

RFIs Training Guide (JOC & Emergency)

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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



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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	\rightarrow	RFI information is known.	\rightarrow	The RFI is created.

Steps

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

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

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

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

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- 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

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6. Select 'Save / Close'

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Create Linked Issue

Role		Preceding Steps		Outcome
GC	\rightarrow	RFI has been created.	\rightarrow	An Issue is created and linked to the RFI.

Steps

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

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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).

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

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Update RFI

Role		Preceding Steps		Outcome
GC	\rightarrow	RFI has not been submitted.	\rightarrow	The RFI is updated.

Steps

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

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

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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'

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Primary Responder – Request Additional Information

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

Steps

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

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Contractor – Provide Additional Information

Preceding Steps	Outcome
Additional information is requested.	\rightarrow CM Project Manager receives
	→ Preceding Steps Additional information is requested.

Steps

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

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Primary Responder – Send to Secondary Responder

Role		Preceding Steps		Outcome
Primary Responder	\rightarrow	RFI is submitted to Primary Responder.	\rightarrow	RFI sent to Secondary Responders.

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'



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

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Role		Preceding Steps		Outcome
Secondary Responder	\rightarrow	RFI has been sent to Secondary Responder for a response.	\rightarrow	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.



Primary Responder – Add Secondary Responses to Primary Response

Role		Preceding Steps		Outcome
Primary Responder	\rightarrow	Secondary responder has provided response to the RFI.	\rightarrow	The secondary responder's response is added to the primary response
<u>.</u>				prindry response.

Steps

1. 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'



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

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Primary Responder – Respond to RFI

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

Steps

1. 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.

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Recall RFI

Role		Preceding Steps		Outcome
CM Project Manager	\rightarrow	Response has been submitted. NOD has not been initiated.	\rightarrow	The CM Project Manager receives the primary responder task and can update their response.

Steps

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

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Initiate NOD (On Call / Limited Bid Only)

Role	Preceding Steps	_	Outcome
CNA Droject Manager	 RFI has closure status of 'NOD		A new NOD is created and
Civi Project Manager	Required'.	\rightarrow	linked to the RFI and Issue.

Steps

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

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2. Click 'Start Processing'

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3. Update Details for NOD > Click Save/Close

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