OAKS
Capital Improvements

Professional Services Agreements

Agency/Higher-Ed

OFCC
OHIO FACILITIES CONSTRUCTION COMMISSION

DocuSign Enabled Record

- The Professional Services Agreements record now utilizes DocuSign, which enables electronic signature of Agreements.
- Users who are sent an Agreement for signature via DocuSign do not need a separate account to sign the document.
- For more information about how to use DocuSign, please refer to the DocuSign Job Aid available on the OFCC Website

Purpose

- The Professional Services Agreements record establishes the Schedule of Values (SOV) for Professional Services Pay Requests.

- **Workflow**

  Created by: Associate → Submitted to: PM Technical Proposal Review → Sent to: Associate Update (if necessary) → Sent to: PC Contract Prep → Sent to: PM Supervisor Review → Sent to: PC for DocuSign

Roles & Responsibilities

- Professional Services Provider
  - Initiates the agreement record
  - Provides clarification and updates upon request
  - Reviews and signs the contract
  - Acknowledges the Notice to Commence Services

- Project Coordinator
  - May create the agreement record from the provider's technical proposal
  - Prepares the Associate Recommendation letter and controlling board criteria for funding
  - Prepares and distributes the contract document via DocuSign
  - Prepares and distributes the Notice to Commence Services letter

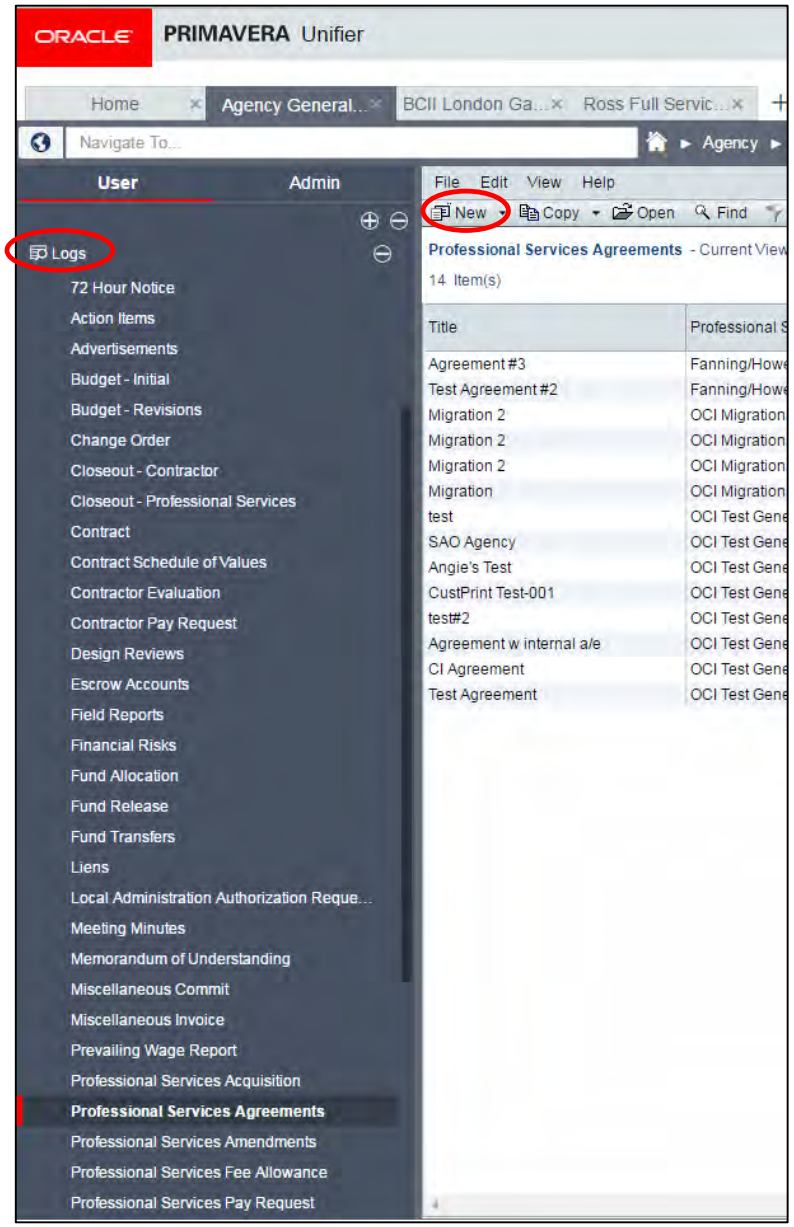
- Project Manager
  - Reviews the technical proposal and negotiates needed changes and clarifications
  - Recommends preparation of the agreement

Roles & Responsibilities

- Owner
  - Obtains a purchase order for the agreement and records the purchase order information
  - Approves the agreement and signs the agreement document via DocuSign
- Project Manager Supervisor
  - Reviews and recommends approval of the agreement
- Contracting Authority
  - Signs the agreement contract for the project
  - Ensures certification of funding
- Attorney General
  - Signs the agreement contract for the State of Ohio
  - Reviews and approves the electronic record

Create a Professional Services Agreement

- In Oaks CI navigate to:
  - Logs -> Professional Services Amendment
  - Click New
  - Select Workflow (if applicable)



Form Completion

- Fill out the General block (All Items with a red * are required)
- To enter the Professional Services Provider, click Select and choose the appropriate contract
- Scroll down to the Requirements section

Create New Professional Services Agreements - Project No. OCI-080001 - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/process/new?wftemplate_id=45720&module_name=upsa1&csvimport=false8

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Add Attachment Discussion Cash Flow Close Window

General Professional Services Agreements

General

Organization: Department of Administrative Service
Project Number: OCI-080001
Project Name: Agency General Projects Test
Project Location: OAKS CI Administration
Title: Test Agreement #2 *
Record Number:
Creator: Katie Tuttle
Creation Date:
Status:
Fee Title: SAO Standard Fee 1
EDGE Waiver: No
EDGE Goal Percent: 5

Vendor Information

Professional Services Provider: Fanning/Howey Associations Select...
Vendor Legal Name:
PS Acquisition: Select...
EDGE Certified Sub?: -Select-
Joint Venture: -Select-

Agreement Conditions

Change Order Fee Percentage: 0
Change Order Fee Allowance ($): $0.00
Agreement Type: Design *
Other Description:

