

# Request for Information (RFI) Instructions (SharePoint)

## Contractor Creates a New RFI

**Request for Information**

Form Security: Project Team  
**\*\*All times are Mountain Standard Time\*\***

**Last Updated:**

RFI Number: 1 RFI Date: 5/2/2012  
Priority: Standard Potential Cost Impact:  RFI Started By:  
Response Requested By: 5/12/2012 Potential Schedule Impact:  Current Responsible Party:  
Subject: RFI - Example

**Attachments**(Any delete or move action will occur on the form save!)

**Question/Response Section** (All Submits/Saves must have a "Comment" and "Send To" filled out)

**Action Section** (Attach files, add comments)

Project Team:  Question:  Comment For: Project Team  
NPS/CMR/AE:  Click here to attach a file Response:  Send To: CMR  
NPS Secure:   
 Insert Attachment

Please respond to this question

Submit Form Close Form

### View 1

When a contractor selects RFI forms from the menu, they will get the form shown in View 1.

1. The RFI number will be automatically assigned by SharePoint.
2. The RFI Date will automatically be filled in, but can be overwritten.
3. Priority can be set to:
  - a. Standard – 10 day response
  - b. Expedited – 5 day response
  - c. Critical – 2 day response
  - d. The priority status will automatically fill in the "Response Requested By:" date.
  - e. The "Response Requested By:" date can be overwritten if required. The date does not obligate NPS to respond by the selected date. The RFI will be processed in a timely manner based on criticality.
4. If the contractor anticipates that this RFI has potential cost and/or schedule impacts, the appropriate check box should be selected. If one of the checkboxes is selected the contractor needs to provide an explanation of what the impact will be.
5. The subject should give enough detail so that the CMR, COR and A/E can easily determine what the RFI refers to and so that it can be located in the RFI log in the future.

## The Action Section

**Action Section (Attach files, add comments)**

Project Team:       Question:       Comment For: Project Team

NPS/CMR/AE:       Click here to attach a file      Response:       Send To: CMR

NPS Secure:

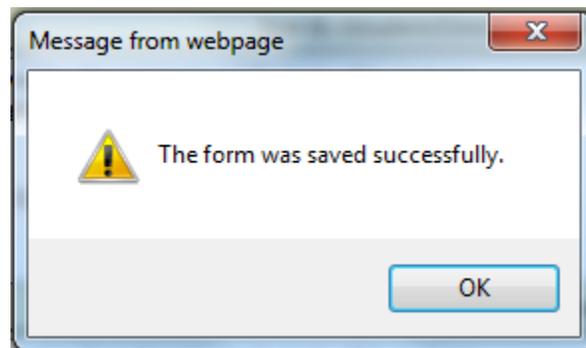
Insert Attachment

Please respond to this question

Submit Form      Close Form

### View 2

1. Once the subject is filled in the contractor should go to the Action Section show in View 2.
2. The contractor will select the “Send To:” drop down and will select CMR, this is the only choice available to the contractor.
3. The contractor will then describe the question to be answered in the text box below the “Send To:” box.
4. The contractor will select the “Click here to attach a file” button If there are any sketches, drawings, specifications or other documents that need to be attached to further clarify the question. If more than one document is to be attached, each document will have to be attached separately.
  - a. The radio button for Project Team should be selected otherwise the form cannot be submitted.
5. When all steps described above are completed, select the “Submit Form” button.
6. If all fields have been filled out correctly the following message will be displayed.



7. An e-mail will be sent to the CMR notifying them of the RFI.

## CMR Reviews RFI

**Request for Information**

Form Security: NPS  
**\*\*All times are Mountain Standard Time\*\***

**Last Updated:** By tpapich(Construction Contractor) sent to CMR on 5/2/2012 1:36:39 PM

RFI Number: 1 RFI Date: 5/2/2012  
Priority: Standard Potential Cost Impact:  RFI Started By: tpapich  
Response Requested By: 5/12/2012 Potential Schedule Impact:  Current Responsible Party: CMR  
Subject: RFI - Example

**Attachments**(Any delete or move action will occur on the form save!)

**Question/Response Section** (All Submits/Saves must have a "Comment" and "Send To" filled out)

Question: Please respond to this question  
Project Team:

Save By tpapich(Construction Contractor) on 5/2/2012 1:36:38 PM {Sent to - CMR}

**Action Section** (Attach files, add comments)

Project Team:  NPS/CMR/AE:  NPS Secure:   Insert Attachment

Question:  Response:  Comment For: NPS Send To: \*

Click here to attach a file

Save Form Close Form

### View 3

The CMR will receive e-mail notification that an RFI has been submitted by the contractor. Click on the link which will take you to the site and open the RFI (see View 3).

