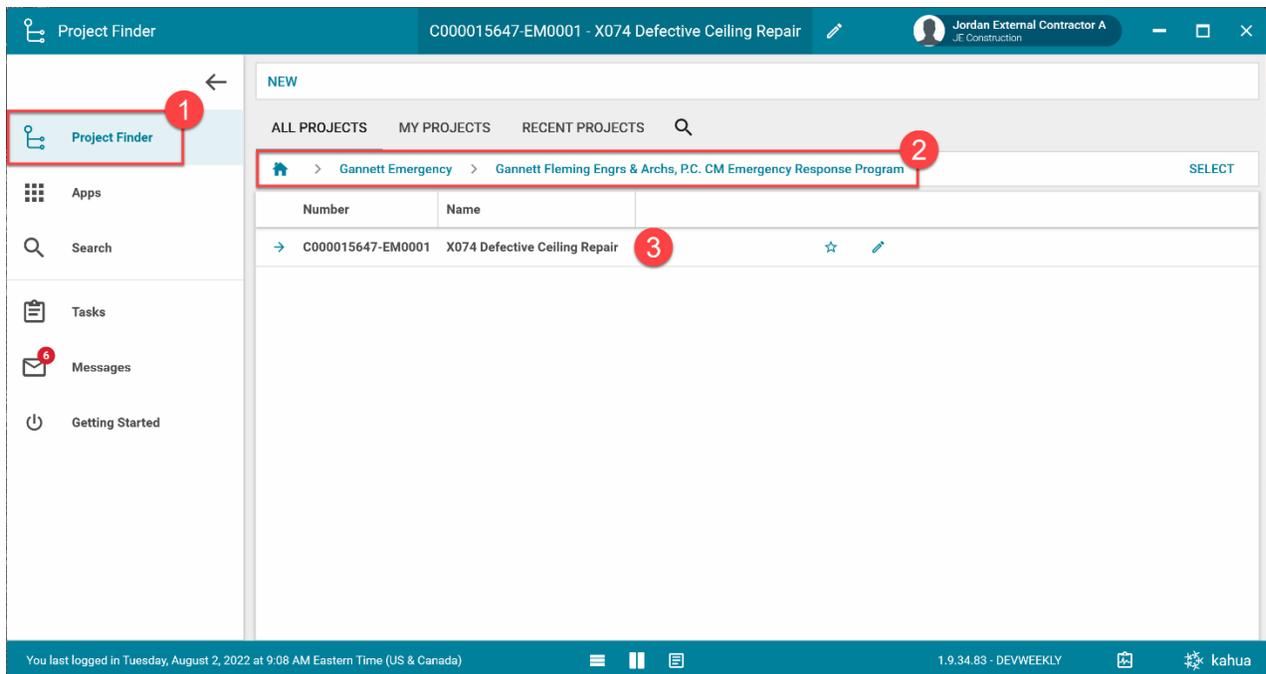
## Step-by-Step Instructions

### Create New RFI

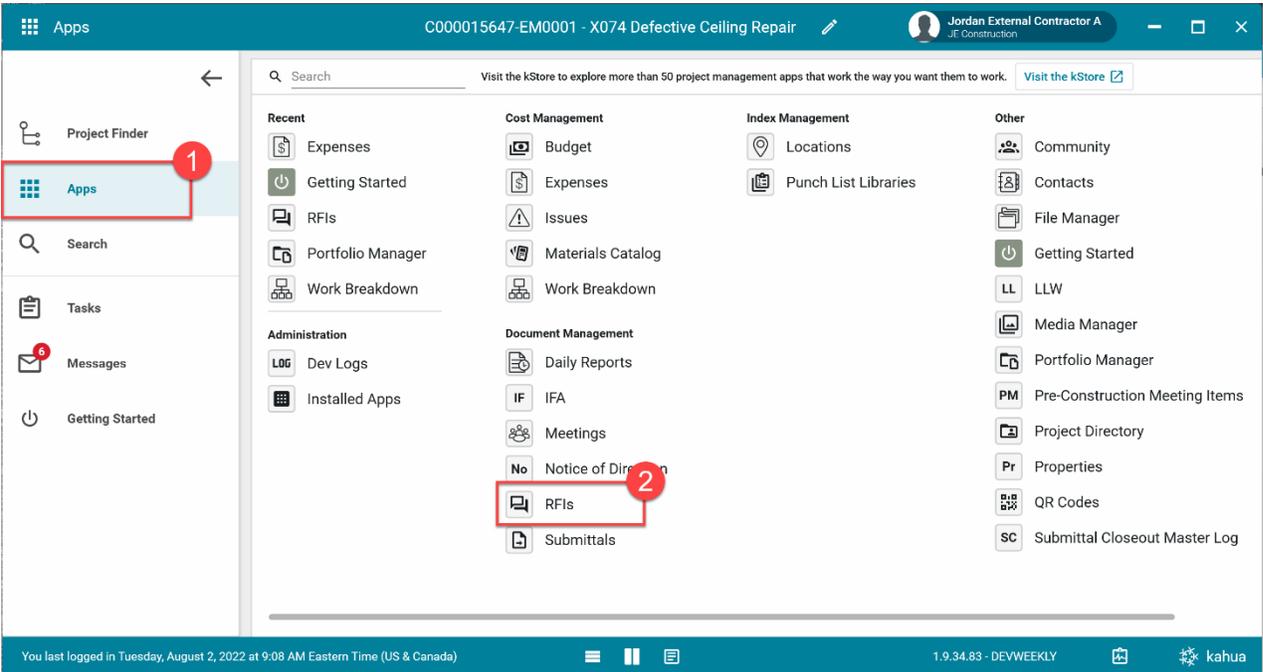
Role	Preceding Steps	Outcome
GC	→ RFI information is known.	→ The RFI is created.