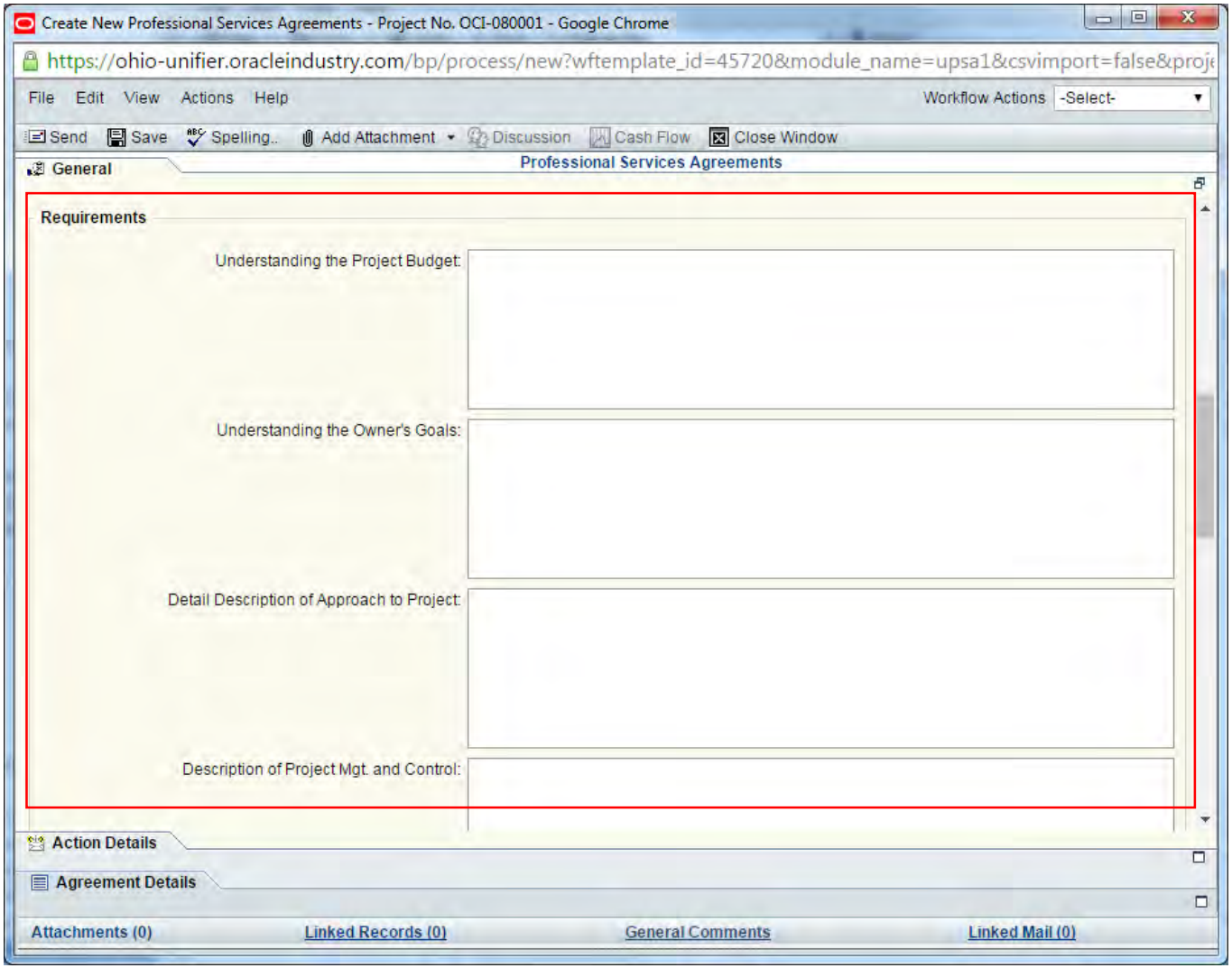
Action Details

Agreement Details

Attachments (0) Linked Records (0) General Comments Linked Mail (0)

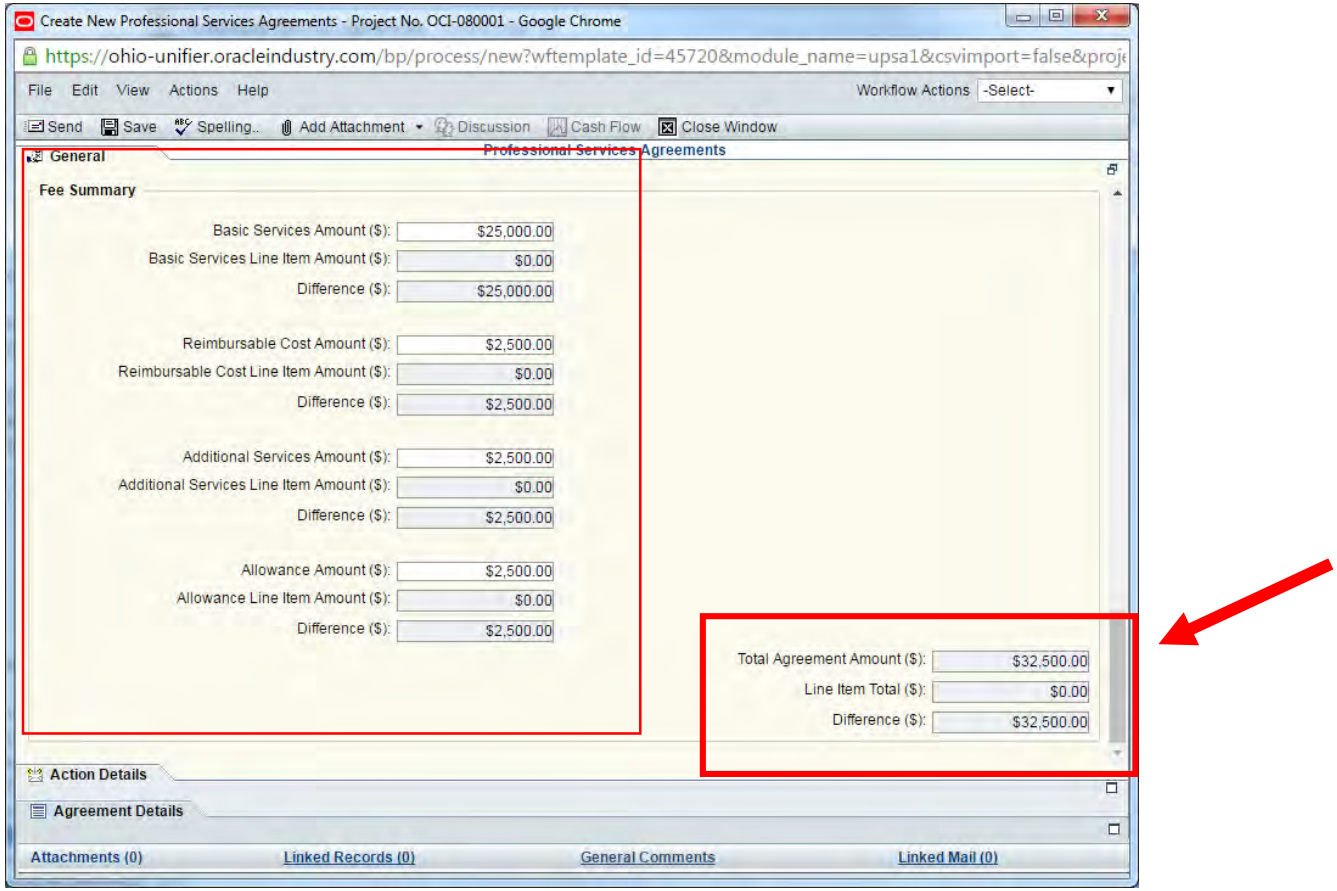
Form Completion

- Fill out all information in the Requirements section
- Scroll down to the Fee Summary section



Form Completion

- For each category in the Fee Summary block, enter the negotiated amounts
- The difference at the bottom reflects the total agreement amount.
- You must now add line items to make the difference $0.00
  - Note: Each amount must be added as a separate line item (Basic services, additional services, etc.)



Add Line Items

- To add Line Items click the Agreement Details tab

Create New Professional Services Agreements - Project No. OCI-080001 - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/process/new?wftemplate_id=45720&module_name=upsa1&csvimport=false&proje

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Add Attachment Discussion Cash Flow Close Window

General Professional Services Agreements

Fee Summary

Basic Services Amount ($):	$25,000.00
Basic Services Line Item Amount ($):	$0.00
Difference ($):	$25,000.00
Reimbursable Cost Amount ($):	$2,500.00
Reimbursable Cost Line Item Amount ($):	$0.00
Difference ($):	$2,500.00
Additional Services Amount ($):	$2,500.00
Additional Services Line Item Amount ($):	$0.00
Difference ($):	$2,500.00
Allowance Amount ($):	$2,500.00
Allowance Line Item Amount ($):	$0.00
Difference ($):	$2,500.00
Total Agreement Amount ($):	$32,500.00
Line Item Total ($):	$0.00
Difference ($):	$32,500.00