1. Review the RFI.
  - a. If the "Response Requested By:" date is unreasonable in the CMR's opinion it can be changed.
  - b. If the Potential Cost Impact or the Potential Schedule Impact are checked, make sure supporting documentation is attached. If it is not attached, uncheck the box.
2. Review the question and determine if the answer is clearly contained within the contract documents. If it is, fill out the text box (see Action section in view below) with specific references to the contract documents on where the answer can be found.
3. If the CMR feels the question should be forwarded to the A/E to allow them to address the issue, the CMR should indicate this in the comment section.
4. Forward RFI to COR.
  - a. Go to the "Action Section."
    - i. Check the "Response" button.
    - ii. Have the "Comment For:" set to NPS.
    - iii. Change "Send To;" to COR.
    - iv. Attach any documents that may be required.



# Request for Information

Form Security:   
**\*\*All times are Mountain Standard Time\*\***

**Last Updated:** By tpapich(Construction Contractor) sent to CMR on 5/2/2012 1:36:39 PM

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RFI Number:  RFI Date:

Priority:  Potential Cost Impact:  RFI Started By: **tpapich**

Response Requested By:  Potential Schedule Impact:  Current Responsible Party: **CMR**

Subject:

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**Attachments**(Any delete or move action will occur on the form save!)

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**Question/Response Section** (All Submits/Saves must have a "Comment" and "Send To" filled out)

Question:

Project Team:

*Save By tpapich(Construction Contractor) on 5/2/2012 1:36:38 PM (Sent to - CMR)*

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**Action Section** (Attach files, add comments)

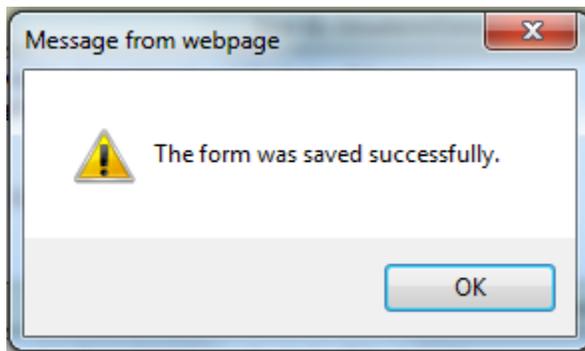
Project Team:  Question:  Comment For:

NPS/CMR/AE:   Response:  Send To:

NPS Secure:

Insert Attachment

- b. When all steps described above are completed, select the “Save Form” button.
- c. If all fields have been filled out correctly the following message will be displayed.



- d. An e-mail will be sent to the COR notifying them of the RFI .

## COR Reviews RFI from CMR

**Request for Information**

Form Security: NPS  
**\*\*All times are Mountain Standard Time\*\***

**Last Updated:** By tpapich(CMR) sent to COR on 5/2/2012 2:12:12 PM

RFI Number: 1 RFI Date: 5/2/2012  
Priority: Standard Potential Cost Impact:  RFI Started By: tpapich  
Response Requested By: 5/12/2012 Potential Schedule Impact:  Current Responsible Party: COR  
Subject: RFI - Example

**Attachments**(Any delete or move action will occur on the form save!)

**Question/Response Section** (All Submits/Saves must have a "Comment" and "Send To" filled out)

Question: Please respond to this question  
Project Team: [Dropdown]

Save By tpapich(Construction Contractor) on 5/2/2012 1:36:38 PM {Sent to - CMR}

Response: CMR recommendations here  
NPS: [Dropdown]

Save By tpapich(CMR) on 5/2/2012 2:12:12 PM {Sent to - COR}

**Action Section** (Attach files, add comments)

Project Team:  Question:  Comment For: NPS  
NPS/CMR/AE:  Click here to attach a file Response:  Send To: [Dropdown]  
NPS Secure:   
 Insert Attachment

Save Form Close Form

### View 4

The COR will receive an e-mail notification that an RFI has been forwarded by the CMR. Click on the link which will take you to the site and open the RFI (see View 4).