### Steps

1. Go to 'Project Finder' > Navigate to desired subproject > Select the desired subproject

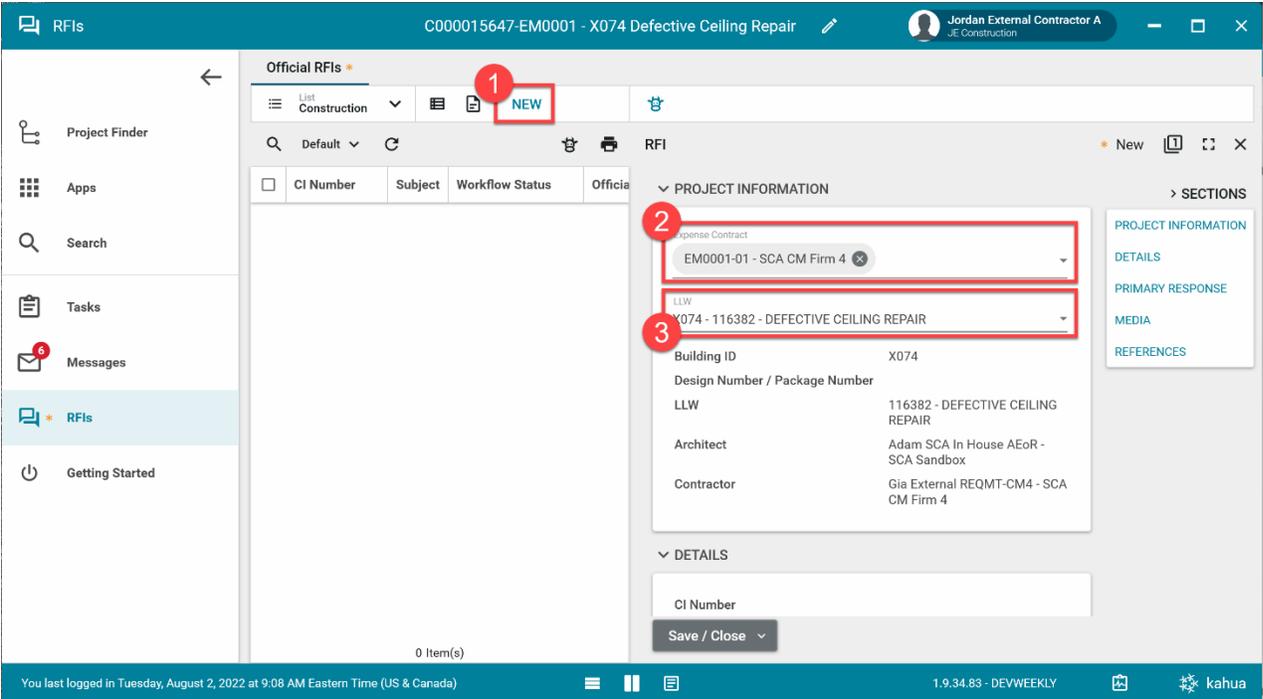


2. Go to 'Apps' > Select 'RFIs' application

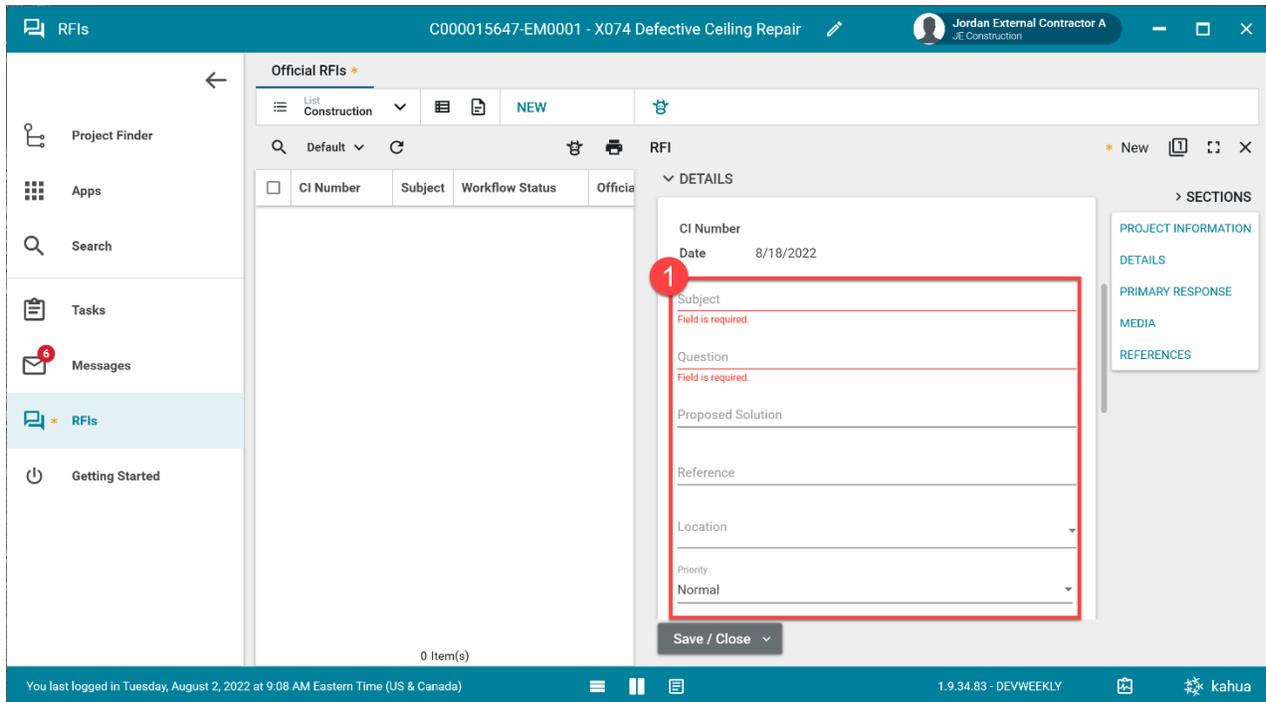


3. Click 'New' > Select 'Expense Contract' and 'LLW'

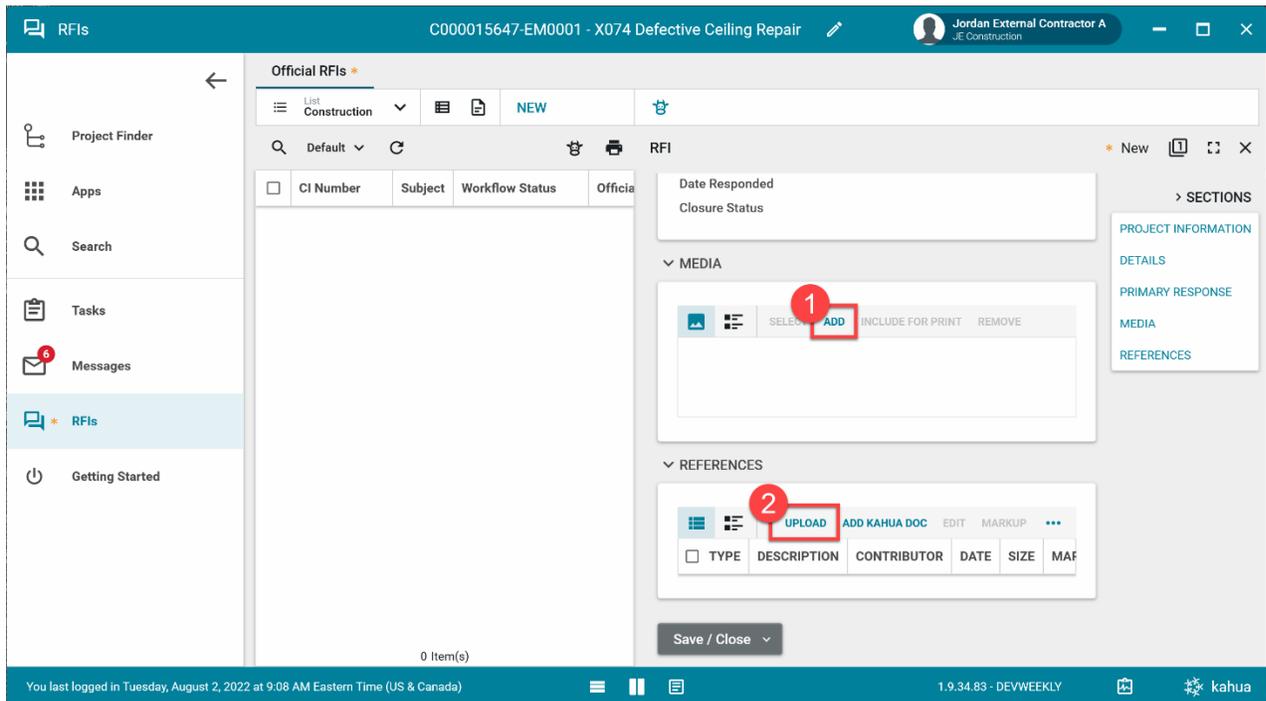
**Note:** If there is only one Expense Contract or LLW, the data will be automatically populated.



