

Kahua Quick Reference Guide

Request for Information (RFI)

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The RFI application allows an RFI Author to initiate an RFI and route it through the Primary Responder and optional Secondary Responders for review. The app maintains a log of all RFIs in the project and has a built-in workflow to manage through a response. The RFI application may be used by external parties to collaborate, review, and respond accordingly. In addition to the workflow below, with the proper configuration the Owner or Owner Representative may also be included in the workflow. For more details on Owner workflow, reach out to Kahua Support.

Navigating to RFIs

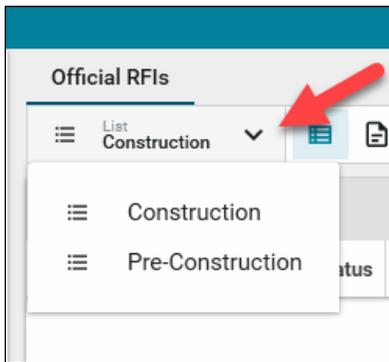
1. Open the project using Project Finder on the left side bar.
2. Select “**RFIs**” from the App launcher.

Creating a New RFI

RFIs are typically created by the following roles: **GSA-PM/COR**, **GSA Staff/SMEs**, **EXT-CMa**, and **GC/Design Builder**.

RFI App

1. Click the **Type** dropdown and select the appropriate RFI type. This list defaults to Construction.



2. Click **New** to open the RFI form. All required fields are marked in red.

Details Section

3. Enter the **Subject**. This is a required field and data must be entered to save the record.
4. Click the dropdown arrow to select the **Reason for the RFI**.

Note: To quickly locate the reason, you may begin typing in the field and select from the filtered list.

5. Click the dropdown arrow and select the **Priority**.
6. Enter the **Question**.
7. Add any additional information important for project reporting.

Owner's Representative Section

8. If applicable, enter the name of the **Owner's Representative**.

Note: If the name is filled in and the box in step 11 is not checked, the RFI will go to this person before being sent to the Primary Responder. This field may be set to automatically populate with the name of a specific team member for all Project RFIs. Please reach out to your regional KPM for setup assistance.

9. The date fields in this section will autopopulate as the document is workflowed and responded to.

Primary Response Section

10. Enter the name of the **Primary Responder**.

Note: As with the Owner's Representative, this field may be set up to automatically populate with a designated Primary Responder for the project. Please reach out to your regional KPM for setup assistance.

11. Check the box to **Auto Send to Primary Responder** if you would like the RFI to be sent to the Primary Responder at the same time it is sent to the Owner's Representative.
12. Enter any applicable information in the **Instructions to Primary Responder** field.
13. Enter the **Due Date** the response is required from the Primary Responder.

Comments Section

14. If applicable, enter information in the **Comments** field.

Media Section

- 15. If applicable, click **ADD** to attach a thumbnail view of any supporting photos.
- 16. To include the photo(s) in the printable portable view, click **INCLUDE FOR PRINT**.
- 17. To add additional details to the photo, click on the thumbnail view of the photo. When complete, click **Done**.

References Section

18. To attach a document that does not exist within the project, click the **Upload** button.

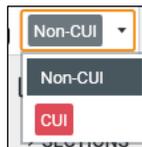
Note: If you are using the Kahua desktop app, multiple documents can be uploaded at one time.

19. To attach a document that exists within the project, click the **Add Kahua Doc** button.

Controlled Unclassified Information/Non-Controlled Unclassified Information

20. In the top right-hand corner of the form, select **CUI** or **Non-CUI**.

Note: External users will not have access to view CUI forms.



Save

- 21. If you wish to save the RFI and continue to make edits before sharing with others, use one of the following options on the Save menu:
 - a. **Save** saves the RFI and allows the author to continue to edit.
 - b. **Save/New** saves and closes the RFI and opens a new RFI form.
 - c. **Save/Close** saves the RFI and closes the RFI Edit window.
- 22. Once saved, the RFI record will be included in the Log View.

Note: Save, and save often when working in Kahua.

Edit an RFI

- 23. To edit an RFI, return to the RFI app.
- 24. Click the **RFI title** in the log to open the record.
- 25. Click the **Edit** button.
- 26. Make any applicable changes.