1. Review the RFI.
  - a. If the "Response Requested By:" date is unreasonable in the COR's opinion it can be changed.
2. Notice the Question from the contractor and the Response from the CMR are visible and indicate who submitted them, their role and the date and time.
3. If the COR feels the RFI is incomplete (drawings not attached, question unclear, etc.), they can send it back to the contractor and ask for clarification.
4. If the COR agrees this should be answered by the A/E
  - a. Go to the "Action Section".
    - i. Check the "Response" button.
    - ii. Have the "Comment For:" set to NPS.
    - iii. Change "Send To;" to A/E.
    - iv. Attach any documents that may be required.
  - b. Fill out the text box with your recommendations /comments for the A/E.



# Request for Information

Form Security: NPS  
**\*\*All times are Mountain Standard Time\*\***

**Last Updated:** By tpapich(CMR) sent to COR on 5/2/2012 2:12:12 PM

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RFI Number:  RFI Date:

Priority:  Potential Cost Impact:

Response Requested By:  Potential Schedule Impact:  RFI Started By: **tpapich**

Subject:  Current Responsible Party: **COR**

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**Attachments**(Any delete or move action will occur on the form save!)

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**Question/Response Section** (All Submits/Saves must have a "Comment" and "Send To" filled out)

Question:

Project Team:

*Save By tpapich(Construction Contractor) on 5/2/2012 1:36:38 PM {Sent to - CMR}*

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Response:

NPS

*Save By tpapich(CMR) on 5/2/2012 2:12:12 PM {Sent to - COR}*

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**Action Section** (Attach files, add comments)

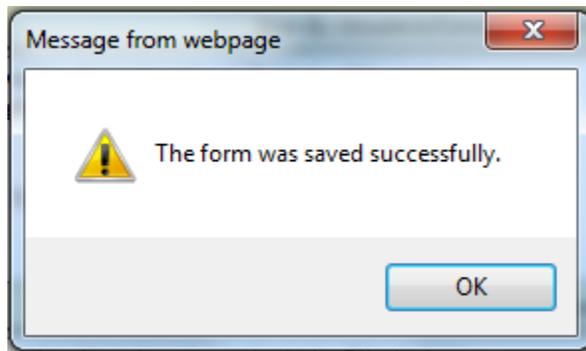
Project Team:  Question:  Comment For:

NPS/CMR/AE:   Response:  Send To:

NPS Secure:

Insert Attachment

- c. When all steps described above are completed, select the "Save Form" button.
- d. If all fields have been filled out correctly the following message will be displayed.



- e. An e-mail will be sent to the A/E notifying them of the RFI.

## A/E Reviews RFI from COR



# Request for Information

Form Security: AE  
**\*\*All times are Mountain Standard Time\*\***

**Last Updated:** By tpapich(COR) sent to AE on 5/2/2012 2:46:44 PM

RFI Number:  RFI Date:

Priority:  Potential Cost Impact:

Response Requested By:  Potential Schedule Impact:  RFI Started By: **tpapich**

Subject:  Current Responsible Party: **AE**

**Attachments**(Any delete or move action will occur on the form save!)

**Question/Response Section** (All Submits/Saves must have a "Comment" and "Send To" filled out)

Question:   
Project Team:   
*Save By tpapich(Construction Contractor) on 5/2/2012 1:36:38 PM (Sent to - CMR)*

Response:   
NPS:   
*Save By tpapich(CMR) on 5/2/2012 2:12:12 PM (Sent to - COR)*

Response:   
NPS:   
*Save By tpapich(COR) on 5/2/2012 2:46:44 PM (Sent to - AE)*

**Action Section** (Attach files, add comments)

Project Team:  Question:  Comment For:   
NPS/CMR/AE:   Response:  Send To:   
NPS Secure:

### View 5

The A/E will receive e-mail notification that an RFI has been forwarded by the COR. Click on the link which will take you to the site and open the RFI (see View 5).

