



Professional Services Agreements

Consultant List Project

Purpose

- ▶ The Professional Services Agreements record establishes the Schedule of Values (SOV) for Professional Services Pay Requests in the Consultant List Project.

- ▶ **Workflow**

Created by: **Consultant Contract Manager** → Submitted to: **PM Technical Proposal Review** → Sent to: **Consultant Contract Manager Update (if necessary)** → Sent to: **PM Supervisor Review** → Sent to: **Consultant Contract Manager for DocuSign Initiation** → Sent to: **Vendor signature via DocuSign** → Sent to: **OFCC Accounts Receivable for Request Reimbursement PO (if necessary) OR End**

Create a Professional Services Agreement

▶ In Oaks CI navigate to:

▶ Logs -> Professional Services Amendment

▶ Click New

▶ Select Workflow (if applicable)

The screenshot shows the Oracle Primavera Unifier interface. The top navigation bar includes the Oracle logo, 'PRIMAVERA Unifier', and a user profile 'Proxy for Katie Tuttle'. Below the navigation bar is a search bar and a breadcrumb trail 'Agency > Ohio Fac'. The main content area displays a table titled 'Professional Services Agreements' with columns for 'Title' and 'Professional Services Provider'. The table lists various agreements such as 'Lend Lease - OSDM Update 2015' and 'SFC-130888 SPGB Circleville Facility'. The left sidebar contains a navigation menu with options like 'OFCC Specialty Consultants', 'Alerts', 'uMail', 'Collaboration', 'Information', 'Cost Manager', 'Data Manager', 'Document Manager', 'Logs', 'DPE PS Pay Request', 'Fund Allocation', 'Fund Release', 'Fund Transfers', 'Professional Services Agr...', 'Professional Services Amen...', 'Professional Services Pay R...', 'Purchase Orders', 'Vouchers', 'Work Assignments', and 'Reports'. The 'New' button in the top menu and the 'Logs' option in the sidebar are both circled in red. A red arrow points from the 'Logs' option to the 'Professional Services Agr...' option in the sidebar.

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

Professional Services Agreements

General

Organization: Record Number:

Project Number: SFC-130888 Creator: Katie Tuttle

Project Name: OFCC Specialty Consultant List Creation Date:

Project Location: OFCC Status:

Title: Test Consultant Agreement * Fee Title:

Selection Method: Consultant List FY16/17 * Reimbursement Required?: No *
Delivery Method: -Select- EDGE Waiver: -Select- *
Total Project Cost \$: \$0.00 EDGE Goal Percent: 0
Publication Date:

Vendor Information

Professional Services Provider: Amazing Architectural Inc. Select... *
Vendor Legal Name:

PS Acquisition: Select...
EDGE Certified Sub?: -Select- *
Joint Venture: -Select- *

Agreement Conditions

Change Order Fee: 0 Agreement Type: Design *

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

The screenshot shows a web browser window titled "Create New Professional Services Agreements - Project No. SFC-130888 - Google Chrome". The address bar shows the URL: https://ohio-dev-unifier.oracleindustry.com/bp/process/new?wftemplate_id=3093&module_name=upsa1&csvimport=false. The browser menu includes File, Edit, View, Actions, and Help. A toolbar contains icons for Send, Save, Spelling, Add Attachment, Discussion, Cash Flow, and Close Window. The page title is "Professional Services Agreements".

The main content area is divided into sections. The "Requirements" section is highlighted with a red border and contains four text input fields:

- Understanding the Project Budget:
- Understanding the Owner's Goals:
- Detail Description of Approach to Project:
- Description of Project Mgt. and Control:

Below the Requirements section are sections for "Action Details" and "Agreement Details". At the bottom of the page, there are links for "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

Form Completion

- ▶ For each category in the Fee Summary block, enter the negotiated amounts
- ▶ The difference at the bottom reflects the total agreement amount.