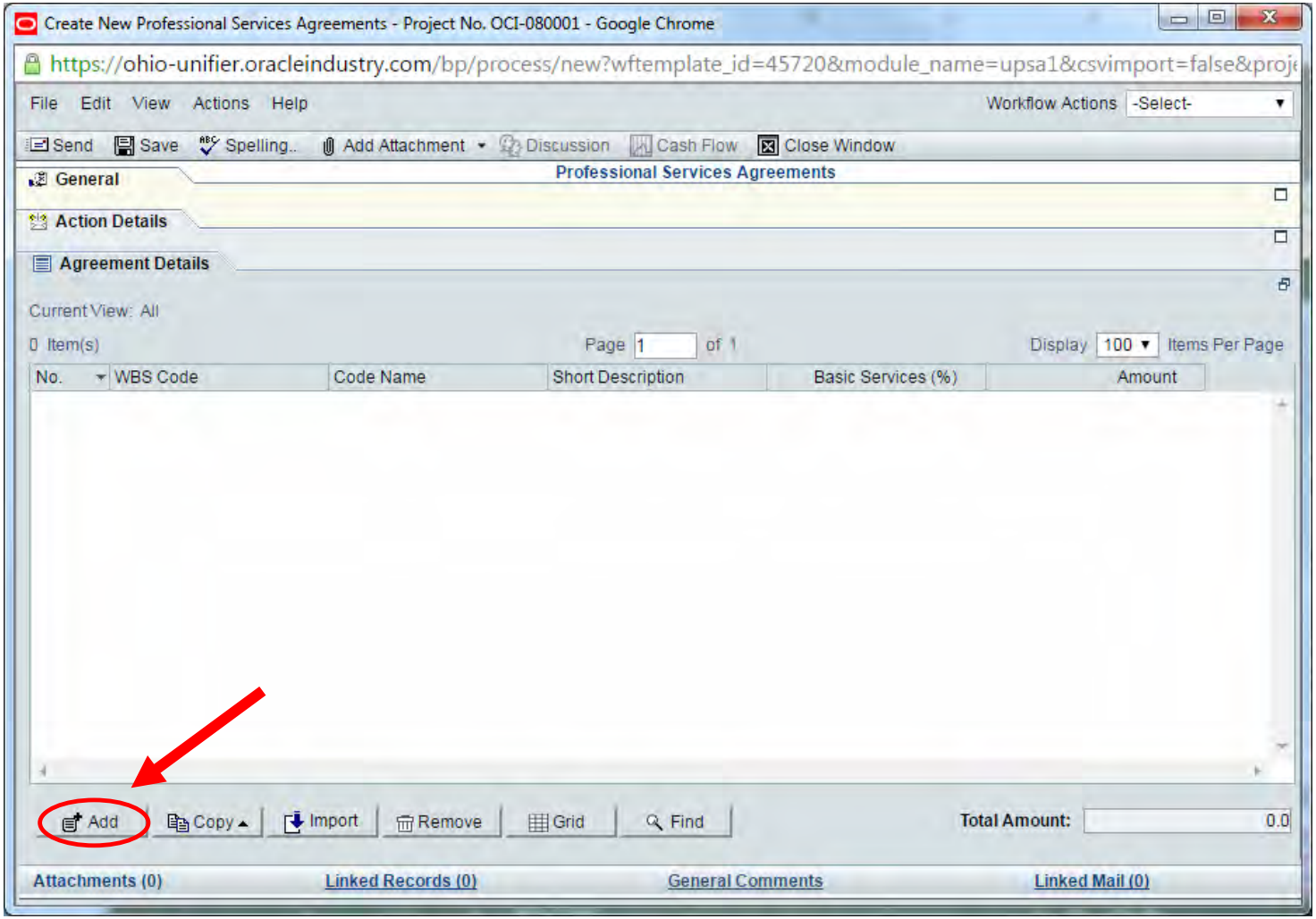
Action Details

Agreement Details

Attachments (0) Linked Records (0) General Comments Linked Mail (0)

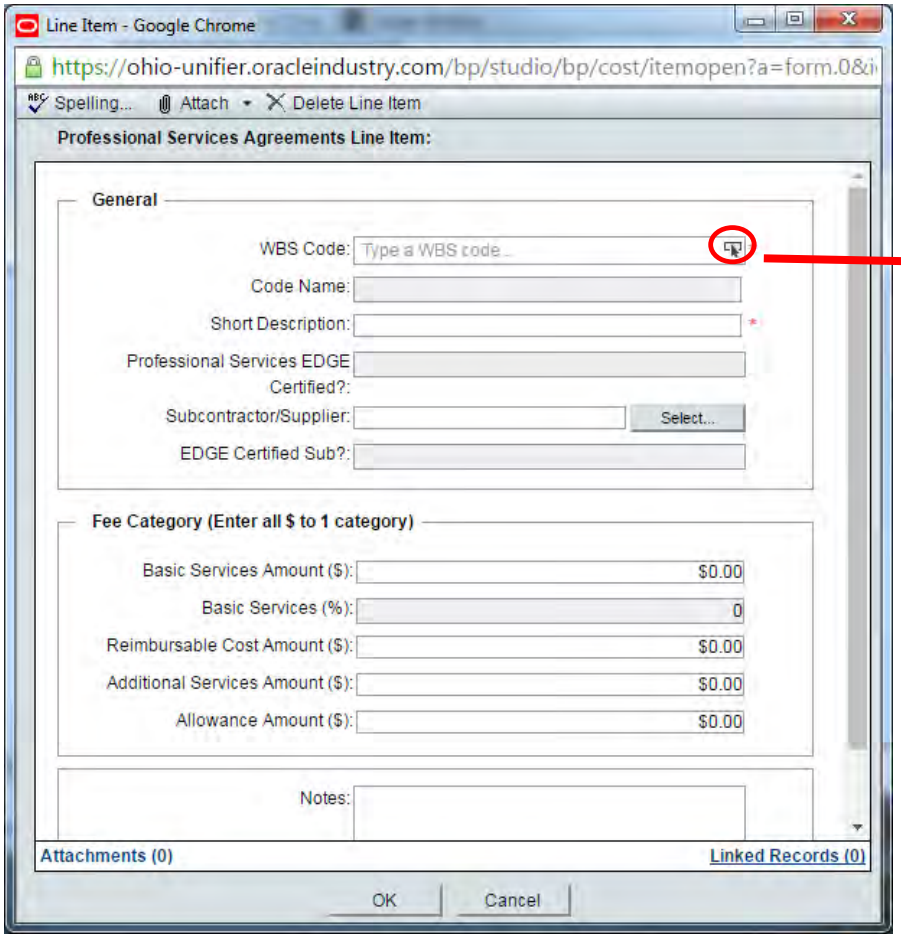
Add Line Items

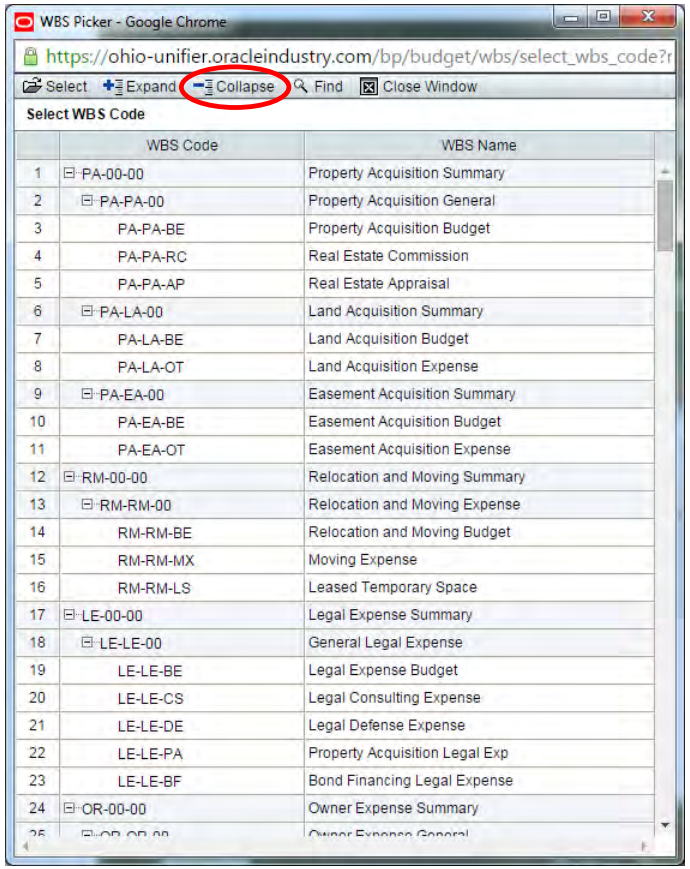
- Click Add



WBS Codes

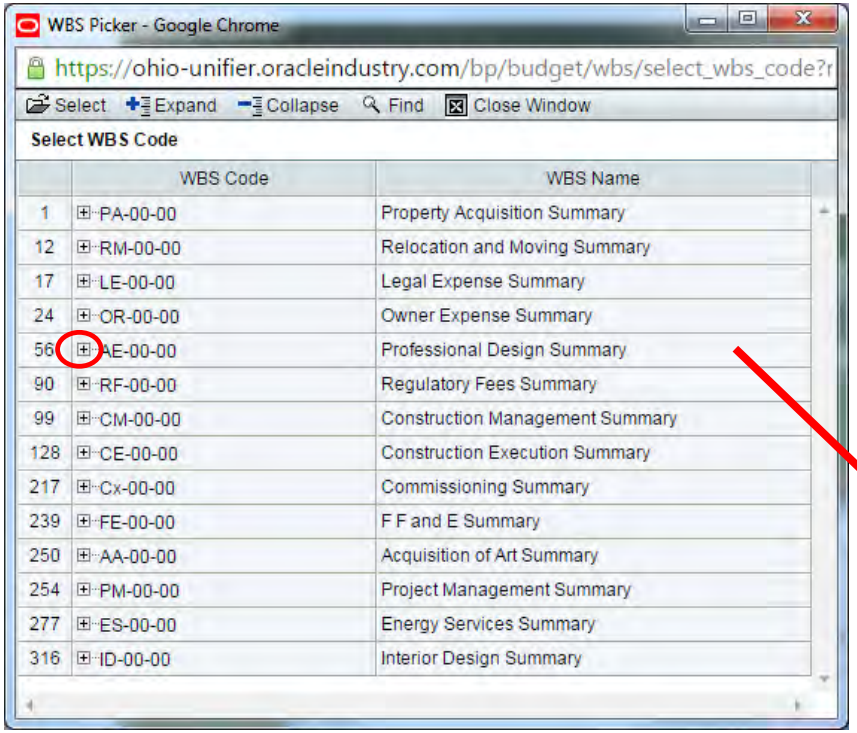
- To Add a New Line, click the arrow next to WBS Code
- Click Collapse



