Reviewing Requests for Information (RFIs)

Overview: RFIs submitted by vendors require review prior response. The process includes the ability for A/Es to get UH reviewer comments use the TEAM INPUT feature.

Reference: N/A

	1- Click on FORMS			2- Click on Request for Information
	< PM∦/eb	(Portfolio) > Home > C	Controls Custom forms	
1	PLANNING	Submittals	Bonds	
-	\$ COST MANAGEMENT	Meeting Minutes Plan Review	Certificate of Final Completion	
		UH Inspector Reports Open Items List	Construction Sign	
	ASSET	Action Items/Checklists Document Manager	Design Review - Executiv e Approval	
		PMWeb Viewer	Notice to Proceed	

3- OR, click on the link provided in the PM Web notification e-mail.

Workflow Inbox			Due	- 2 ∞ ×
Record <u>RFIs - 002</u> Description Testing RFIs Instructions	Project/Location1000263-Interim - Nick Merry Test	Due 03-05-2024 Progress Step 1 of 2		

4- OR, select from the Workflow Inbox in your PM Web home screen

Design Team Reviewer

- Select the MAIN tab and review the QUESTION and PROPOSED SOLUTION boxes submitted.
- 6- Select the ATTACMENTS tab and review any attached documents.
- **7-** If the RFI requires UH review, use the TEAM INPUT feature in workflow go to step 12 for TEAM INPUT steps.
- 8- When review is complete, enter a response in the ANSWER box on the MAIN tab.
- 9- Add any necessary attachments in the ATTACHMENTS tab.
- **10-** Under the WORKFLOW tab, select the SUBMIT button.
- **11** Select the appropriate action from the ACTION list (RESUBMIT, RETURN, FINAL APPROVE), then click on **SAVE**.

TEAM INPUT

12- To forward the submittal for input from additional team members with PM Web accounts, under the **WORKFLOW** tab, select the **TEAM INPUT** button

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ACTIONS				
0	APPROVE RETURN	Please review comments and proceed as directed		
00	REJECT WITHDRAW FINAL APPROVE			
000	DELEGATE			
	SAVE			
	TEAM INPUT (0)			

13- In the popup window, select team members to receive edit rights for the record. You can start typing a name to refine the list.

TEAM INPUT	
Step Approver	2 - Architect - Engineer Firm 1 NickM - Nick Merry
Request Team Input 13	admin - admin
Can Edit Record	
Can Edit Notes	
Can Edit Attachments	
Message	
15	

- **14-** Check boxes for edit rights to be given.
- **15-** Enter any comments in the **Message** box
- 16- Click on the Save & Exit button.
- **17- IMPORTANT**, you <u>MUST</u> then click on the **SAVE** button under ACTIONS for the TEAM INPUT to be sent.