The screenshot shows a web browser window with the URL https://ohio-dev-unifier.oracleindustry.com/bp/process/new?wftemplate_id=3093&module_name=upsa1&csvimport=false. The page title is "Create New Professional Services Agreements - Project No. SFC-130888 - Google Chrome". The form is titled "Professional Services Agreements" and is in the "General" tab. The form contains several sections of input fields:

- Basic Services:** Basic Services Amount (\$) is \$25,000.00; Basic Services Line Item Amount (\$) is \$0.00; Difference (\$) is \$25,000.00.
- Reimbursable Cost:** Reimbursable Cost Amount (\$) is \$2,500.00; Reimbursable Cost Line Item Amount (\$) is \$0.00; Difference (\$) is \$2,500.00.
- Additional Services:** Additional Services Amount (\$) is \$2,500.00; Additional Services Line Item Amount (\$) is \$0.00; Difference (\$) is \$2,500.00.
- Allowance:** Allowance Amount (\$) is \$2,500.00; Allowance Line Item Amount (\$) is \$0.00; Difference (\$) is \$2,500.00.
- Total Agreement:** Total Agreement Amount (\$) is \$32,500.00; Line Item Total (\$) is \$0.00; Difference (\$) is \$32,500.00.

Red boxes highlight the individual category sections and the total agreement section. A red arrow points to the "Total Agreement Amount" field.

At the bottom of the form, there are links for "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

Form Completion

- ▶ Scroll down and complete the Agreement Checklist and AG Checklist sections

The screenshot shows a web browser window with the title "Create New Professional Services Agreements - Project No. SFC-130888 - Google Chrome". The URL is "https://ohio-dev-unifier.oracleindustry.com/bp/process/new?wftemplate_id=3093&module_name=upsa1&csvimport=falsi". The browser's menu bar includes "File", "Edit", "View", "Actions", and "Help". The "Workflow Actions" dropdown is set to "-Select-". The browser toolbar shows icons for "Send", "Save", "Spelling...", "Add Attachment", "Discussion", "Cash Flow", and "Close Window".

The main content area is titled "Professional Services Agreements" and has a "General" tab selected. It contains several input fields with the following values:

- 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

A red rectangular box highlights the "Agreement Checklist" and "AG Checklist" sections. The "Agreement Checklist" section contains the following fields:

- Proposal Guideline: Yes *
- EEO Requirements: Yes *
- Licensed in Ohio: Yes *
- Agreement Summary: Yes *
- EDGE Participation: Yes *
- Professional Liability Insurance: Yes *
- Insurance Rating: (empty)

The "AG Checklist" section contains the following fields:

- Worker's Comp Certificate: -Select-
- Worker's Comp Certificate Exp. Date: (empty)
- Clean Search of State Auditor's Database: Yes *

At the bottom of the form, there are tabs for "Action Details" and "Agreement Details". Below the tabs are links for "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)". A red arrow points from the right side of the image towards the "Agreement Checklist" section.

Add Line Items

- ▶ 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.)
- ▶ To add Line Items click the Agreement Details tab

The screenshot displays a web browser window titled "Create New Professional Services Agreements - Project No. SFC-130888 - Google Chrome". The URL is https://ohio-dev-unifier.oracleindustry.com/bp/process/new?wftemplate_id=3093&module_name=upsa1&csvimport=false. The page is titled "Professional Services Agreements" and is in the "General" tab.

Financial Summary:

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

Agreement Checklist:

Proposal Guideline:	Yes	*
EEO Requirements:	Yes	*
Licensed in Ohio:	Yes	*
Agreement Summary:	Yes	*
EDGE Participation:	Yes	*
Professional Liability Insurance:	Yes	*
Insurance Rating:		

AG Checklist:

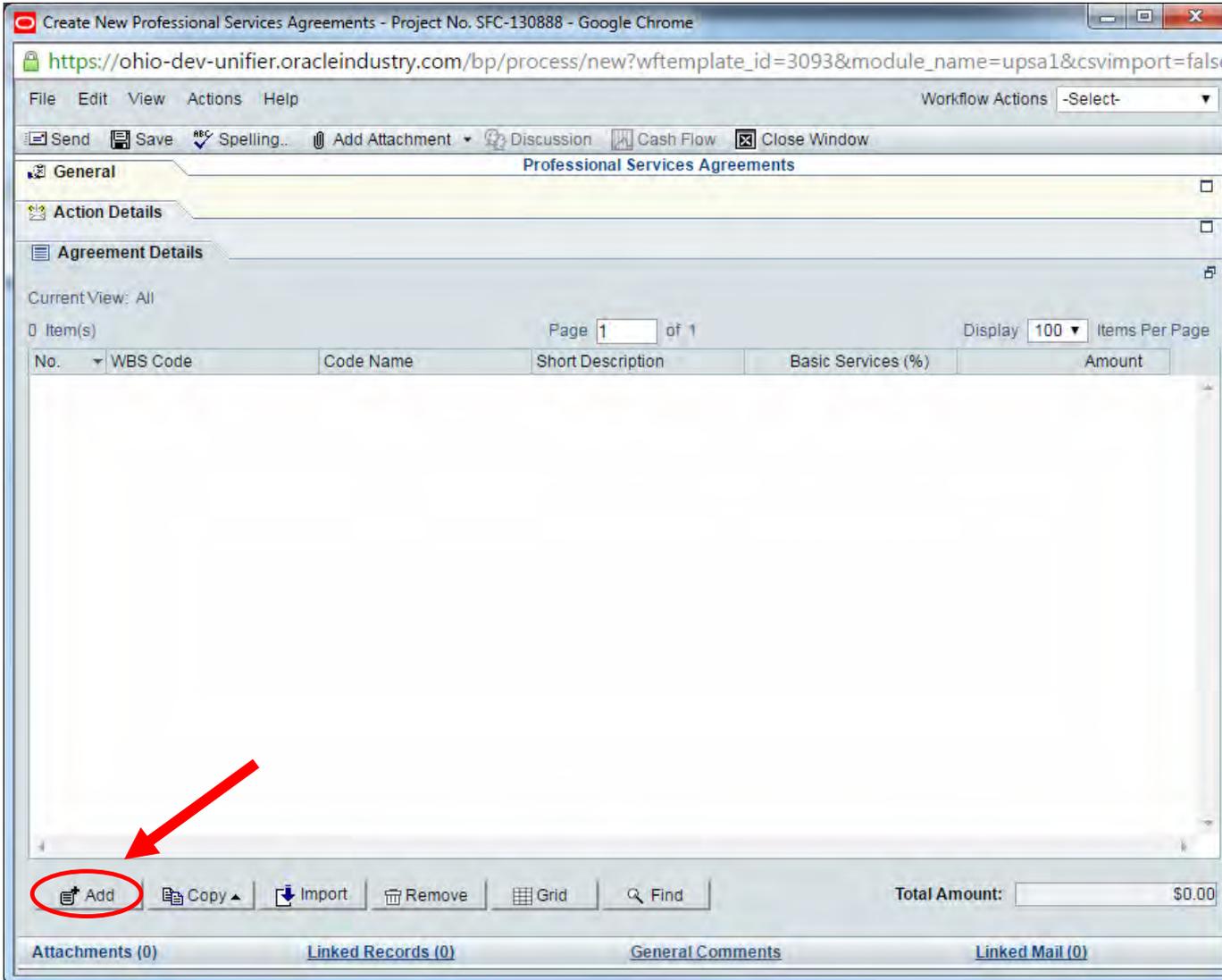
Worker's Comp Certificate:	-Select-	
Worker's Comp Certificate Exp. Date:		
Clean Search of State Auditor's Database:	Yes	*

Navigation:

- Action Details
- Agreement Details** (highlighted with a red circle and arrow)
- Attachments (0)
- Linked Records (0)
- General Comments
- Linked Mail (0)