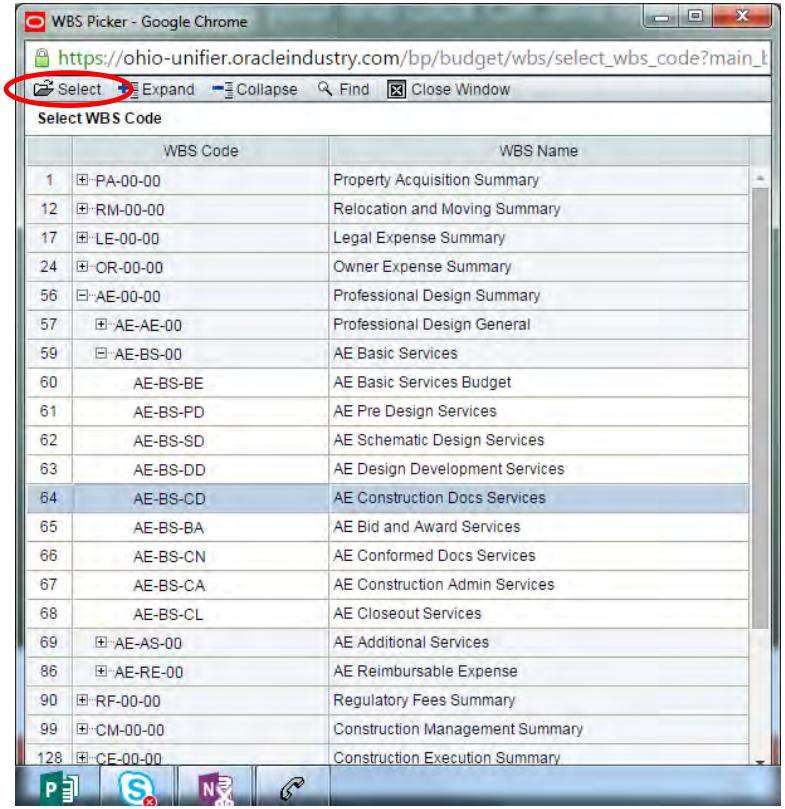


WBS Codes

- Click the plus (+) next to the AE Line
- Choose the appropriate category and click Select



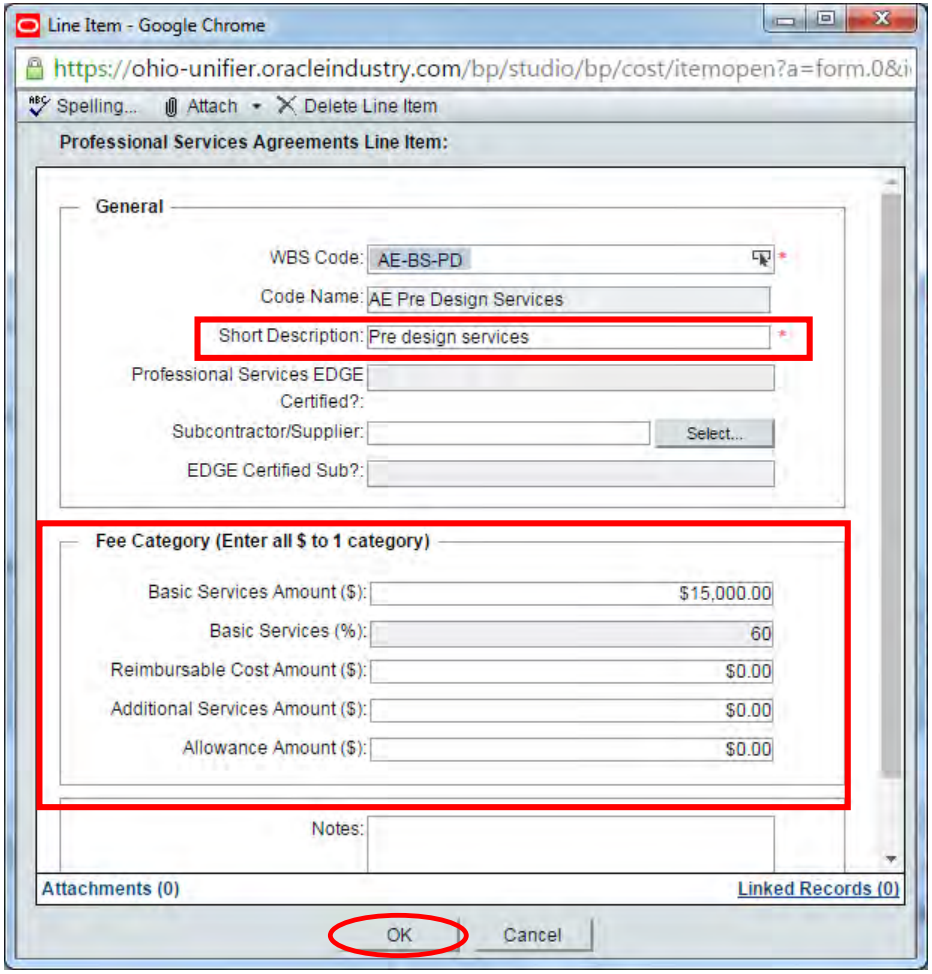
	WBS Code	WBS Name
1	PA-00-00	Property Acquisition Summary
12	RM-00-00	Relocation and Moving Summary
17	LE-00-00	Legal Expense Summary
24	OR-00-00	Owner Expense Summary
56	AE-00-00	Professional Design Summary
90	RF-00-00	Regulatory Fees Summary
99	CM-00-00	Construction Management Summary
128	CE-00-00	Construction Execution Summary
217	Cx-00-00	Commissioning Summary
239	FE-00-00	F F and E Summary
250	AA-00-00	Acquisition of Art Summary
254	PM-00-00	Project Management Summary
277	ES-00-00	Energy Services Summary
316	ID-00-00	Interior Design Summary



	WBS Code	WBS Name
1	PA-00-00	Property Acquisition Summary
12	RM-00-00	Relocation and Moving Summary
17	LE-00-00	Legal Expense Summary
24	OR-00-00	Owner Expense Summary
56	AE-00-00	Professional Design Summary
57	AE-AE-00	Professional Design General
59	AE-BS-00	AE Basic Services
60	AE-BS-BE	AE Basic Services Budget
61	AE-BS-PD	AE Pre Design Services
62	AE-BS-SD	AE Schematic Design Services
63	AE-BS-DD	AE Design Development Services
64	AE-BS-CD	AE Construction Docs Services
65	AE-BS-BA	AE Bid and Award Services
66	AE-BS-CN	AE Conformed Docs Services
67	AE-BS-CA	AE Construction Admin Services
68	AE-BS-CL	AE Closeout Services
69	AE-AS-00	AE Additional Services
86	AE-RE-00	AE Reimbursable Expense
90	RF-00-00	Regulatory Fees Summary
99	CM-00-00	Construction Management Summary
128	CE-00-00	Construction Execution Summary

Add Line Items

- Enter a Short Description
- Enter Fee Category Information (only use one fee category per line item)
- Click OK



Add Line Items

- Line Item will populate in Agreement Details

Professional Services Agreements - Agreement #3 - Project No. OCI-080001 - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/process/task/open?task_id=1052099&parent_id=0&viewOnly=0&project_id=

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Add Attachment Discussion Cash Flow Close Window