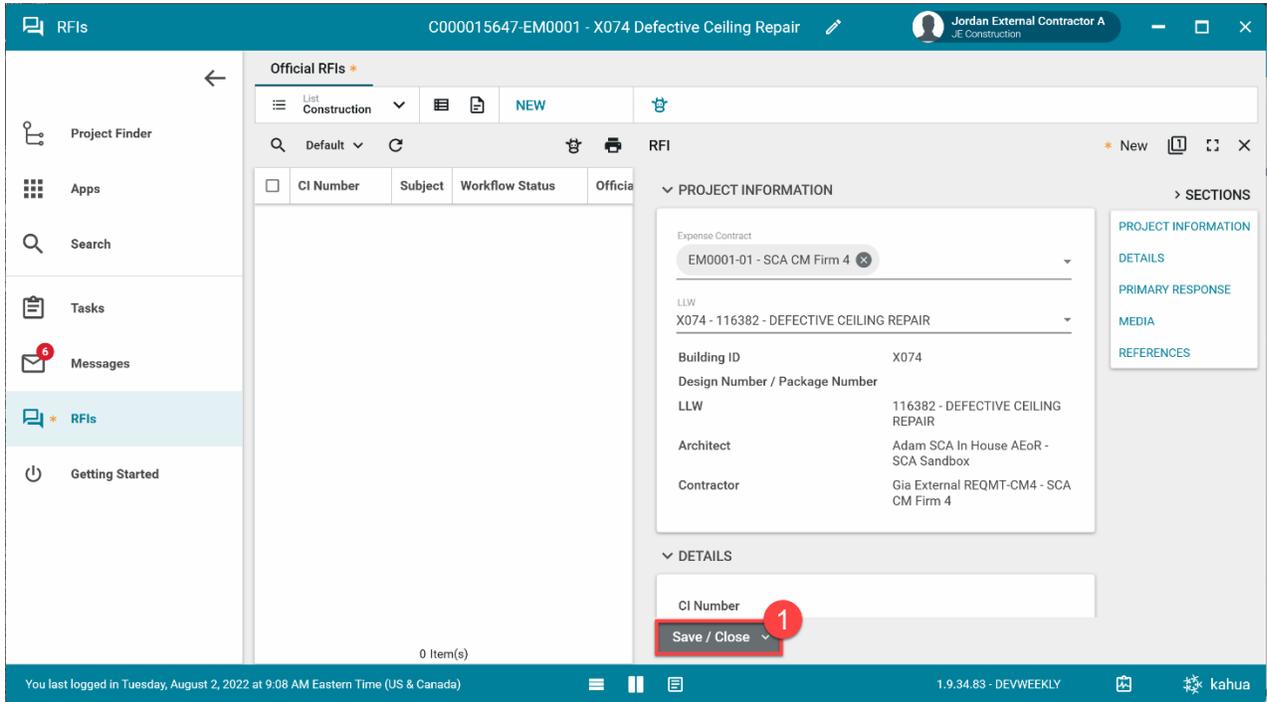
4. Enter details of RFI (Required Fields: 'Subject' and 'Question')



5. *Optional:* Select 'Add' to upload images to Media section > Select 'Upload' to upload attachments