Add Line Items

- ▶ Click Add



Create New Professional Services Agreements - Project No. SFC-130888 - Google Chrome

https://ohio-dev-unifier.oracleindustry.com/bp/process/new?wftemplate_id=3093&module_name=upsa1&cvsimport=false

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

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

No.	WBS Code	Code Name	Short Description	Basic Services (%)	Amount
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Add Copy Import Remove Grid Find Total Amount: \$0.00

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

WBS Codes

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

Line Item - Google Chrome
https://ohio-unifier.oracleindustry.com/bp/studio/bp/cost/itemopen?a=form.0&i

Professional Services Agreements Line Item:

General

WBS Code: 

Code Name:

Short Description: *

Professional Services EDGE

Certified?:

Subcontractor/Supplier:

EDGE Certified Sub?:

Fee Category (Enter all \$ to 1 category)

Basic Services Amount (\$):

Basic Services (%):

Reimbursable Cost Amount (\$):

Additional Services Amount (\$):

Allowance Amount (\$):

Notes:

Attachments (0) [Linked Records \(0\)](#)

WBS Picker - Google Chrome
https://ohio-unifier.oracleindustry.com/bp/budget/wbs/select_wbs_code?r

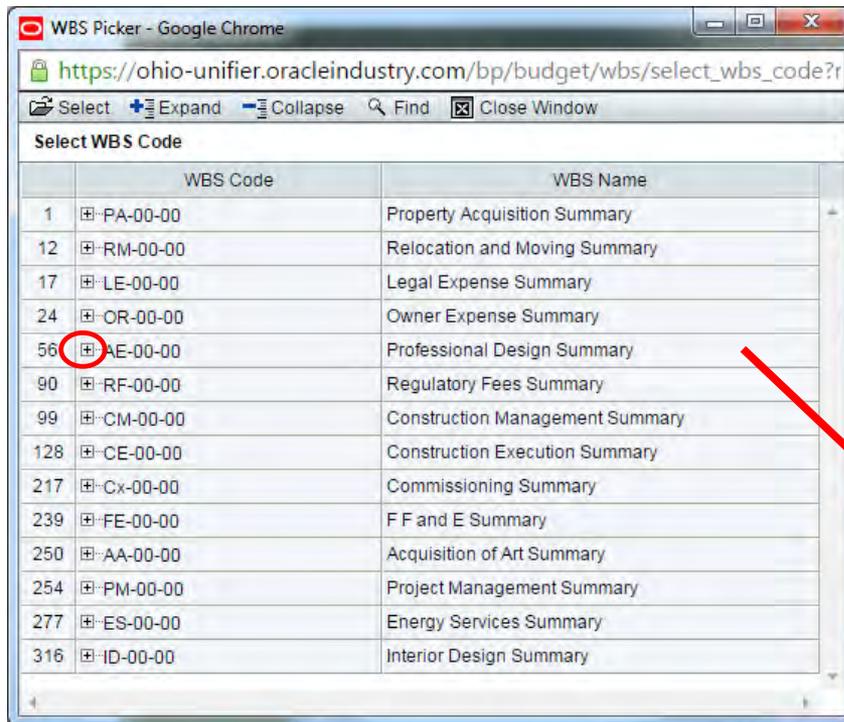
Select Find

Select WBS Code

	WBS Code	WBS Name
1	<input type="checkbox"/> PA-00-00	Property Acquisition Summary
2	<input type="checkbox"/> PA-PA-00	Property Acquisition General
3	PA-PA-BE	Property Acquisition Budget
4	PA-PA-RC	Real Estate Commission
5	PA-PA-AP	Real Estate Appraisal
6	<input type="checkbox"/> PA-LA-00	Land Acquisition Summary