General Professional Services Agreements

Action Details

Agreement Details

Current View: All Show Currency in: Transaction Currency

1 Item(s) Page 1 of 1 Display 100 Items Per Page

No.	WBS Code	Code Name	Short Description	Basic Services (%)	Amount
001	AE-BS-PD	AE Pre Design Services	Pre design services	60	$15,000.00

Add Copy Import Remove Grid Find Total Amount: $15,000.00

Attachments (0) Linked Records (0) General Comments Linked Mail (0)

Change Order Fee Allowance

- To enter the Change Order Fee Allowance, use the WBS code under the Owner Expense Summary for AE Change Order Allowance (OR-CF-AE)
- Typically, money for this allowance remains in the Owner's budget and is transferred with the Associate processes a change order for the project and submits the associated Change Order Fee Allowance Process

WBS Picker - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/budget/wbs/select_wbs_c

Select | Expand | Collapse | Find | Close Window

Select WBS Code

	WBS Code	WBS Name
1	PA-00-00	Property Acquisition Summary
12	RM-00-00	Relocation and Moving Summary
17	LE-00-00	Legal Expense Summary
24	OR-00-00	Owner Expense Summary
56	AE-00-00	Professional Design Summary
90	RF-00-00	Regulatory Fees Summary
99	CM-00-00	Construction Management Summary
128	CE-00-00	Construction Execution Summary
217	Cx-00-00	Commissioning Summary
239	FE-00-00	F F and E Summary
250	AA-00-00	Acquisition of Art Summary
254	PM-00-00	Project Management Summary
277	ES-00-00	Energy Services Summary
316	ID-00-00	Interior Design Summary

WBS Picker - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/budget/wbs/select_wbs_code?main_budget_i

Select | Expand | Collapse | Find | Close Window

Select WBS Code

	WBS Code	WBS Name
1	PA-00-00	Property Acquisition Summary
12	RM-00-00	Relocation and Moving Summary
17	LE-00-00	Legal Expense Summary
24	OR-00-00	Owner Expense Summary
25	OR-OR-00	Owner Expense General
27	OR-PL-00	OR Planning Expense Summary
34	OR-OT-00	OR Other Expense General
47	OR-CF-00	Owner Contingency Fund
51	OR-CF-BC	Design Contingency Fund
52	OR-CF-DC	Bid Reserve Contingency Fund
53	OR-CF-CC	Construction Contingency Fund
54	OR-CF-AE	AE Change Order Allowance
55	OR-CF-PM	PM Change Order Allowance
56	AE-00-00	Professional Design Summary
90	RF-00-00	Regulatory Fees Summary
99	CM-00-00	Construction Management Summary
128	CE-00-00	Construction Execution Summary
217	Cx-00-00	Commissioning Summary
239	FE-00-00	F F and E Summary
250	AA-00-00	Acquisition of Art Summary
254	PM-00-00	Project Management Summary

Add Line Items

- Continue adding items as necessary
- The Total Amount should match the Amount from the General block and the Difference should be $0.00

Professional Services Agreements - Agreement #3 - Project No. OCI-080001 - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/process/task/opendraft?task_id=1052099&id=124021&sourceId=2085&project_id=1003&

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Add Attachment Discussion Cash Flow Close Window

General — Professional Services Agreements

Allowance Amount ($):	$2,500.00
Allowance Line Item Amount ($):	$0.00
Difference ($):	$2,500.00
Total Agreement Amount ($):	$32,500.00
Line Item Total ($):	$32,500.00
Difference ($):	$0.00

Action Details

(Click here to view latest content

To... Cc... Send For: Task Notes:

Agreement Details

Current View: All Show Currency in: Transaction Currency

5 Item(s) Page 1 of 1 Display 100 Items Per Page

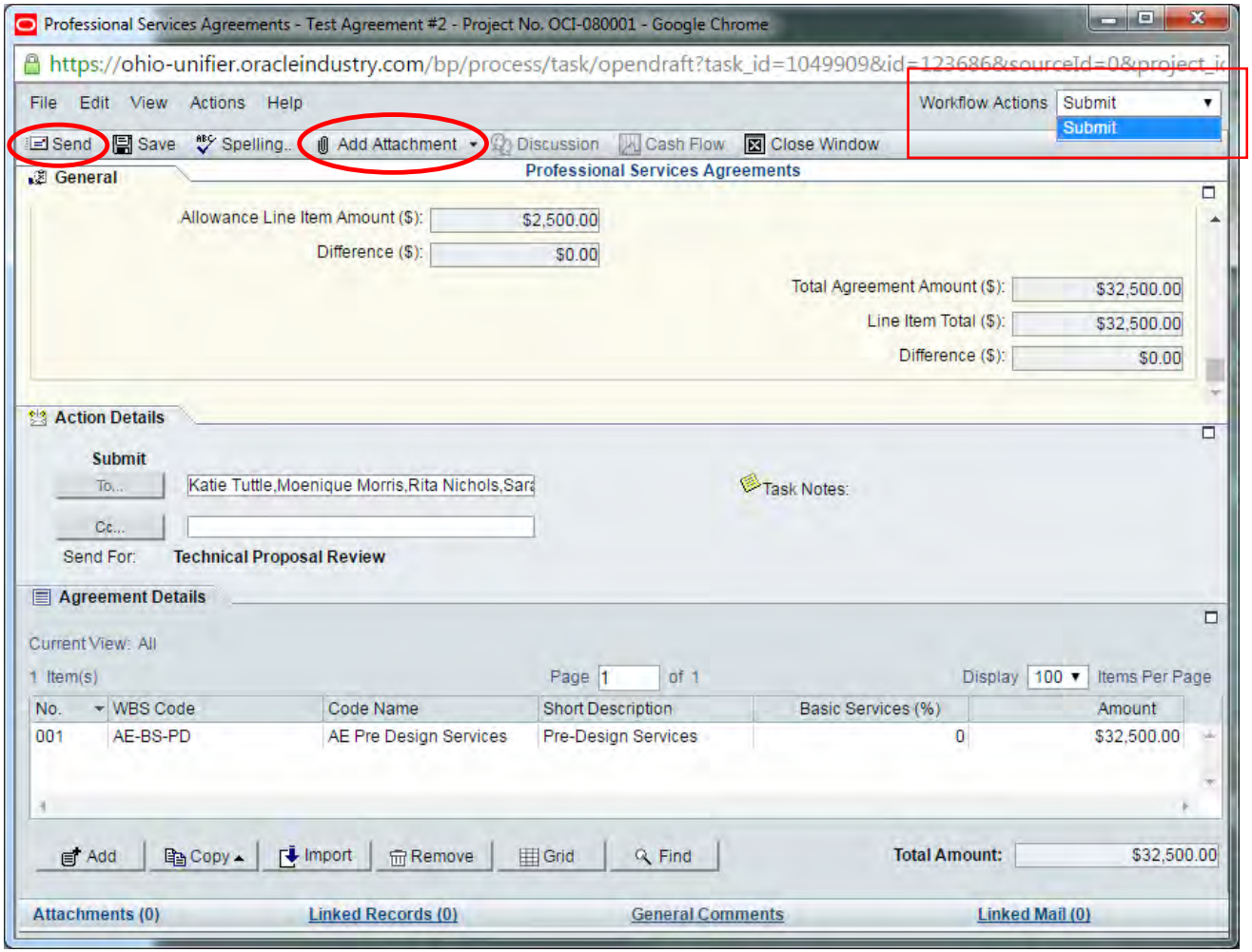
No.	WBS Code	Code Name	Short Description	Basic Services (%)	Amount
005	AE-AS-SU	AE Site Surveying Services	Site Survey	10	$2,500.00
004	AE-AS-BC	AE Basic Commissioning	Basic Commissioning	10	$2,500.00
003	AE-RE-DP	AE Document Printing	Document Printing	10	$2,500.00
002	AE-BS-DD	AE Design Development Se	Design Development	40	$10,000.00
001	AE-BS-PD	AE Pre Design Services	Pre design services	60	$15,000.00

Add Copy Import Remove Grid Find Total Amount: $32,500.00

Attachments (0) Linked Records (0) General Comments Linked Mail (0)

Submit Agreement

- Add any necessary documentation by clicking “Add Attachment”
  - Reminder: Documents must first be uploaded into Document Manager
- Choose a Workflow Action
- Click Send