27. Click **Save** to return later for additional edits, or click **Submit** to send to the appropriate parties.

Submit the RFI

28. When ready to share the RFI with the appropriate parties, click the **Submit** button.
 - a. This saves the RFI and sends it to the Primary Responder. The Primary Responder will receive an email message a task will be created in Kahua.
 - b. The status of the RFI will change to "In Review" and the Assigned to field will indicate the RFI is outstanding with the Primary Responder.

Recall an RFI

29. To recall an RFI, click the **Recall** button at the bottom of the form. This will stop the workflow process and close any open tasks. Those with open tasks for the RFI will receive a notification the RFI has been recalled. The RFI will need to be resubmitted to restart the process.

Owner's Representative Response

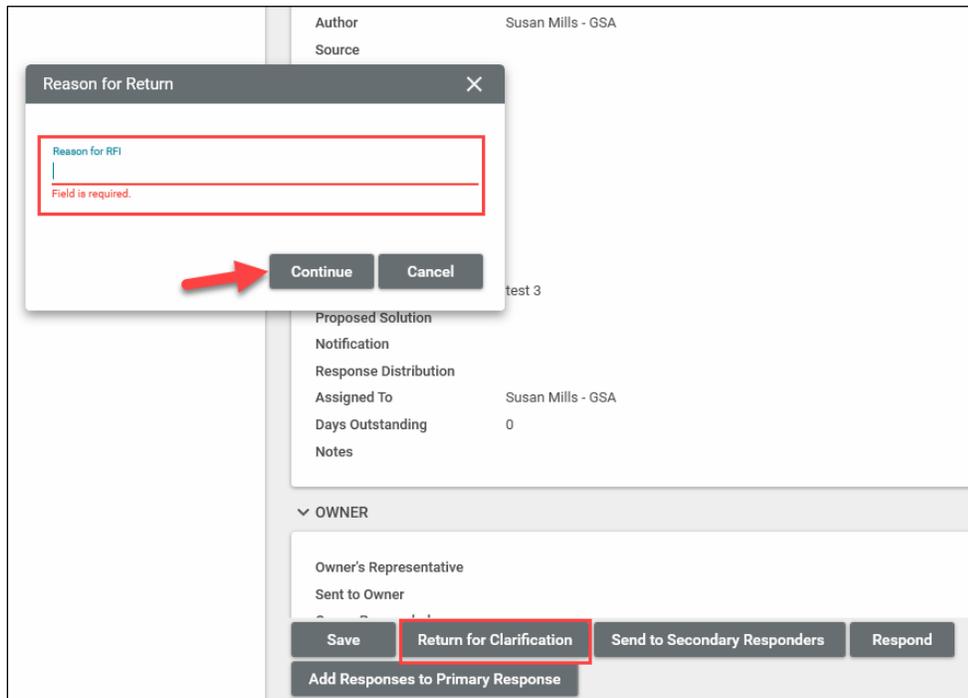
This activity is typically managed by the following roles: **GSA-PM** or **EXT-CMa**.

1. The Owner's Representative can access the RFI using one of several different methods:
 - a. Task Notification contained in the email.
 - b. Sign into Kahua and click the task icon and select the RFI task.
 - c. Open the project, open the RFI app and click the RFI title.
2. Scroll to the Owner section and add any applicable **Owner Remarks**.
3. The date fields in this section will auto populate.
4. Click the **Send to Primary Responder** button to workflow to the Primary Responder and save any added remarks.

Primary Responder Review and Adding Secondary Responders

This activity is typically managed by the following role: **EXT-AE**.

1. The Primary Responder can access the RFI by clicking the task link contained in the notification email, via the tasks in Kahua, or by opening the RFI app and clicking the RFI title.
2. Review the RFI. If the question is unclear, click the **Return for Clarification** button. Enter a reason for the return and click Continue.



3. If the RFI question is clear and ready for a response, click the **Edit** button.
4. If responses from additional responders are unnecessary, the Primary Responder will enter the answer to the RFI in the **Primary Response** field.
5. Click the **Respond** button to return the response to the Author. (If the project has designated an Owner's representative, the response will be returned to this person first).
6. If additional information is required from other sources do not respond to the RFI. Instead:
 - a. Scroll or use the Sections links to open the Secondary Responders section
 - b. Add any applicable comments in the **Instructions to Responders** field.
 - c. There are 4 options for the Secondary Responders:
 - i. Auto Send to Responders will automatically once the Submit button is clicked.
 - ii. Responders can add responders allows the secondary responders to add new responders to the grid.
 - iii. Responders can see all responses allows responders to see ALL secondary responses.
 - iv. Notify all responders will notify all responders when submitting to the Secondary Responders.

d. To add the additional responders, click **Insert**.