6. Select 'Save / Close'

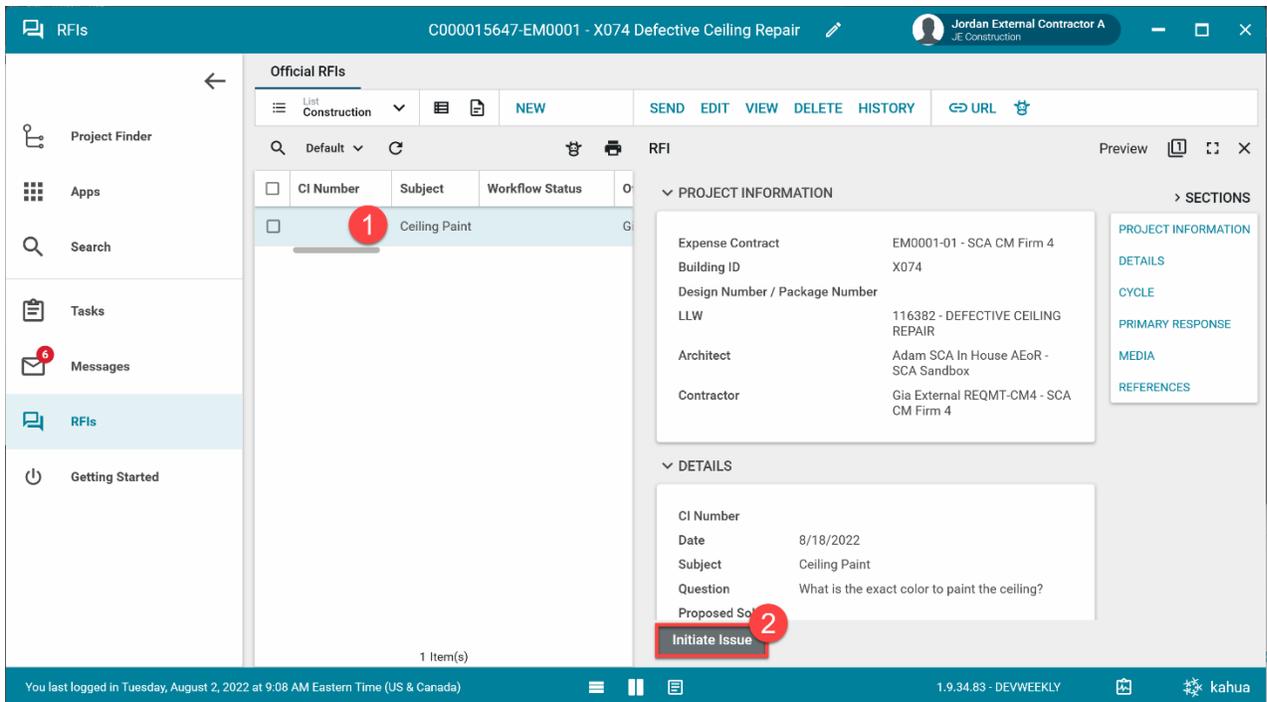


**Create Linked Issue**

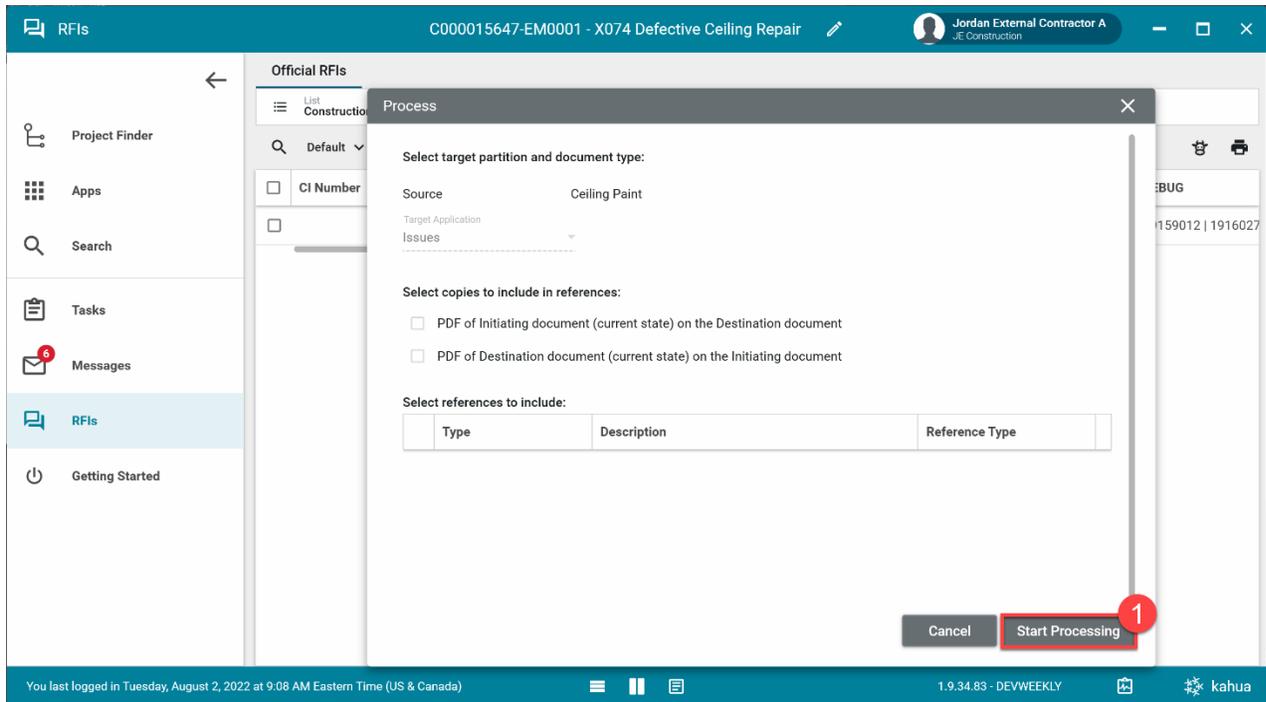


**Steps**

1. Select the desired RFI > Select 'Initiate Issue'

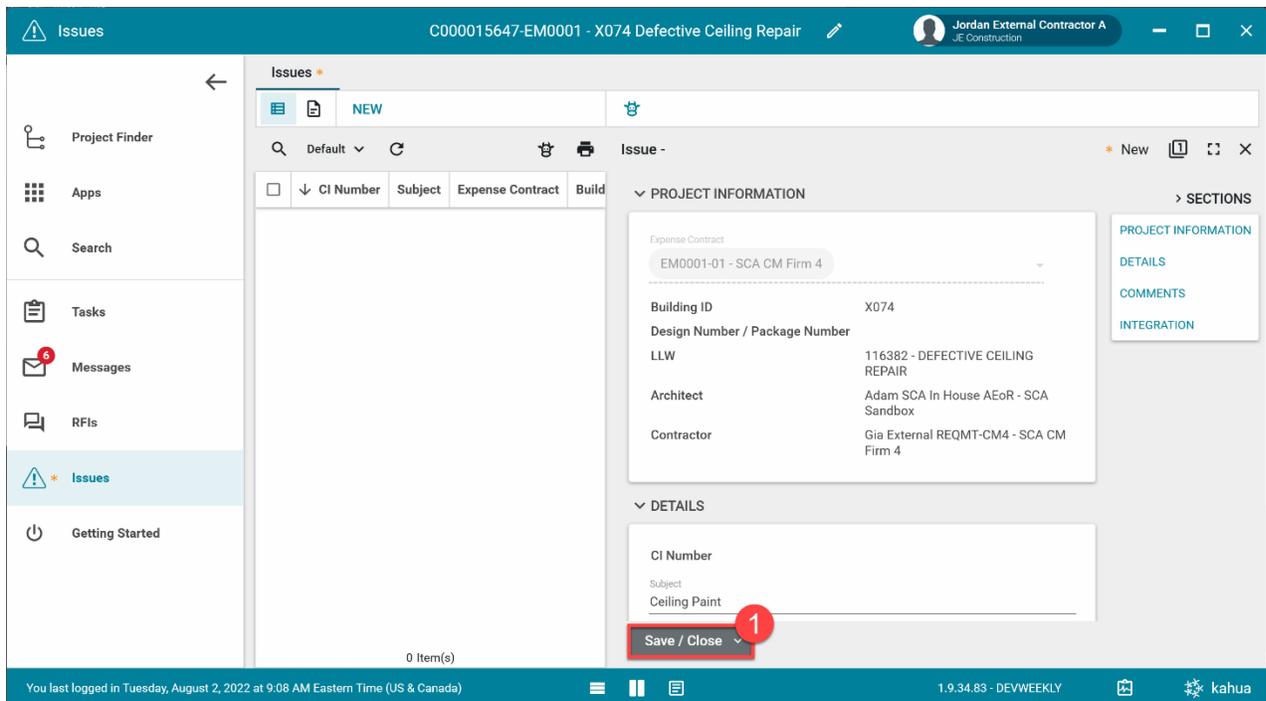


2. Click 'Start Processing'

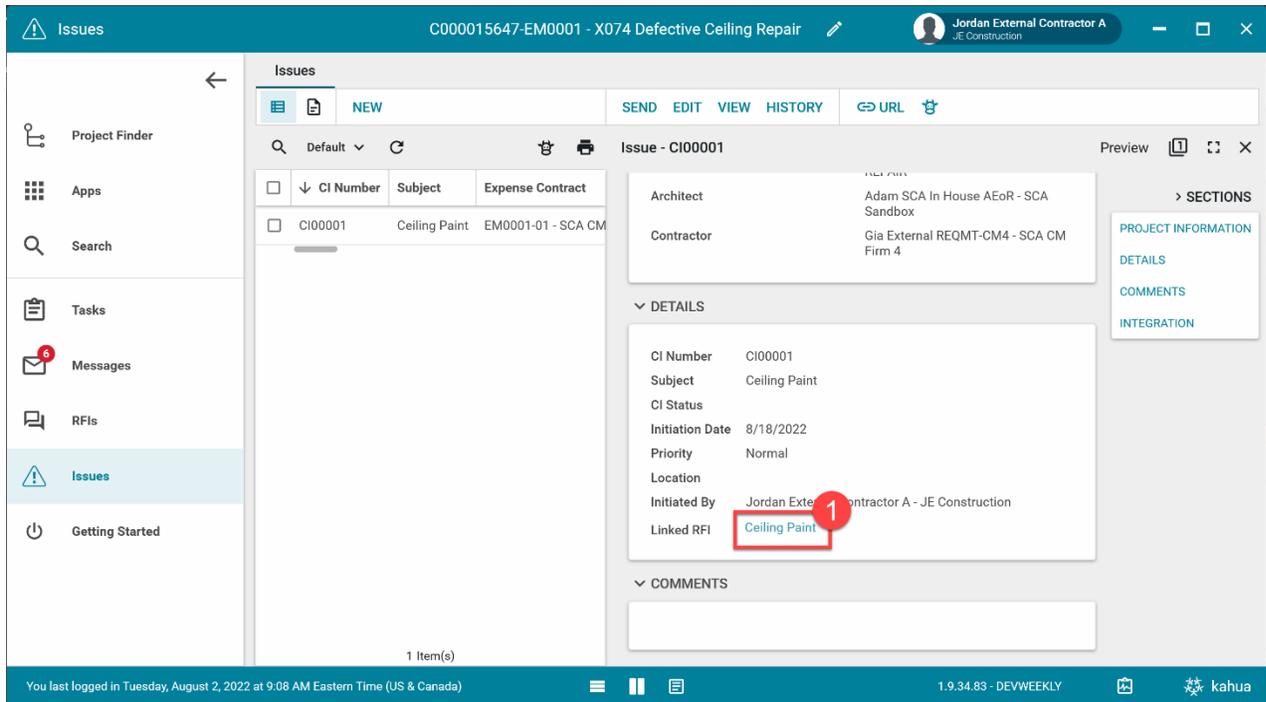


3. Select 'Save / Close'

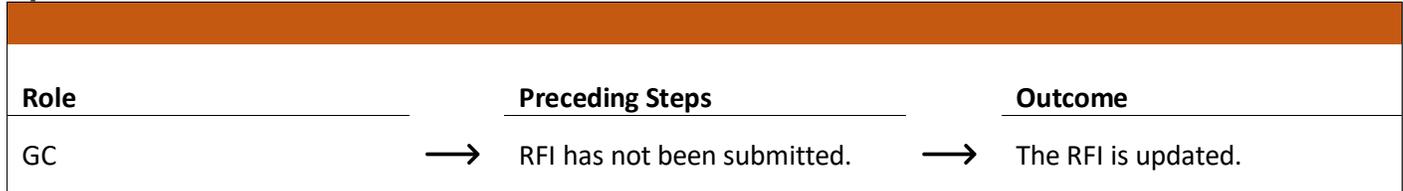
**Note:** You are now in the Issues application. To continue with the RFI you will need to navigate back to the RFI application (see next step).