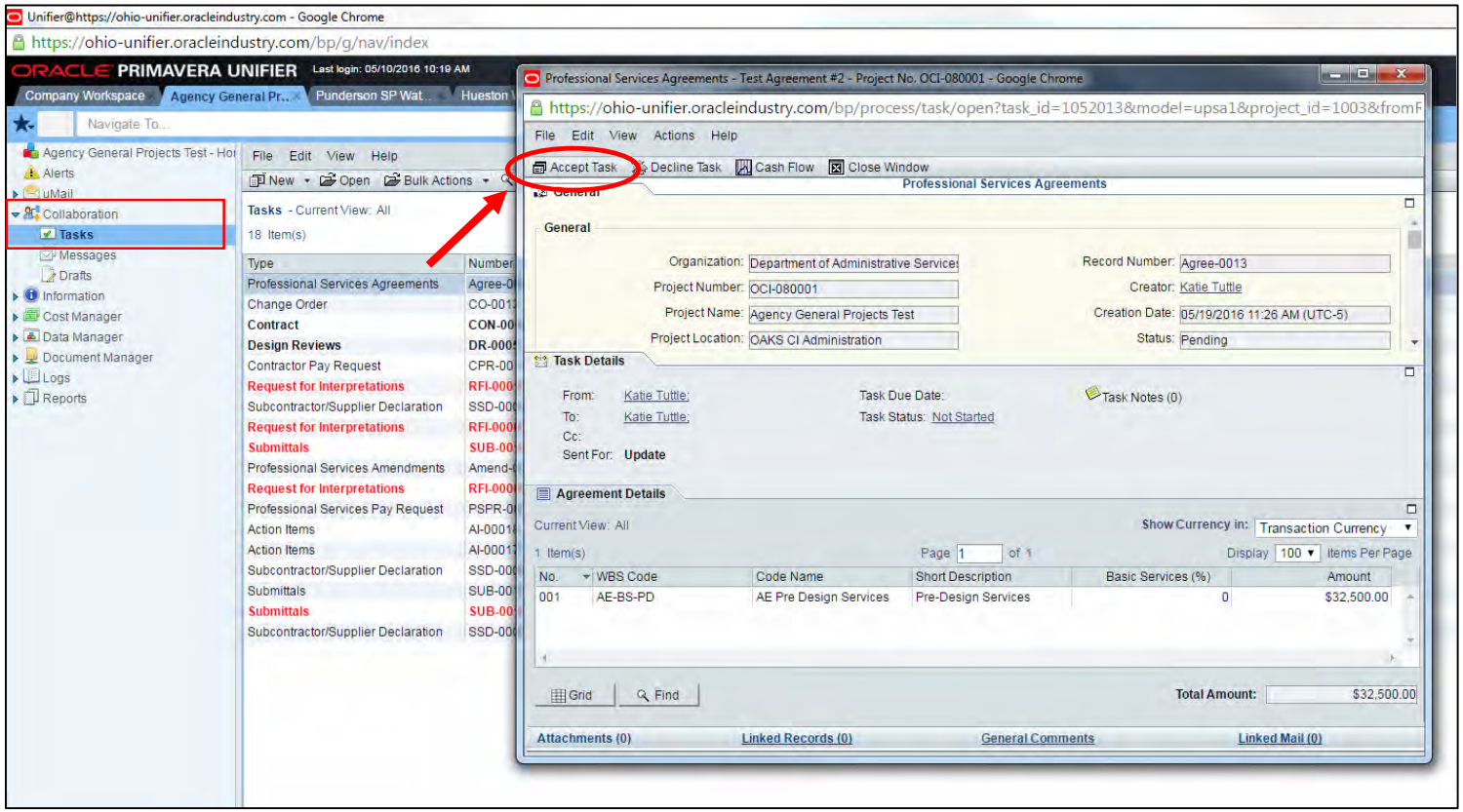
Technical Proposal Review– PM

- The technical proposal contains information important to the negotiation and contract execution process including:
  - A statement of the recommended firm's understanding of the project
  - A proposed management approach
  - Proposed design and project schedules
  - A proposal of basic and additional service fees
  - A proposed project budget summary and other relevant information

- The Project Manager will:
  - Review the submission
  - If necessary, return the record to the Professional Services Provider for clarification or updates to the proposal **OR** Accept the proposal as submitted and forward it to the Project Coordinator to prepare the Contract

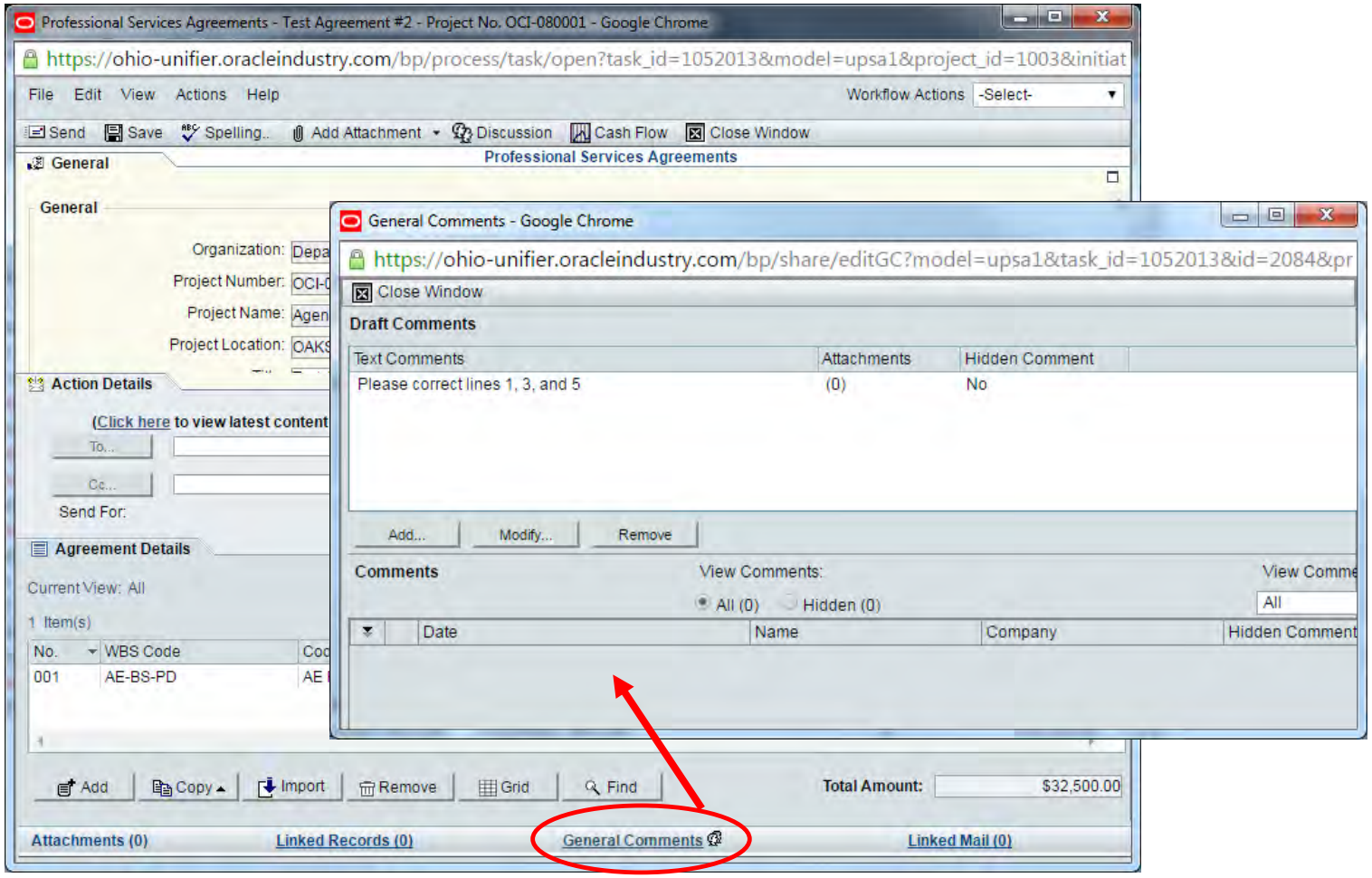
Update Step

- If the record needs an update, the Professional Services Provider will :
  - Provide clarifications or modifications to the record submission
  - Send it back to the Project Manager for another review
- Navigate to: Collaboration -> Tasks
- Double click Task to open
- Click Accept Task to begin working on the record