Note: If adding multiple, enter the number of responders in the field next to Insert and click Insert.

- e. For each line added, enter the name in the **Secondary Responders** field
- f. Enter a **Due Date** for each Secondary Responder.
- g. Once all names are added, click the **More Detail** button beside the name of the first person in the list. This opens a full window to add additional information.

Instructions to Responders

- Responders can add Responders
- Responders can see all Responses
- Notify All Responders

Insert 1 item(s)

<input type="checkbox"/>	<input type="checkbox"/>	Secondary Responders	Date Sent	Date Due	Date Responded	Add to Respos
<input type="checkbox"/>	<input checked="" type="checkbox"/>	* Susan Mills - GSA				<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	* Bert Aultman - GSA				<input type="checkbox"/>

- i. Add a **Due Date**.
- ii. Click the **Next** button to add information to the next Secondary Responder on the list.

- iii. Click the **Done** button located in the bottom left corner of the window to return to the RFI.
- h. Click the **Send to Secondary Responders** button. Each secondary responder will receive an email and a task will be created.

Secondary Responder Responses

This activity is typically managed by the following roles: **EXT-AE**, **EXT-CMa**, **EXT-Customer User**, **EXT-Contractors**, and **EXT-PM**.

1. The Secondary Responder can access the RFI by clicking the task notification link contained in the email, via the tasks in Kahua or opening the RFI app and clicking the RFI title.
2. Click the **Edit** button to open the document to add information.
3. Scroll to the Secondary Responders section.
4. Click the **More Detail** button beside your name to expand the section.

Instructions to Responders

- Responders can add Responders
- Responders can see all Responses
- Notify All Responders

Insert 1 item(s)

<input type="checkbox"/>	<input type="checkbox"/>	Secondary Responders	Date Sent	Date Due	Date Responded	Add to Respons
<input type="checkbox"/>	<input checked="" type="checkbox"/>	* Susan Mills - GSA				<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	* Bert Aultman - GSA				<input type="checkbox"/>

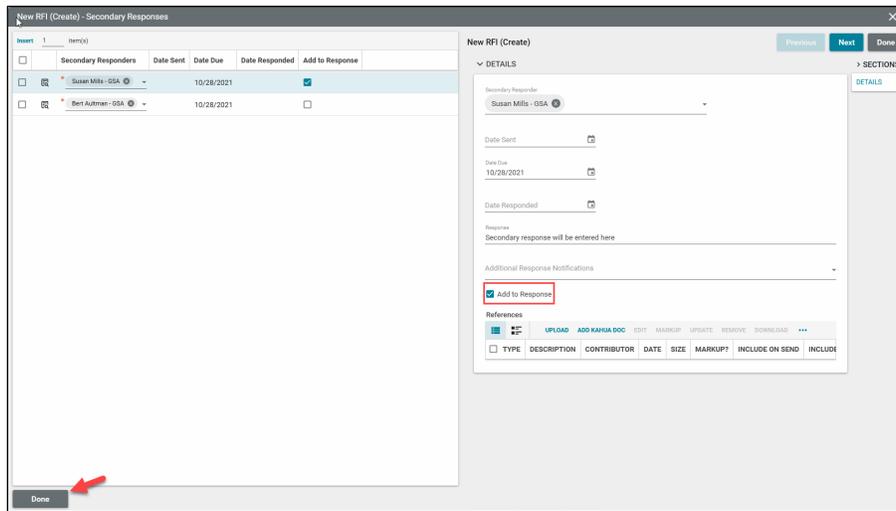
5. Enter the answer in the **Response** field.

6. Click the **Done** button in the bottom left corner to return to the RFI.
7. Click the **Submit** button to send your response to the Primary Responder.

Primary Responder Response

This task is typically managed by the following roles: **EXT-AE**, **EXT-CMa**, and **GSA PM**.

1. Open the RFI using one of the three methods outlined in the steps above.
2. In the Secondary Responder's grid, click the More Detail button to the left of the Secondary Responder's name.
3. Review the Secondary Responder's answer.
4. To add the response to the Primary Responder's answer, click the **Add to Response** checkbox.