7	PA-LA-BE	Land Acquisition Budget
8	PA-LA-OT	Land Acquisition Expense
9	<input type="checkbox"/> PA-EA-00	Easement Acquisition Summary
10	PA-EA-BE	Easement Acquisition Budget
11	PA-EA-OT	Easement Acquisition Expense
12	<input type="checkbox"/> RM-00-00	Relocation and Moving Summary
13	<input type="checkbox"/> RM-RM-00	Relocation and Moving Expense
14	RM-RM-BE	Relocation and Moving Budget
15	RM-RM-MX	Moving Expense
16	RM-RM-LS	Leased Temporary Space
17	<input type="checkbox"/> LE-00-00	Legal Expense Summary
18	<input type="checkbox"/> LE-LE-00	General Legal Expense
19	LE-LE-BE	Legal Expense Budget
20	LE-LE-CS	Legal Consulting Expense
21	LE-LE-DE	Legal Defense Expense
22	LE-LE-PA	Property Acquisition Legal Exp
23	LE-LE-BF	Bond Financing Legal Expense
24	<input type="checkbox"/> OR-00-00	Owner Expense Summary
25	<input type="checkbox"/> OR-OR-00	Owner Expense General

WBS Codes

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



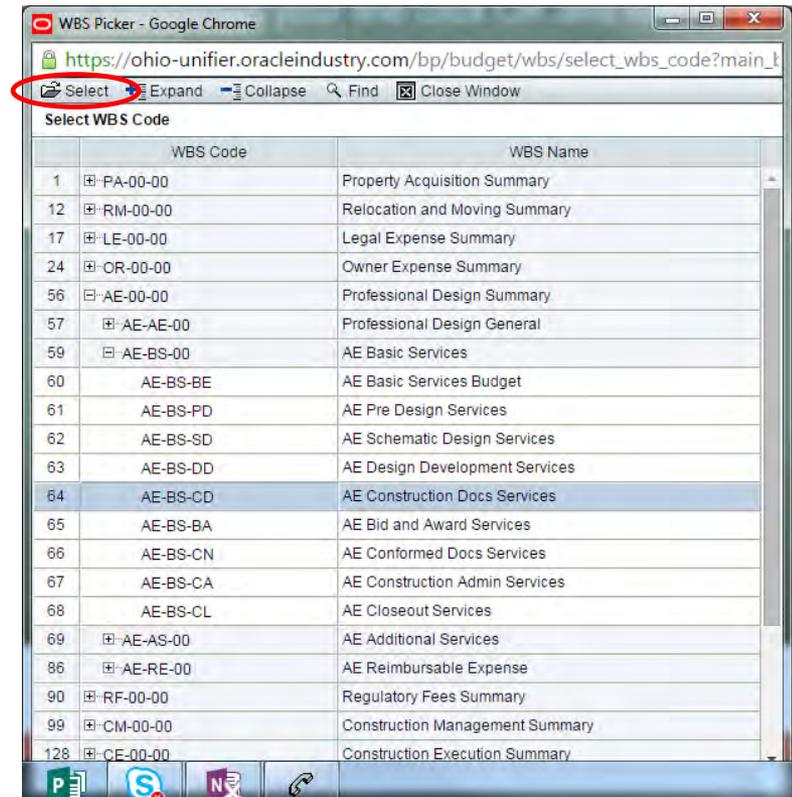
WBS Picker - Google Chrome

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

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_1

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
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

Line Item - Google Chrome

<https://ohio-unifier.oracleindustry.com/bp/studio/bp/cost/itemopen?a=form.0&i>

Spelling... Attach Delete Line Item

Professional Services Agreements Line Item:

General

WBS Code: AE-BS-PD

Code Name: AE Pre Design Services

Short Description: Pre design services

Professional Services EDGE

Certified?:

Subcontractor/Supplier: Select...