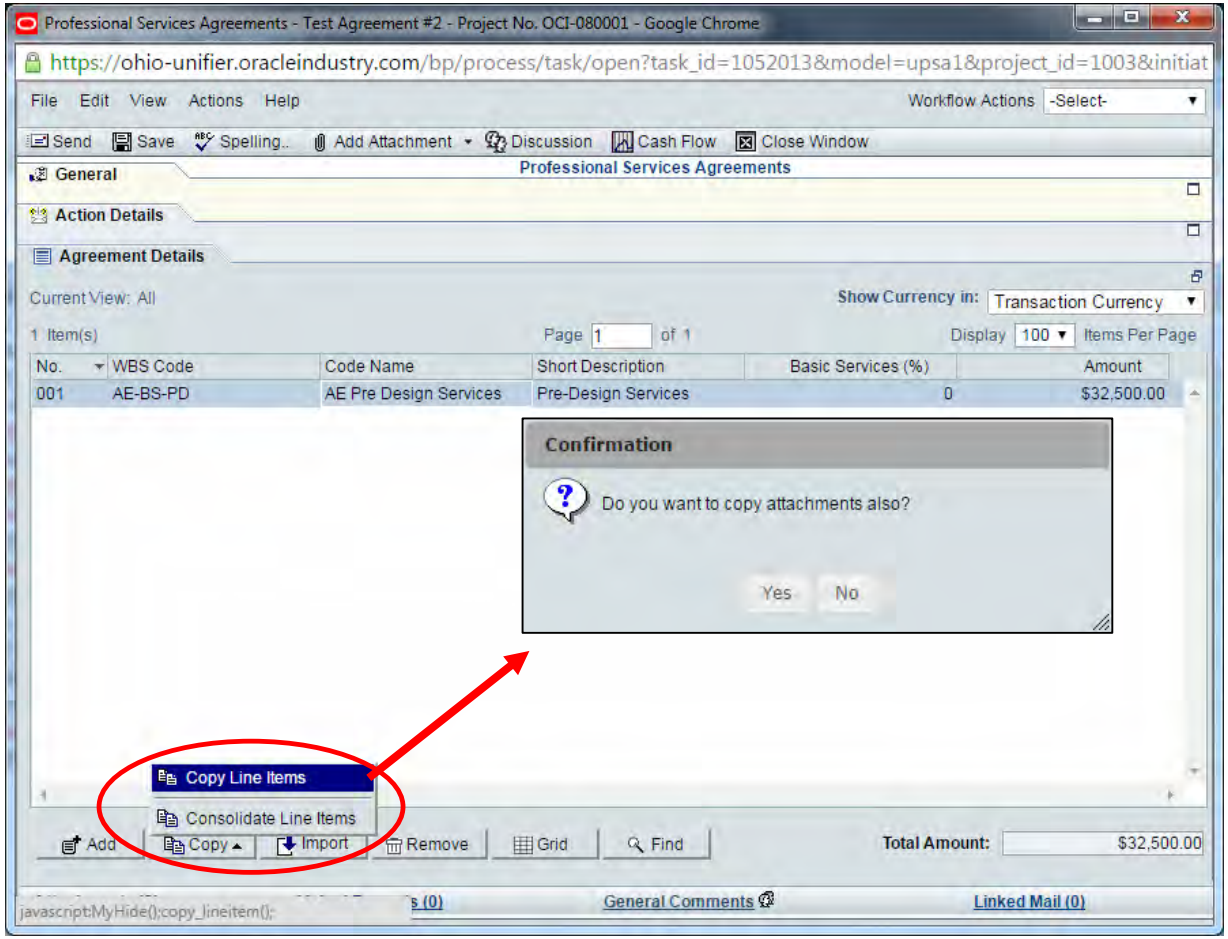
Update Step

- Review General Comments to see notes from the Project Manager



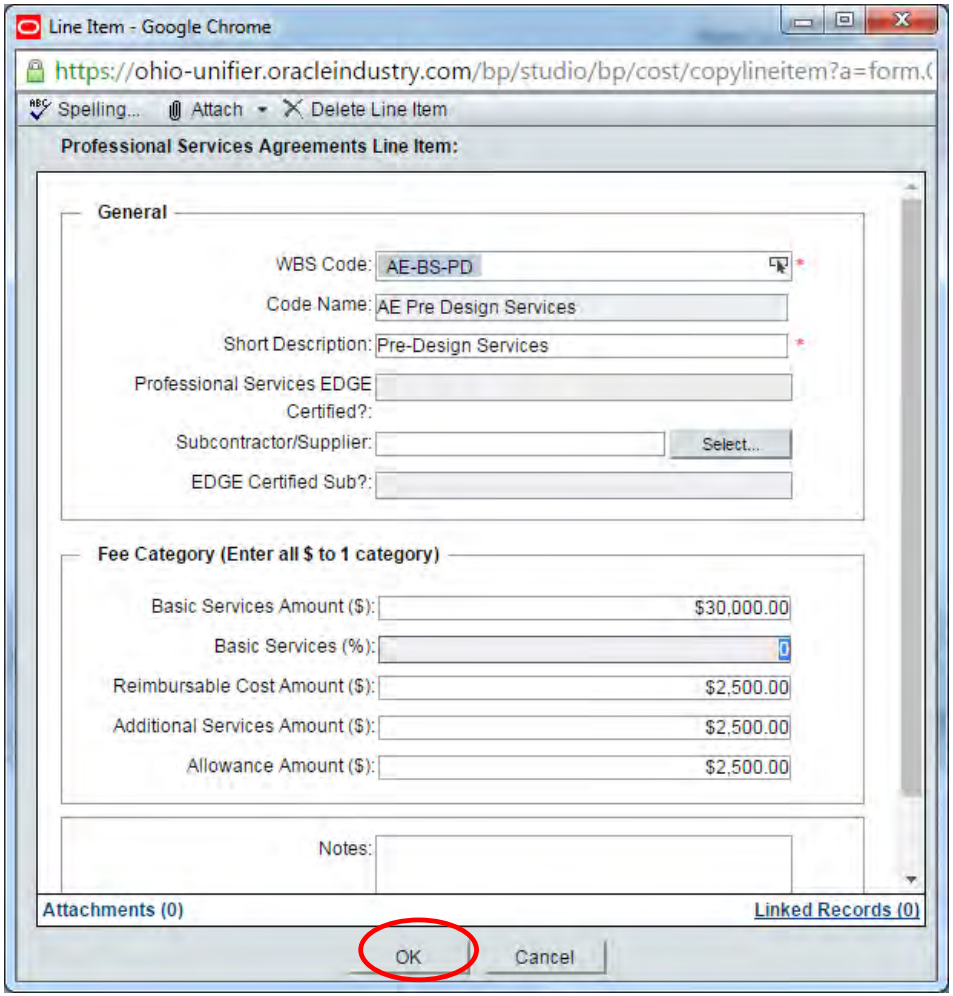
Correct Line Items

- Note: Individual line items cannot be edited
- To make corrections to line items:
  - Highlight the line you need to correct
  - Click Copy, Copy Line Items
  - Choose whether to also copy attachments