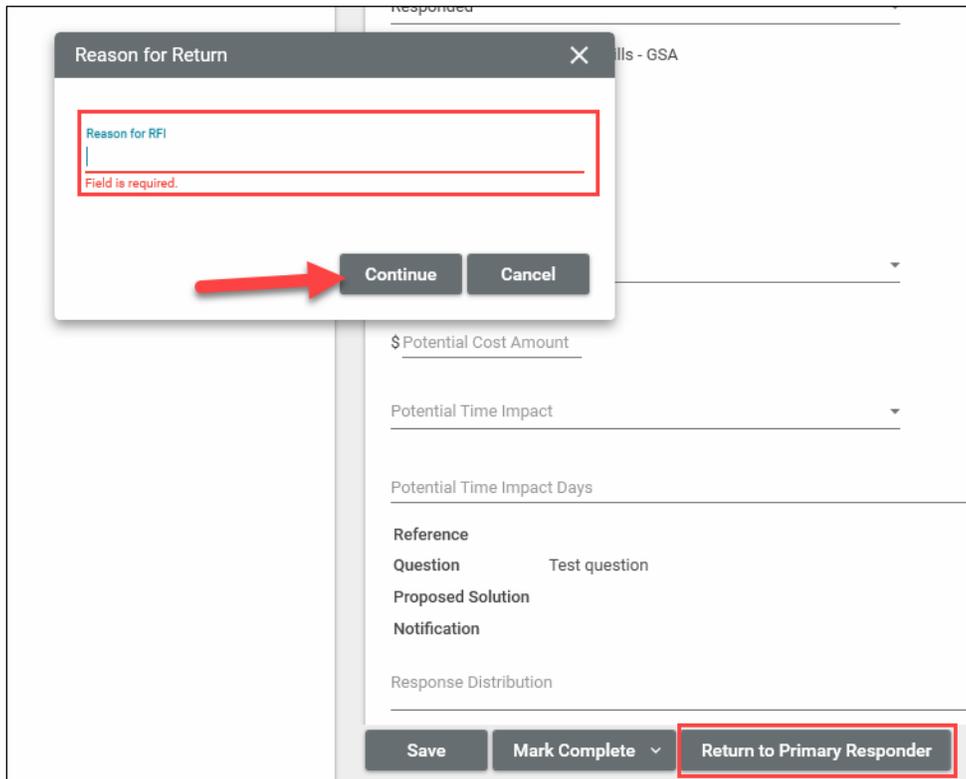
5. Click the **Done** button in the bottom left corner of the window to return to the RFI.
6. In the Primary Responder section, if the secondary responses were added in the previous step, edit the final **Primary Response** if necessary.
7. Click the **Respond** button. A task will be sent to the Author to close the RFI or request an answer clarification.

Note: The responses from the secondary responders will not show up in the RFI log.

Close the RFI or Request Clarification

This activity is typically managed by the following roles: **EXT-AE, EXT-CMa, Ext- PM, and GSA PM.**

1. The Author of the RFI will open the RFI using one of the three methods shared earlier.
2. The status of the RFI will reflect “Responded” and the assigned to column will indicate the RFI is outstanding with the Author.
3. If the RFI answer is sufficient, click one of the options listed below to close and lock the RFI.
 - a. **Mark Complete** saves and locks the RFI.
 - b. **Distribute and Mark Complete** saves and locks the RFI and sends a notification to all contacts in the Response Distribution list.
4. If the response is insufficient, click the **Return to Primary Responder** button to request a clarification.
5. Enter a **Reason for the Return**, and click the **Continue** button.



The image shows a web application interface with a modal dialog box titled "Reason for Return". The dialog box contains a text input field labeled "Reason for RFI" which is currently empty. Below the input field, the text "Field is required." is displayed in red. At the bottom of the dialog box, there are two buttons: "Continue" and "Cancel". A red arrow points to the "Continue" button. In the background, a form is visible with fields for "Potential Cost Amount", "Potential Time Impact", and "Potential Time Impact Days". Below these fields is a "Reference" section with sub-sections for "Question", "Proposed Solution", and "Notification". At the bottom of the form, there are three buttons: "Save", "Mark Complete", and "Return to Primary Responder". The "Return to Primary Responder" button is highlighted with a red rectangular box.