Request for Information (RFI)

Overview

The Request for Information (RFI) process is used by the General Contractor (GC) to ask a question or request clarification. The Construction Manager (CM) is responsible for resolving the RFI. The CM may return the RFI for clarification, forward to the Designer, or resolve it without forwarding. When the RFI is has been answered, the CM returns the process to the GC, who may request clarification on the answer or close the process.

Note: An External Stakeholder will not have access to an RFI unless they are CC'd.

Participants

The following project participants are involved in this process:

- **General Contractor (Initiator)** – Initiates the process.
- **Construction Manager -** Reviews the RFI with the responsibility of obtaining the RFI answer. Forwards the answer to the GC.
- **Designer (Optional) –** The CM may forward the RFI to the design architect or design engineer who will derive an RFI answer.

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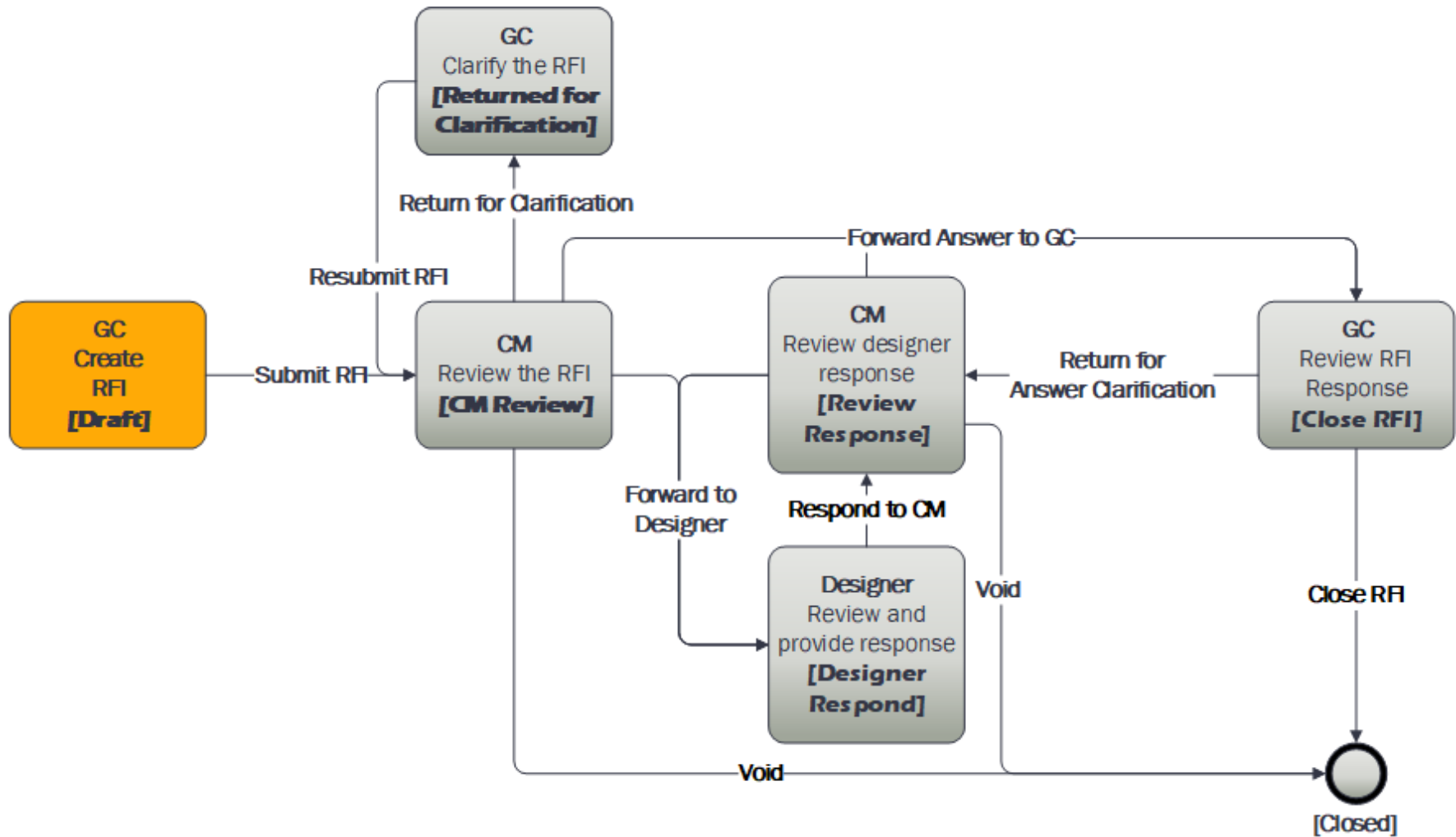
Work Instruction

GC Start

GC Create RFI [Draft]

The PHAZE user completes required fields and submits the RFI process instance.