4. Select the link in 'Linked RFI' to return to the RFI app

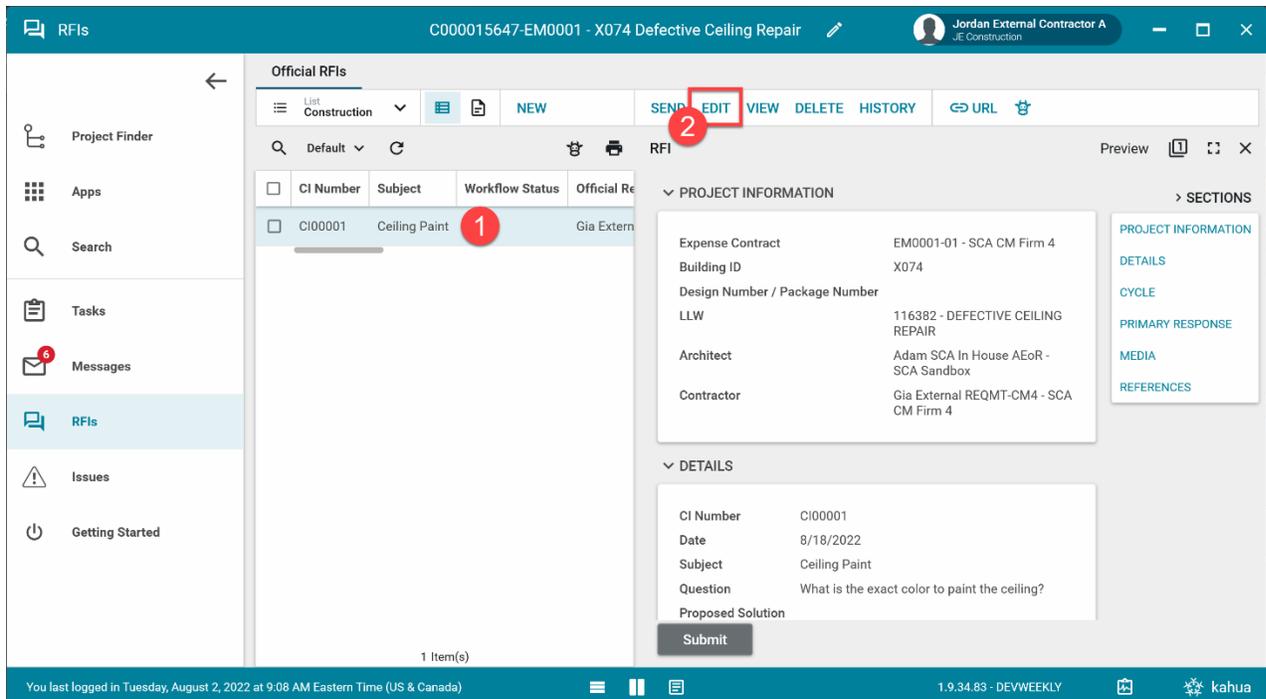


**Update RFI**

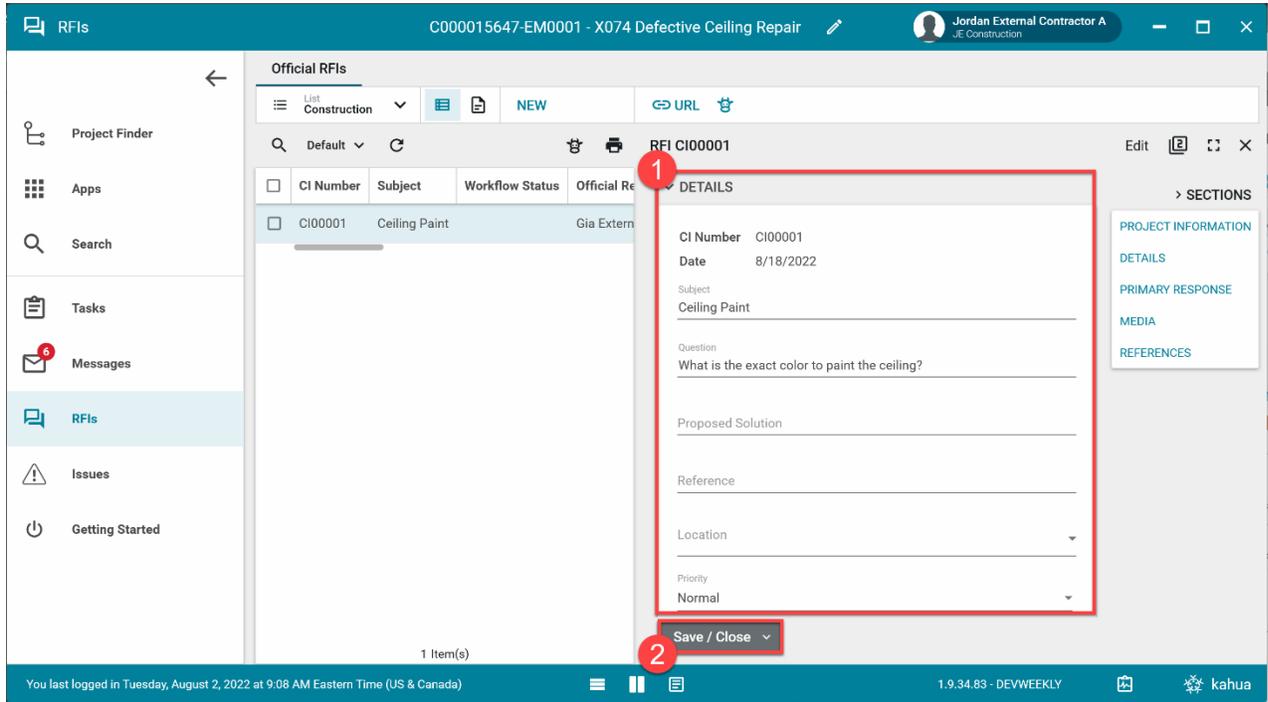


**Steps**

1. In the RFI application, select RFI requiring update > Click 'Edit'



2. Update any fields > Click 'Save/Close'

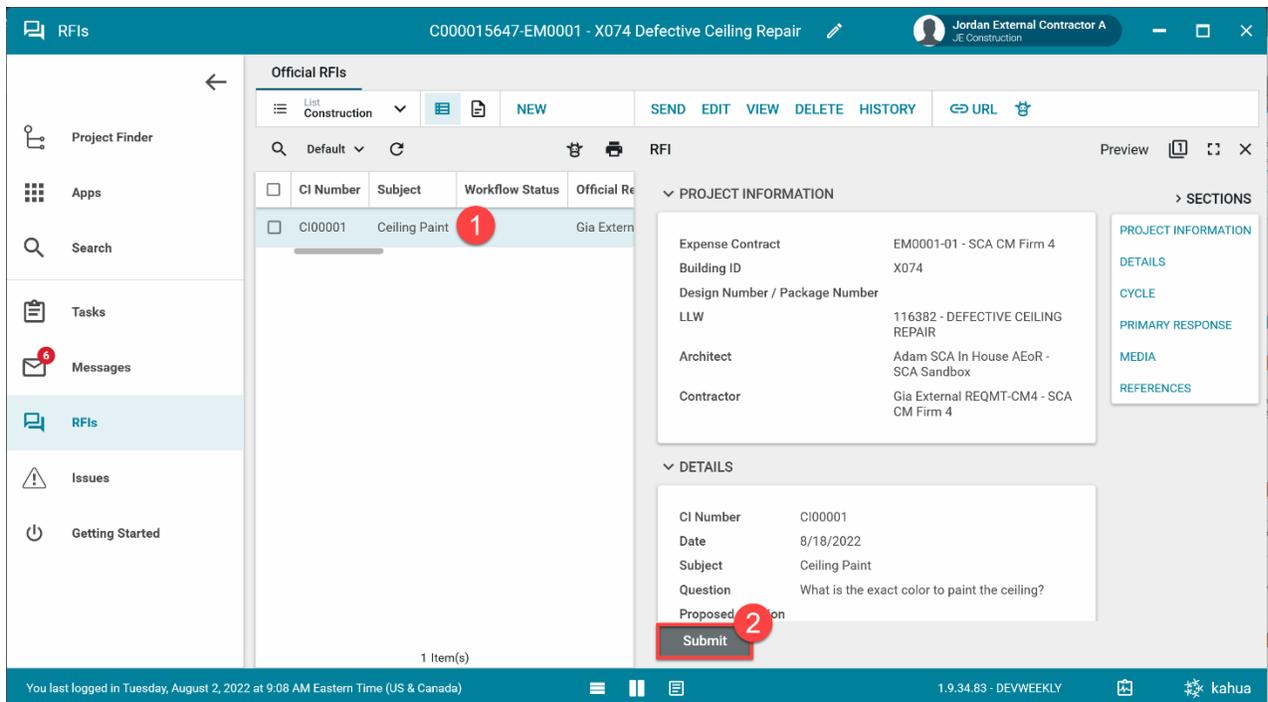


**Submit RFI**

Role	Preceding Steps	Outcome
GC	→ RFI has a linked Issue.	→ RFI is sent to the CM Project Manager for their response.

**Steps**

1. In the RFI application, select RFI requiring submission > Click 'Submit'

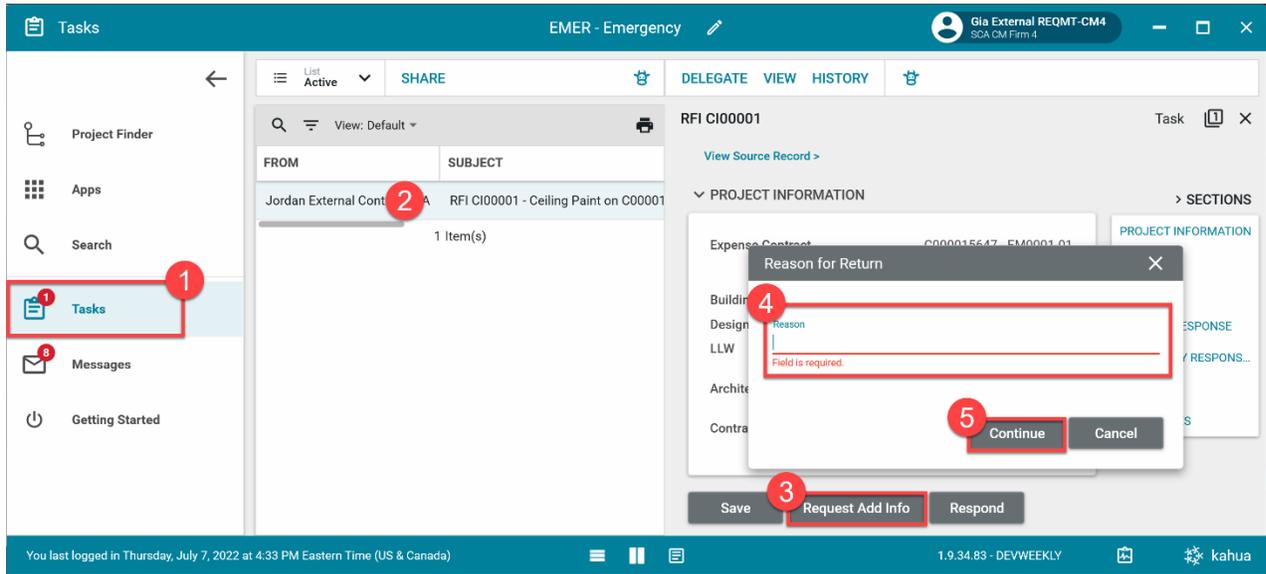