1. Review the RFI.
2. Notice the Question from the contractor and the Response from the CMR and COR are visible and indicate who submitted them, their role and the date and time.
3. Go to the "Action Section".
  - a. Check the "Response" button.
  - b. Have the "Comment For:" set to NPS.
  - c. Change "Send To;" to COR.
  - d. Attach any documents that may be required.
  - e. Fill out the text box with your recommendations /comments for the COR.



# Request for Information

Form Security: AE  
**\*\*All times are Mountain Standard Time\*\***

**Last Updated:** By tpapich(COR) sent to AE on 5/2/2012 2:46:44 PM

RFI Number: 1	RFI Date: 5/2/2012	Priority: Standard	Potential Cost Impact: <input type="checkbox"/>
Response Requested By: 5/12/2012	Potential Schedule Impact: <input type="checkbox"/>	RFI Started By: tpapich	Current Responsible Party: AE
Subject: RFI - Example			

**Attachments**(Any delete or move action will occur on the form save!)

**Question/Response Section** (All Submits/Saves must have a "Comment" and "Send To" filled out)

Question: Please respond to this question  
 Project Team: Project Team

*Save By tpapich(Construction Contractor) on 5/2/2012 1:36:38 PM (Sent to - CMR)*

Response: CMR recommendations here  
 NPS: NPS

*Save By tpapich(CMR) on 5/2/2012 2:12:12 PM (Sent to - COR)*

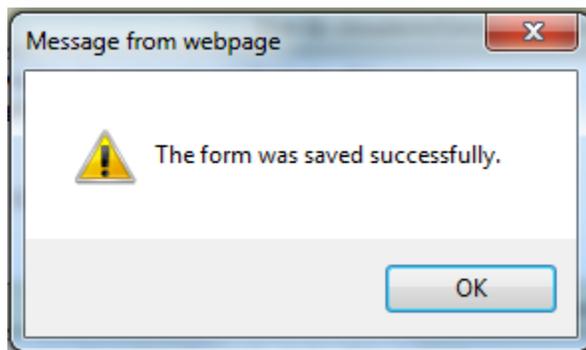
Response: Comments from the COR to the AE  
 NPS: NPS

*Save By tpapich(COR) on 5/2/2012 2:46:44 PM (Sent to - AE)*

**Action Section** (Attach files, add comments)

Project Team: <input checked="" type="radio"/> Project Team NPS/CMR/AE: <input type="radio"/> NPS/CMR/AE NPS Secure: <input type="radio"/> NPS Secure	<input type="button" value="Click here to attach a file"/>	Question: <input type="radio"/> Question Response: <input checked="" type="radio"/> Response	Comment For: <span style="border: 1px solid #ccc; padding: 2px;">NPS</span> Send To: <span style="border: 1px solid #ccc; padding: 2px;">COR</span>
<input checked="" type="checkbox"/> Insert Attachment		Response from the AE to the COR	

- f. When all steps described above are completed, select the "Save Form" button.
- g. If all fields have been filled out correctly the following message will be displayed.



- f. An e-mail will be sent to the COR notifying them of the RFI.

# RFI Form – COR Reviews RFI from A/E

**Request for Information**

Form Security: NPS  
**\*\*All times are Mountain Standard Time\*\***

**Last Updated:** By tpapich(A/E) sent to COR on 5/2/2012 2:51:47 PM

RFI Number: 1 RFI Date: 5/2/2012  
Priority: Standard Potential Cost Impact:  RFI Started By: tpapich  
Response Requested By: 5/12/2012 Potential Schedule Impact:  Current Responsible Party: COR  
Subject: RFI - Example

**Attachments**(Any delete or move action will occur on the form save!)

**Question/Response Section** (All Submits/Saves must have a "Comment" and "Send To" filled out)

Question: Please respond to this question  
Project Team

Save By tpapich(Construction Contractor) on 5/2/2012 1:36:38 PM {Sent to - CMR}

Response: CMR recommendations here  
NPS

Save By tpapich(CMR) on 5/2/2012 2:12:12 PM {Sent to - COR}

Response: Comments from the COR to the AE  
NPS

Save By tpapich(COR) on 5/2/2012 2:46:44 PM {Sent to - AE}

Response: Response from the AE to the COR  
NPS

Save By tpapich(A/E) on 5/2/2012 2:51:47 PM {Sent to - COR}

**Action Section** (Attach files, add comments)

Project Team:  Question:  Comment For: NPS  
NPS/CMR/AE:  Click here to attach a file Response:  Send To: \*  
NPS Secure:   
 Insert Attachment

