

# ePM Quick Reference Guide #013

## RFI Response



### WHAT IS . . .

ePM Request for Information (RFI) documents are used to capture project related questions and associated answers. An RFI contains a question, an answer, and cost and schedule impacts. Additional information, such as photos, sketches and drawings can be attached for clarification. RFI's are designed to track the information most critical to the GSA. Workflows and Activity Logs allow you to track the progress and status of each request. Using Attachments and references to other documents, the person providing a response to the RFI receives all the information they need to provide an answer. ePM tracks all RFI's to make sure nothing is missed. ePM creates numerically sequential RFI logs, which can be sorted and searched to quickly find a specific RFI.

Please refer to the following QRGs: QRG.12\_RFI Creation

### WHO USES . . .

- GSA Project Manager
- GSA Staff/Subject Matter Experts
- Construction Manager
- Architect/Engineer
- General Contractor/Design-Builder

### NEEDED DOCUMENTS . . .

- Photos
- Sketches
- Drawing/Specification Mark-ups
- Videos

### HOW TO . . .

See screenshots within this document for additional information.

#### A. LOG INTO EPM FROM INSIDE THE GSA NETWORK (INCLUDING VPN)

1. Using internet Explorer 9 or higher, go to [ePM](#).
2. Click on ePM

#### B. LOG INTO EPM FROM OUTSIDE THE GSA NETWORK

1. Using Internet Explorer 9 or higher, go to <https://epm.pbs.gsa.gov>

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2. Click on ePM.
3. Enter your GSA User ID (Example Format: firstmlast).
4. Click Submit.
5. Select the delivery method for your temporary registration code.
6. Click Submit.
7. Enter the four digit registration code provided.
8. Click Submit
9. Enter your Active Directory password.
10. Click Submit.

### C. RESPOND TO A REQUEST FOR INFORMATION (RFI)

#### ***Answer the RFI (Pending Question or Question Submitted State)***

1. Navigate to Notices > My Notices > Received to display notices
2. Click any of the 'Click any of the hyperlinks of the Notice, which will open the RFI document:  
Insert Image
3. If able to answer the question, in the 'Answer' section, type the answer, type or select an 'Answer Sent Date', and select the name of the person providing the answer (or just begin typing that name in the 'Main Contact' field).
4. Add attachments such as photos, marked up drawings, or sketches using the 'Attach' (paperclip) button at the top of the screen
5. Click the 'Submit Answer' button to execute workflow. Notice that ePM will automatically send a notice to the person who initially asked the question.  
Insert Image
6. If clarification of the question is needed, the RFI must be in the Question Submitted State. Click the workflow button and select 'Request Question Clarification'. In the workflow execution dialog box, type the question in the 'Custom Message' field.
7. Click the 'Execute' button, the initiator of the RFI will receive a notice and can respond with more information.  
Insert Image

#### ***Review the RFI (Question Submitted State)- Allows multiple parties the opportunity to provide input***

1. Navigate to Notices > My Notices > Received to display notices
2. Click any of the 'Click any of the hyperlinks of the Notice, which will open the RFI document:  
Insert Image
3. Click on the Review Process Page
4. Click the 'Add' button for each reviewer who will receive the RFI to review. Step Number indicates whether the reviews will be done in sequence or parallel. Number the steps 1, 2, 3, etc. to make the first reviewer to finish before the next reviewer is notified. Number the steps 1, 1, 1, etc to make the reviewers to do their reviews concurrently. Select each reviewer from the 'Contact' lookup list.

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5. In the fields 'Original Planned Start Date', 'Original Planned Finish Date' and 'Original Planned Review Days', enter information in each field, or simply enter an Original Planned Start Date for the first reviewer, then enter Original Planned Review Days for each reviewer, and click the 'Calculate Forward' button and ePM will automatically calculate and fill in the start and finish dates for the remaining reviews. Or enter the Original Planned Finish Date for the last reviewer, enter Original Planned Review Days for each reviewer, then click the 'Calculate Backward' button  
Insert Image
6. Execute workflow to 'Start Review'. Notices are sent to the RFI Manager and Source. Also, the first reviewer will receive a notice to begin their review.
7. Click the 'Edit' button, then click the 'Reviewer Feedback' page.
8. Select the Reviewer's name from the Reviewer drop down list  
Insert Image
9. Enter review comments and recommendation and click the 'Finish Review' button. The next Reviewer will receive a notification.  
Insert image
10. Add attachments such as photos, marked up drawings, or sketches using the 'Attach' (paperclip) button at the top of the screen
11. When the last person finishes their review, a notice is automatically sent to the RFI Manager.
12. The RFI Manager enters the final answer in the Answer box and closes the RFI. Click the 'Close' button to execute workflow. The Execute Workflow Dialog box opens, select the To: and CC: names using the spyglass and click 'Execute'.  
Insert image