## Primary Responder – Request Additional Information

Role	Preceding Steps	Outcome
Primary Responder	RFI is submitted to Primary Responder.	Contractor receives task to provide additional information.

### Steps

- Go to 'Tasks' > Click on RFI task > Click 'Request Add Info' > Enter 'Reason for Return' > Click 'Continue'

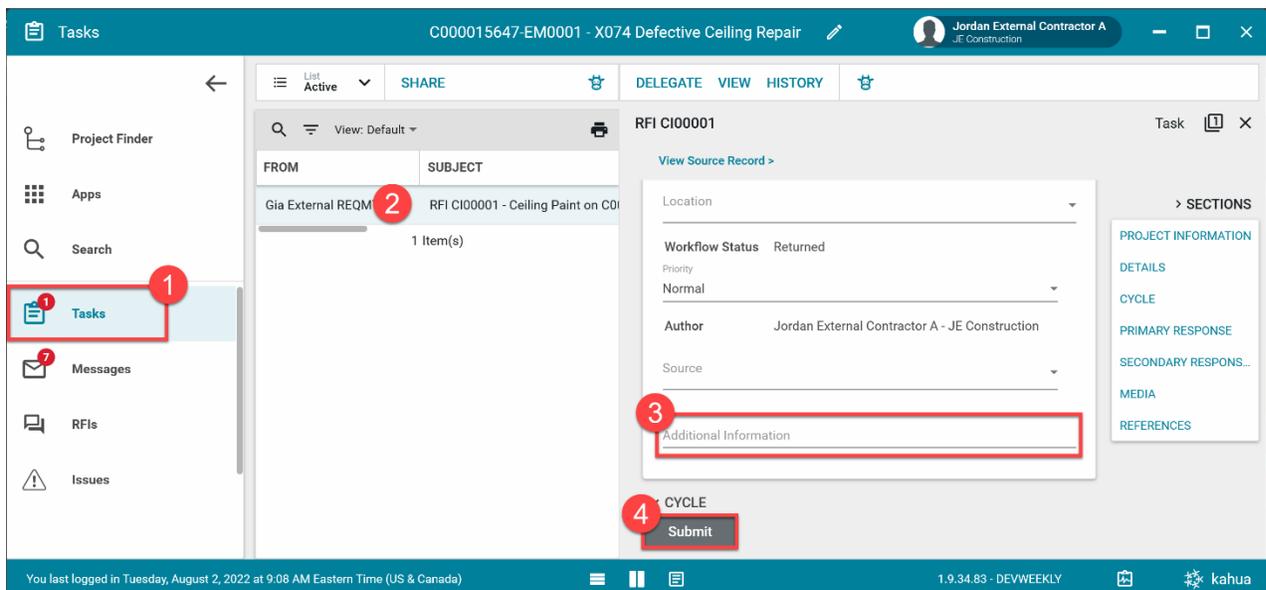


## Contractor – Provide Additional Information

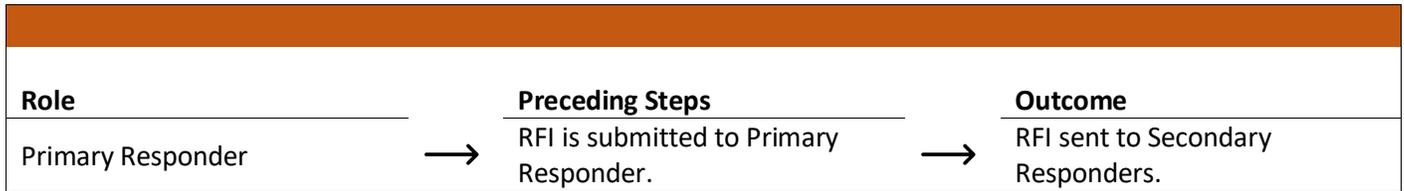
Role	Preceding Steps	Outcome
GC	Additional information is requested.	CM Project Manager receives updated information.