Save Form Close Form

## View 6

The COR will receive e-mail notification that an RFI has been forwarded by the A/E. Click on the link which will take you to the site and open the RFI (see View 6).

1. Review the RFI.
2. Notice the Question from the contractor and the Response from the CMR, the original comments from the COR and the A/E response are visible and indicate who submitted them, their role and the date and time.
  - a. All of the "Response:" security levels are set to "NPS".
  - b. All documents attached by the COR and/or A/E are set to "NPS/CMR/A/E".
3. Go to the "Action Section".
  - a. Check the "Response" button.
  - b. Have the "Comment For:" set to Project Team.

- c. Change "Send To;" to Contractor.
- d. Attach any documents that may be required.
- e. Fill out the text box with your recommendations /comments for the COR.



## Request for Information

Form Security:   
**\*\*All times are Mountain Standard Time\*\***

**Last Updated:** By tpaich(A/E) sent to COR on 5/2/2012 2:51:47 PM

RFI Number: <input type="text" value="1"/>	RFI Date: <input type="text" value="5/2/2012"/>		
Priority: <input type="text" value="Standard"/>	Potential Cost Impact: <input type="checkbox"/>	RFI Started By: <b>tpaich</b>	
Response Requested By: <input type="text" value="5/12/2012"/>	Potential Schedule Impact: <input type="checkbox"/>	Current Responsible Party: <b>COR</b>	
Subject: <input type="text" value="RFI - Example"/>			

**Attachments**(Any delete or move action will occur on the form save!)

**Question/Response Section** (All Submits/Saves must have a "Comment" and "Send To" filled out)

Question:

Project Team

*Save By tpaich(Construction Contractor) on 5/2/2012 1:36:38 PM {Sent to - CMR}*

Response:

NPS

*Save By tpaich(CMR) on 5/2/2012 2:12:12 PM {Sent to - COR}*

Response:

NPS

*Save By tpaich(COR) on 5/2/2012 2:46:44 PM {Sent to - AE}*

Response:

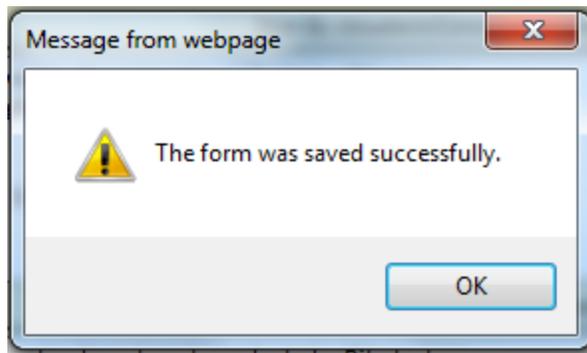
NPS

*Save By tpaich(A/E) on 5/2/2012 2:51:47 PM {Sent to - COR}*

**Action Section** (Attach files, add comments)

Project Team: <input checked="" type="radio"/> NPS/CMR/AE: <input type="radio"/> NPS Secure: <input type="radio"/> <input checked="" type="checkbox"/> Insert Attachment	<input type="text" value="Click here to attach a file"/>	Question: <input type="radio"/> Response: <input checked="" type="radio"/>	Comment For: <input type="text" value="Project Team"/> Send To: <input type="text" value="Contractor"/>
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- f. If the COR would like the contractor to see the responses and/or attachments from the CMR or A/E.
  - i. For the responses go to the drop down box and change it from NPS to Project Team.
  - ii. For the attachments change the radio button from NPS/CMR/AE to Project Team.
- g. When all steps described above are completed, select the "Save Form" button.
- h. If all fields have been filled out correctly the following message will be displayed.



- g. An e-mail will be sent to the Contractor notifying them of the RFI response.