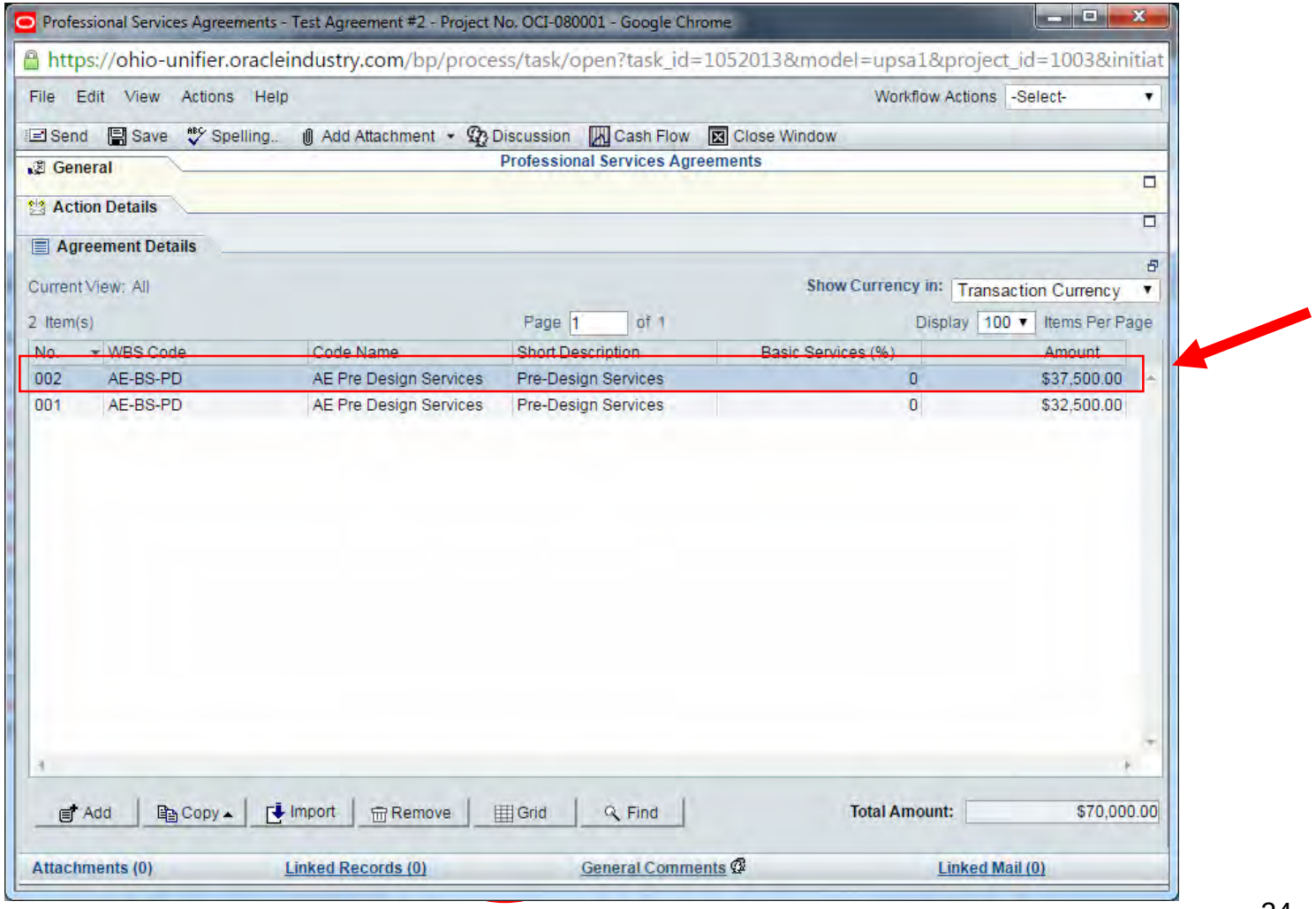
Correct Line Items

- Correct the necessary information in the line item screen and click OK



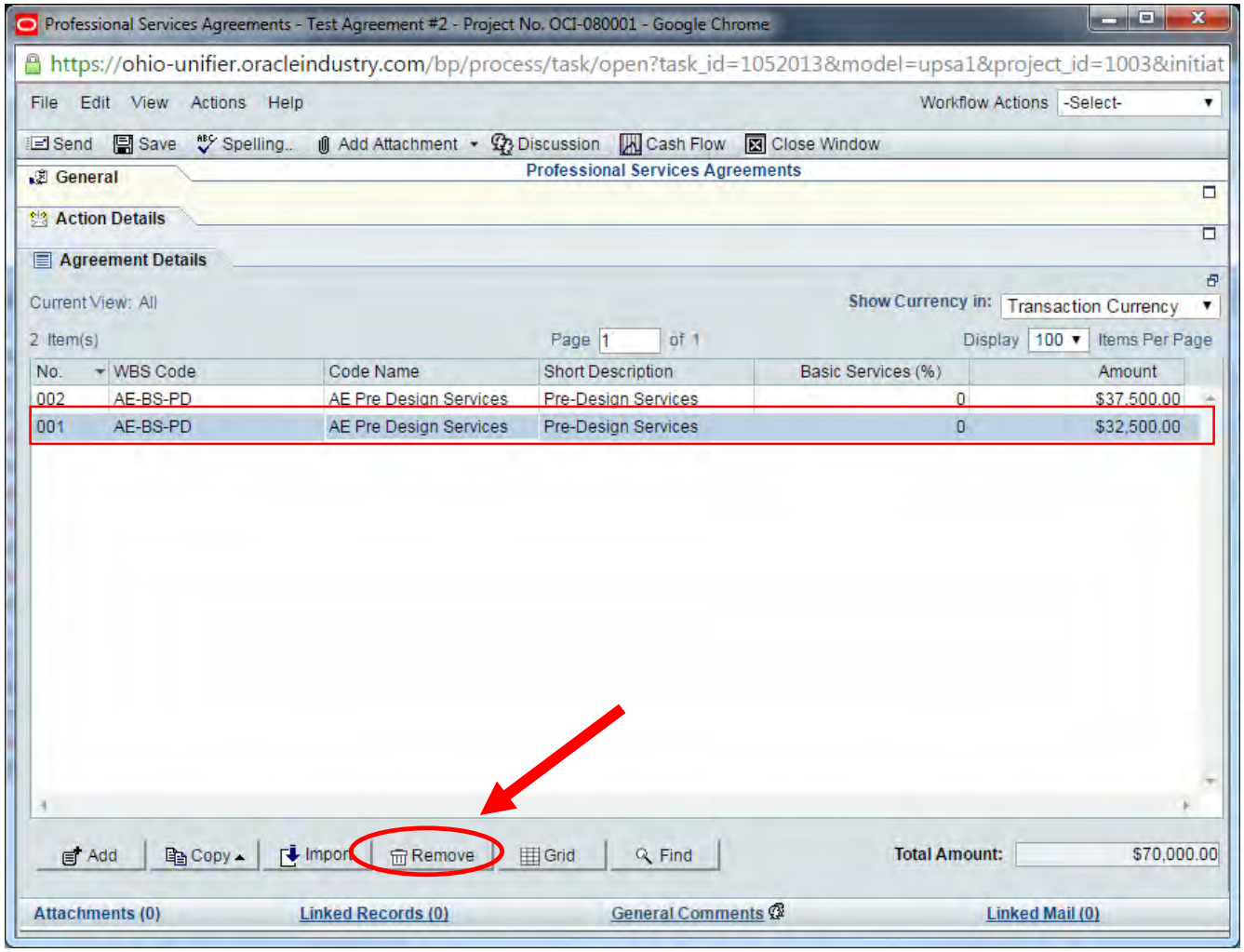
Correct Line Items

- The corrected line item will be added
- You must now remove the incorrect line item



Remove Incorrect Line

- Highlight the incorrect line
- Click Remove



Resubmit the Agreement

- You should only see the corrected line in Agreement Details
- Select the Workflow Action: Resubmit
- Click Send

Professional Services Agreements - Test Agreement #2 - Project No. OCI-080001 - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/process/task/open?task_id=1052013&parent_id=0&viewOnly=0&project_id=

File Edit View Actions Help

Workflow Actions: Resubmit

Send | Save | Spelling.. | Add Attachment | Discussion | Cash Flow | Close Window

General — Professional Services Agreements

General

Organization:	Department of Administrative Service	Record Number:	Agree-0013
Project Number:	OCI-080001	Creator:	Katie Tuttle
Project Name:	Agency General Projects Test	Creation Date:	05/19/2016 11:26 AM (UTC-5)
Project Location:	OAKS CI Administration	Status:	Pending
Title:	Test Agreement #2 *	Fee Title:	SAO Standard Fee 1

Action Details

Resubmit (Click here to view latest content

To... Katie Tuttle

Cc...

Task Notes:

Send For: Technical Proposal Review

Agreement Details

Current View: All — Show Currency in: Transaction Currency

1 Item(s) — Page 1 of 1 — Display 100 Items Per Page

No.	WBS Code	Code Name	Short Description	Basic Services (%)	Amount
002	AE-BS-PD	AE Pre Design Services	Pre-Design Services	0	$37,500.00

Add | Copy | Import | Remove | Grid | Find

Total Amount: $37,500.00

Attachments (0) | Linked Records (0) | General Comments | Linked Mail (0)

Contract Preparation– PC

- The Project Coordinator will:
  - Prepare the Agreement documents once the terms and conditions of the Technical Proposal are agreed upon by the Project Manager and Professional Services Provider
  - Review and verify receipt of Agreement and AG Checklist information required in the contract execution process
  - Create the Agreement Document via DocuSign and distribute to all necessary parties

Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211