EDGE Certified Sub?:

Fee Category (Enter all \$ to 1 category)

Basic Services Amount (\$): \$15,000.00

Basic Services (%): 60

Reimbursable Cost Amount (\$): \$0.00

Additional Services Amount (\$): \$0.00

Allowance Amount (\$): \$0.00

Notes:

Attachments (0) Linked Records (0)

OK Cancel

Add Line Items

- ▶ Line Item will populate in Agreement Details

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

At the bottom of the page, there is a toolbar with "Add", "Copy", "Import", "Remove", "Grid", and "Find" buttons. To the right, it says "Total Amount: \$15,000.00". At the very bottom, there are links for "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

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

Allowance Amount (\$): \$2,500.00
Allowance Line Item Amount (\$): \$2,500.00
Difference (\$): \$0.00

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

Create New Professional Services Agreements

To: _____
Cc: _____
Send For: _____

Task Notes:

Agreement Details

Current View: All

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

No.	WBS Code	Code Name	Short Description	Basic Services (%)	Amount
005	AE-BS-CD	AE Construction Docs Services	docs services	0	\$2,500.00
004	AE-RE-DP	AE Document Printing	document printing	0	\$2,500.00
003	AE-AS-BC	AE Basic Commissioning	Basic Commissioning	0	\$2,500.00
002	AE-BS-DD	AE Design Development Services	Design Development	40	\$10,000.00
001	AE-BS-PD	AE Pre Design Services	Pre design	60	\$15,000.00

Total Amount: \$32,500.00

Submit Agreement

- ▶ Add any necessary documentation by clicking “Add Attachment”
 - ▶ **Reminder: Documents must first be uploaded into Document Manager**
- ▶ Choose a Workflow Action
- ▶ Click “to” and choose who to sent the record to

The screenshot displays a web application interface for creating professional services agreements. The main window shows a form with fields for Allowance Amount (\$2,500.00), Allowance Line Item Amount (\$2,500.00), and Difference (\$0.00). A 'Submit' button is highlighted in blue. A red arrow points to the 'Add Attachment' button in the top navigation bar. Another red arrow points to the 'To...' field in the 'Action Details' section. A 'User/Group Picker' dialog box is open, showing a list of users and groups, including Katie Tuttle, Moenique Morris, and Project Manager, all associated with the State of Ohio. The dialog box has 'Add', 'View Profile', and 'Members' buttons. The main window also shows a table of agreement details with columns for No., WBS Code, and Amount.

No.	WBS Code	Amount
005	AE-BS-CD	\$2,500.00
004	AE-RE-DP	\$2,500.00
003	AE-AS-BC	\$2,500.00
002	AE-BS-DD	\$10,000.00
001	AE-BS-PD	\$15,000.00

Submit Agreement

- ▶ “To” box will populate with the recipients name
- ▶ Click Send

The screenshot shows a web browser window titled "Create New Professional Services Agreements - Project No. SFC-130888 - Google Chrome". The URL is https://ohio-dev-unifier.oracleindustry.com/bp/process/new?wftemplate_id=3093&module_name=upsa1&csvimport=fal. The browser's menu bar includes File, Edit, View, Actions, and Help. The toolbar contains buttons for Send, Save, Spelling..., Add Attachment, Discussion, Cash Flow, and Close Window. The "Send" button is circled in red. Below the toolbar is the "General" section for "Professional Services Agreements" with input fields for Allowance Amount (\$), Allowance Line Item Amount (\$), and Difference (\$), all set to \$2,500.00, \$2,500.00, and \$0.00 respectively. The "Action Details" section contains a "Submit" button, a "To..." field with "Katie Tuttle", a "Cc..." field, and a "Send For:" field with "Technical Proposal Review". The "Agreement Details" section shows a table with 5 items and a "Total Amount:" of \$32,500.00.

No.	WBS Code	Code Name	Short Description	Basic Services (%)	Amount
005	AE-BS-CD	AE Construction Docs Serv	docs services	0	\$2,500.00
004	AE-RE-DP	AE Document Printing	document printing	0	\$2,500.00
003	AE-AS-BC	AE Basic Commissioning	Basic Commissioning	0	\$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	60	\$15,000.00

Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

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