Initiator Starts RFI

There are two ways to start a process in PHAZE, a) via the Start a Process button on the home page, or b) in the Project Actions menu.

a) Click the **Start a Process** button on the main screen. A dropdown menu will display showing the option to create an RFI. See Figure 1

Optionally:

b) Click the ☰ button in the top left corner of the PHAZE home screen. Find **Project Actions**, click the **RFIs** button in the left menu. The new Issue form displays. See Figure 1
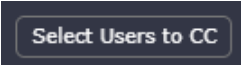
Figure 1 – Start a Process.

> ✎ **Note: If you do not see the process when you click "Start a Process", you may not have permission to create it. Contact your administrator for assistance.**

Figure 1 – RFI Process

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Request for Information (RFI)

1. Enter the RFI information into the form fields. Fields shaded in red are required.

Subject	Enter a brief descriptive title for the process instance. Follow your organization's naming convention if provided.
Category	Select the value from the picklist that best represents the type of RFI that is being submitted. Use *None of the above* if a more specific value is not available.
Problem Description	Enter a summary of the problem description
Requested Information	Enter in the question that needs clarification
Qualifications	Optionally, provide Qualifications
Statement	Provide an optional statement regarding the need for information.
Suggested Solution	Optionally, provide a suggested solution.
Ball in Court	Use the **Ball in Court** (BiC) picklist to add a Construction Manager (CM) to the RFI. The selected CM must answer the RFI one submitted. Figure 4: Select BiC participants.

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2. Optionally, select users to CC by clicking the button: <kbd>Select Users to CC</kbd>

   2.1. Select one or many PHAZE users to carbon copy the RFI to. These participants will be notified to view, comment and/or attach documents. CC'd users do not have BiC responsibility. See Figure 5.
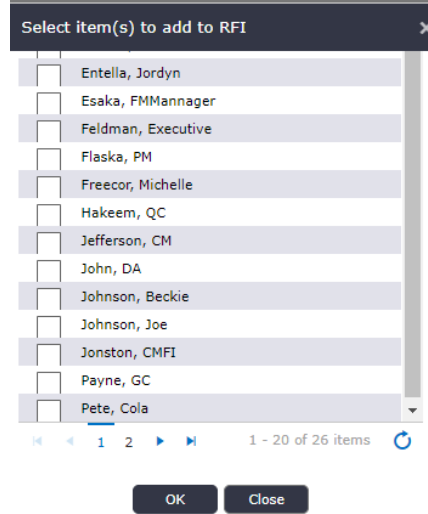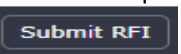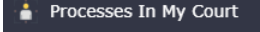

Figure 2 Select CC participants.

3. Optionally, attach any supporting documents.

   3.1. Click the <kbd>Add Documents</kbd> button and then the <kbd>Select files...</kbd> button to attach documents. See the *Add Documents Quick Reference Guide* for detailed instructions on attaching documents.

   3.2. Optionally, add a comment by clicking the <kbd>Add Comment</kbd> button. See the *Add Comment Quick Reference Guide* for detailed instructions on adding comments.

4. When you have filled in all the required form fields and attached all supporting information, click the <kbd>Submit RFI</kbd> button to submit the process to the CM.

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CM
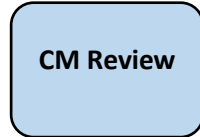
CM Review

Construction Manager Review RFI

1. The CM will check the [Processes In My Court] section of PHAZE which will reveal the processes that are assigned. Select the RFI to be answered.
   1.1 Review the RFI. Read the information provided by the GC on the form and check all attachments and comments.
2. After reviewing the RFI, either (See Figure):
   2.1 Use the **Return for Clarification** button in the action bar if question clarification is required from the GC.
   2.2 Use the **Forward to Designer** button in the action bar, to assign Ball in Court to the Designer if the Design Architect or Design Engineer must assist.
       2.2.1 After clicking the button, select the Designer from the list and click the **Continue** button.
   2.3 Use the **Forward Answer to General Contractor** button in the action bar once an answer is derived. *See page 9 of this document.*
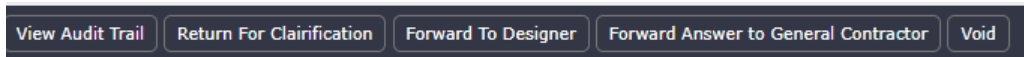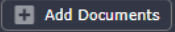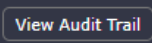   2.4 Use the **Void** button in the action bar if the RFI should be voided.