### Steps

- Go to 'Tasks' > Click on RFI task > Click 'Request Add Info' > Enter 'Reason for Return' > Click 'Continue'



## Primary Responder – Send to Secondary Responder



### Steps

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

The screenshot shows the EMER - Emergency interface. The left sidebar has 'Tasks' highlighted with a red circle 1. The main area shows a task for 'RFI CI00001' with a secondary responder table. The 'Insert' button is circled in red with a 3, and the selected responder 'Calvin Kwong - CKwongCo' is circled with a 4. The 'Send to Secondary Responders' button is circled with a 5.

**Note:** To remove a secondary responder, select the checkbox at the left > Select 'Delete'

The screenshot shows the EMER - Emergency interface. The left sidebar has 'Tasks' highlighted with a red circle 1. The main area shows the secondary responder table with the checkbox for 'Calvin Kwong - CKwongCo' selected (circled with a 1) and the 'Delete' button circled with a 2.

## Secondary Responder – Respond to RFI

Role	Preceding Steps	Outcome
Secondary Responder	RFI has been sent to Secondary Responder for a response.	Response provided to Primary Responder.

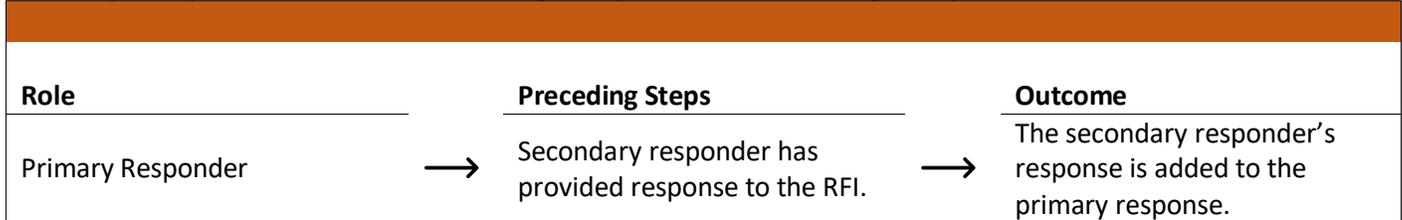
### Steps

1. Go to 'Tasks' > Click on RFI task > Enter Response > *Optional*: Upload references > Click 'Respond'

**Note:** A secondary responder can send the RFI to other secondary responders. Please see the previous section 'Primary Responder – Submit to Secondary Responder'. The process is extremely similar but takes place in the Other Secondary Responders section.

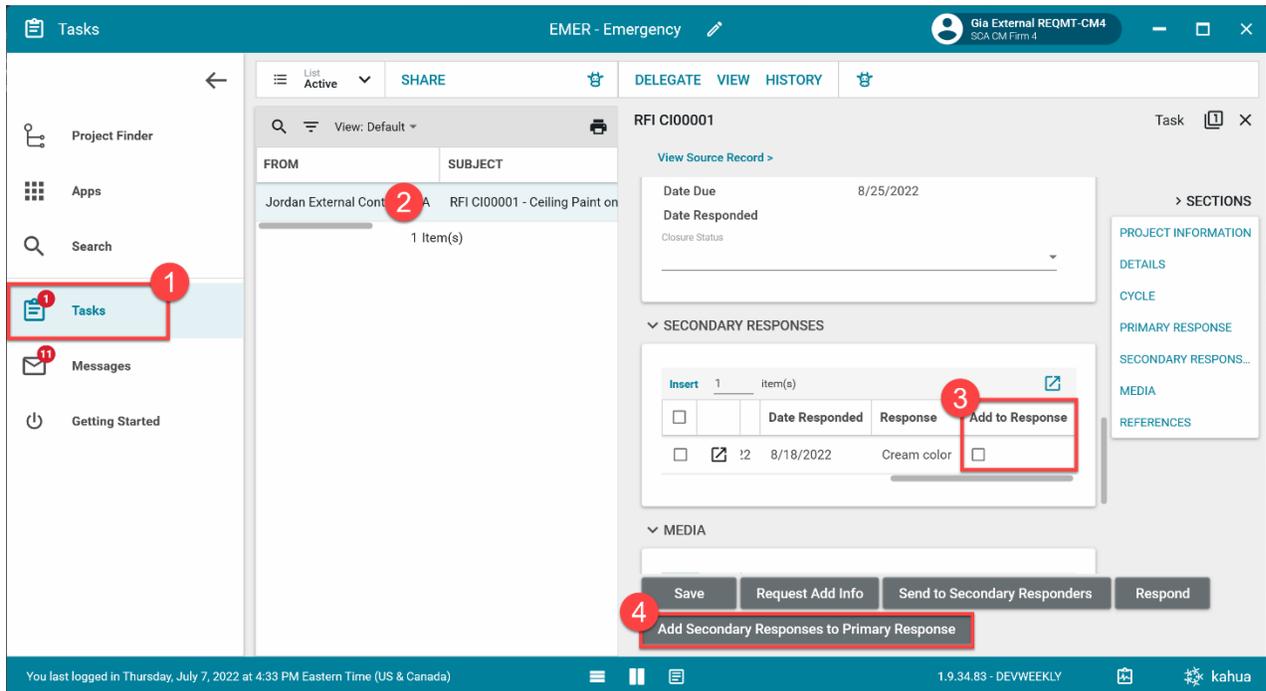
The screenshot displays the Kahua software interface for a task titled "C000015647-EM0001 - X074 Defective Ceiling Repair". The left sidebar shows navigation options like "Project Finder", "Apps", "Search", "Tasks", "Messages", and "Getting Started". The "Tasks" section is highlighted with a red circle and the number 1. The main area shows a list of tasks, with one task "Gia External REQMT" selected, indicated by a red circle and the number 2. The task details for "RFI CI00001" are shown on the right. The "MY RESPONSE" section includes fields for "Secondary Responder", "Date Sent", "Date Due", and "Date Responded". A red box and the number 3 highlight the "Response" text input field. Below this, the "Additional References" section has an "UPLOAD" button highlighted with a red circle and the number 4. At the bottom of the response form, a "Respond" button is highlighted with a red box and the number 5. The interface also shows "OTHER SECONDARY RESPONDERS" and a "Send to New Secondary Responders" button.

## Primary Responder – Add Secondary Responses to Primary Response

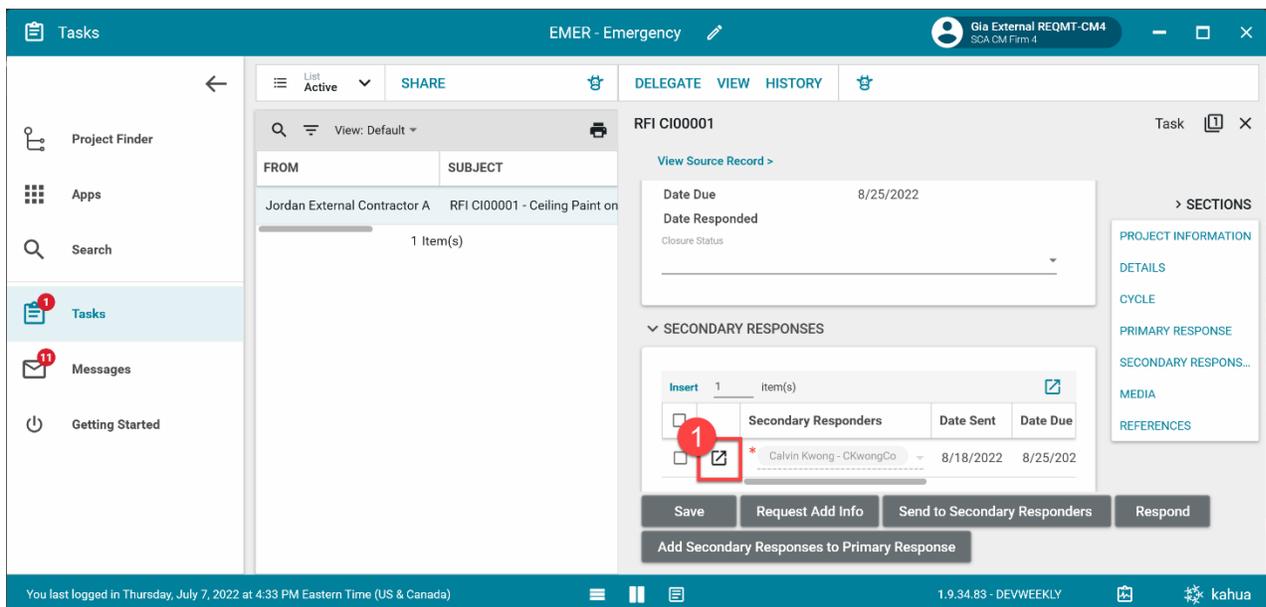


### Steps

- Go to 'Tasks' > Click on RFI task > In Secondary Responses section, select the check box in column 'Add to Response' > Click 'Add Responses to Primary Response'



- Optional:* Click the pop-out button to view any attached documents



## Primary Responder – Respond to RFI

Role	Preceding Steps	Outcome
Primary Responder	RFI is submitted to Primary Responder.	A response is provided to the contractor. Unless there is a closure status of 'NOD Required', the RFI is closed.

### Steps

- Go to 'Tasks' > Click on RFI task > In the Primary Response section, enter a 'Response' > **On Call (Limited Bid) Only:** Enter a closure status > Select 'Save / Close'.

**Note:** The closure status field will only appear for Emergency On Call (Limited Bid) projects. RFIs for all other projects will not have a closure status.

The screenshot displays the Microsoft Dynamics 365 interface for an RFI task. The left navigation pane shows 'Tasks' selected (1). The main area shows a task list with columns 'FROM' and 'SUBJECT' (2), listing 'Jordan External Contractor A' and 'RFI CI00001 - Ceiling Paint on...'. The detailed view for 'RFI CI00001' shows the 'PRIMARY RESPONSE' section with a text area for the answer (3) 'Paint the rooms a cream color', a dropdown for 'Date Responded' (4), and a 'Response' button (5). The bottom status bar indicates the user is logged in on Thursday, July 7, 2022.

## Recall RFI



### Steps

1. In the 'RFIs' application, select RFI > Click 'Recall'

The screenshot displays the 'RFIs' application interface. The top navigation bar shows the project title 'C000015647-EM0001 - X074 Defective Ceiling Repair' and the user 'Gia External REQMT-CM4'. The left sidebar contains navigation options: Project Finder, Apps, Search, Tasks, Messages (12), RFIs (selected), Notice of Direction, and Getting Started. The main content area is titled 'Official RFIs' and features a table with columns for CI Number, Subject, Workflow Status, and Official Responder. A single RFI is listed with CI Number 'CI00001', Subject 'ing Paint', and Workflow Status 'Complete'. A red circle with the number '1' highlights the 'ing Paint' subject. To the right of the table is a detailed view of the selected RFI, including 'PROJECT INFORMATION' (Expense Contract, Building ID, Design Number, LLW, Architect, Contractor) and 'DETAILS' (CI Number, Date, Subject, Question). A red box with the number '2' highlights the 'Recall' button at the bottom of the details panel. The bottom status bar shows the login time and version information.

## Initiate NOD (On Call / Limited Bid Only)

Role	Preceding Steps	Outcome
CM Project Manager	RFI has closure status of 'NOD Required'.	A new NOD is created and linked to the RFI and Issue.

### Steps

1. In the 'RFIs' application, select RFI > Click 'Initiate NOD'

The screenshot shows the 'Official RFIs' application interface. The top navigation bar includes 'RFIs', 'C000015647-EM0001 - X074 Defective Ceiling Repair', and the user profile 'Gia External REQMT-CM4 SCA CM Firm 4'. The left sidebar contains navigation options: Project Finder, Apps, Search, Tasks, Messages (11), RFIs, and Getting Started. The main content area displays a table of 'Official RFIs' with columns for CI Number, Subject, Workflow Status, and Official Res. The first row is selected, with a red circle and the number '1' highlighting the 'CI00001' entry. To the right, the 'PROJECT INFORMATION' and 'DETAILS' sections are visible. The 'DETAILS' section shows 'CI Number: CI00001', 'Date: 8/18/2022', 'Subject: Ceiling Paint', and 'Question: What is the exact color to paint the...'. At the bottom of the details panel, the 'Initiate NOD' button is highlighted with a red circle and the number '2'.

2. Click 'Start Processing'

The screenshot shows the 'Official RFIs' application interface with a 'Process' dialog box open. The dialog box contains the following sections: 'Select target partition and document type:' with 'Source: Ceiling Paint' and 'Target Application: Notice of Direction'; 'Select copies to include in references:' with two unchecked checkboxes; and 'Select references to include:' with an empty table. At the bottom of the dialog box, the 'Start Processing' button is highlighted with a red circle and the number '1'.

3. Update Details for NOD > Click Save/Close

The screenshot shows a software interface for managing a Notice of Direction (NOD). The top bar displays the user's name 'Gia External REQMT-CM4' and the current project 'C000015647-EM0001 - X074 Defective Ceiling Repair'. The main content area is divided into a left sidebar with navigation options like 'Project Finder', 'Apps', 'Search', 'Tasks', 'Messages', 'RFIs', and 'Getting Started'. The central pane shows a table with columns for 'CI Number', 'Date', 'Status', 'Priority', and 'Subject'. Below the table, there are two main sections: 'PROJECT INFORMATION' and 'DETAILS'. The 'PROJECT INFORMATION' section includes fields for 'Expense Contract', 'Building ID', 'Design Number / Package Number', 'LLW', 'Architect', and 'Contractor'. The 'DETAILS' section includes fields for 'CI Number', 'Date', 'Status', 'Priority', and 'Subject'. A red box highlights the 'Save / Close' button at the bottom of the 'DETAILS' section, with a red circle containing the number '1' next to it. The bottom status bar shows the user's login time and the application version '1.9.34.83 - DEVWEEKLY'.

Please see the Notice of Direction training guide for more information beyond this step.