| View Audit Trail | Return For Clairification | Forward To Designer | Forward Answer to General Contractor | Void |
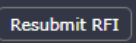
Figure - RFI take action bar

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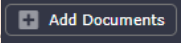| OPTIONAL	
This step only occurs if the **Construction Manager** is returning the RFI to the Initiator.	
Construction Manager **Return for Clarification**	If the RFI process requires revisions, the Construction Manager returns The process to the Initiator. **Return for Clarification** 1. Locate and open the RFI that you wish to return. 3. Click the **Return for Clarification** button in the action bar. 4. A popup notice will inform you to "Enter an explanation for why you are returning" Click the OK button. 5. Enter a comment explaining the reason for returning the RFI. 6. Click the **Continue** button in the bottom left corner of the form. 4. The RFI will be returned to the GC.
OPTIONAL	
This step only occurs if the General Contractor has returned the RFI to the Construction Manager.	

General Contractor
 	
Returned for Clarification
	If the Construction Manager returns the process to the General Contractor, the GC makes any corrections as required and resubmits.
	GC Updates RFI
	1. Click the **My Tasks** button on the home page. Locate and open the RFI that requires revision.
	2. Review the comment(s) explaining why the RFI was returned.
	3. Update any required information per the return comment(s).
	4. Optionally, attach any supporting documents.
	
	  Click the ⊞ Add Documents button and then the Select files... button to attach documents. See the *Add Documents Quick Reference Guide* for detailed instructions on attaching documents.
	5. Click the **Resubmit RFI** button in the take action bar:
	
	  [View Audit Trail] [Resubmit RFI]
	
	6. A popup notice will inform you "Please give a description of the changes you made or justify your resubmission." Click the OK button.
	7. Enter a comment explaining the changes made to the RFI. If attachments provide the explanation, type "See attachment(s)."
	8. Click the **Continue** button in the bottom left corner of the form.
	9. The RFI will be returned to the CM that it was previously assigned to.

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OPTIONAL	
This step only occurs if the **Construction Manager** is Forwarding the RFI to the Designer.	
Designer **Designer Respond**	The Designer will receive an email notification that the RFI requires action. **Review and provide response** 1. Click the **My Tasks** button on the home page. Locate and open the RFI for which the notification was received. Open the RFI that requires your input. 2. Provide Comment on the RFI. 3. Optionally, click the [Add Documents] button and then the [Select files…] button to attach documents. See the *Add Documents Quick Reference Guide* for detailed instructions on attaching documents. 4. Click the **Respond to Construction Manager** in the take action task bar. 5. A popup notice will inform you "Please provide a comment for the Construction Manager's review." Click the **OK** button. 6. Enter a comment. 7. Click the Continue button in the bottom left corner of the form. 8. The RFI will be returned to the CM that it was previously assigned to.

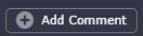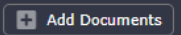| OPTIONAL	
This step only occurs if the Designer has returned the RFI to the CM.	
Construction Manager **Review Response**	If the Designer returns the process to the Construction Manager, the Construction Manager then reviews the Designer's response. **Review Designer Response** 1. Locate and open the RFI. 2. Review the comment(s) and any attachments from the Designer. 3. If the answer has been derived, the select ***Forward answer to General Contractor*** button. 3.1 Otherwise, select the appropriate action from the take action bar and repeat the previous steps as required.

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Construction Manager

| Forward answer to GC |

General Contractor

| Close RFI |

Forward answer to GC

For the scenario where the CM requires no question clarification and no input from the Designer, the CM can provide a Response and return the RFI to the GC.

1. Review the RFI details as submitted by the GC.
2. Optionally, add a comment by clicking the [Add Comment] button. See the *Add Comment Quick Reference Guide* for detailed instructions on adding comments.
3. Optionally, click the [Add Documents] button and then the [Select files...] button to attach documents. See the *Add Documents Quick Reference Guide* for detailed instructions on attaching documents.
4. Enter the official response in the **Response** form field. PHAZE will not permit you to forward the answer to the GC without a response.
5. Click the **Forward answer to General Contractor** button in the take action task bar.

Review RFI Response

The General Contractor will receive an email notification providing that the RFI requires action.

1. Click the **My Tasks** button on the home page. Locate and open the RFI for which the notification was received.
2. Read the **Response** provided by the CM and review applicable attachments and comments.
   2.1 If satisfied with the provided response, click the **Close RFI** button in the take action task bar.
   2.2 Otherwise, use the **Return For Answer Clarification** button to return the RFI to the CM.

[Cancel] [View Audit Trail] [Return For Answer Clarification] [Close RFI]

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