



Professional Services Amendments

Agency/Higher-Ed

DocuSign Enabled Record

- ▶ The Professional Services Amendment record now utilizes DocuSign, which enables electronic signature of Amendments.
- ▶ Users who are sent an Agreement for signature via DocuSign do not need a separate account to sign the document. A separate DocuSign account is not required but you can sign up for one at docusign.net
- ▶ For more information about how to use DocuSign, please refer to the DocuSign Job Aid available on the OFCC Website

Notes on Amendments

- ▶ Revisions to the scope of work of a Professional Services Provider requires written authorization from the Contracting Authority
- ▶ Adjustments in basic services fees, additional services, or reimbursable expenses resulting from changes in scope of work or additional time must be processed and approved by the Contracting Authority with revisions in funding certified by the Owner

Purpose & Process

- ▶ The PS Amendment Business Process (BP):
 - ▶ Provides for the submission, review, and approval of amendments to the Professional Services Agreement
 - ▶ Provides the Amendment document and other necessary communication using custom prints
 - ▶ Allows the addition of new line items or modification of line item through use of the Reference selection
- ▶ Once the approval process has been completed, which includes funding, a “notice to proceed” will be sent to the Professional Services Provider authorizing work to begin

▶ Workflow

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

Create a Professional Services Amendment

- ▶ In Oaks CI navigate to:
 - ▶ Logs -> Professional Services Amendment
 - ▶ Click Create

The screenshot displays the Oracle Primavera Unifier (Development) interface. The top navigation bar shows 'Agency' and 'OAKS CI Trainin...'. The left sidebar menu is open, with 'Logs' circled in red. The main content area shows the 'Professional Services' section, with a '+ Create' button circled in red. Below this is a table with the following data:

	Title
	Student 2
	Amendment 1
	Main
	Amendment No. 1
	o
	Katie's Amendment #
	Test Amendment #1

A red arrow points from the 'Professional Services Amendments' menu item in the sidebar to the table below.

Form Completion

- ▶ Fill out the General section (All Items with a red * are required)
- ▶ To enter the Contract Reference, click Select and choose the appropriate contract
- ▶ Click the Amendment Details Tab

The screenshot displays a web application interface for 'Professional Services Amendments'. The main form is titled 'Professional Services Amendments' and is in the 'General' section. The form contains several fields, some of which are marked with a red asterisk (*), indicating they are required. The 'Contract Reference' field is highlighted with a red box, and a red arrow points to the 'Select...' dropdown menu next to it. A modal window is open, showing a table of available contracts.

Professional Services Amendments - General Section

Organization:	Department of Administrative Services	Record Number:	
Project Number:	OCI-090004	Creator:	Katie Tuttle
Project Name:	OAKS CI Training 4	Creation Date:	
Project Location:	4200 Surface Road	Status:	
Amendment No.:	22 *	Fee Title:	
Title:	Katie's Amendment #1 *	Amendment Execution Date:	
Contract Reference:	Test Agreement #1 Select... *	Professional Services Provider:	Amazing Architectural Inc.
Agreement Type:	Design	EDGE Certified Sub?:	
Other Description:		Amount (\$):	\$22,000.00 *

Summary of Additional Services/Reimbursables

Title	Professional Services Provider	Agreement Type
Migration 2	OCI Migration Inc	Design
Angie's Test	OCI Test General	SAO/Agency
test#2	OCI Test General	Design
Agreement w internal a/e	OCI Test General	Design
CI Agreement	OCI Test General	Design
Test Agreement	OCI Test General	Design

Form Navigation:

- Workflow Actions: Submit Amendme, Send, Save, Spelling, Add Attachment, Discussion, SOV, Close Window
- Summary of Additional Services/Reimbursables: Summary: [Empty]
- Bottom Navigation: Action Details, Amendment Details (circled in red), Attachments (0), Linked Records (0), Mail (0)

Add Line Items

- ▶ To add Line Items click Add
- ▶ If you are referencing a current line in your agreement click the select button next to Reference.
- ▶ Fill out the information marked with a red *
- ▶ Click “Save & Add New” to add another line, otherwise click “Save & Close”

Professional Services Amendments - Katie's Amendment #1 - Project No. OCI-090004 - Mozilla Firefox

Workflow Actions Submit Amendme Send Save Spelling.. Add Attachme

General Professional Se

Action Details

Amendment Details

Current View: All

0 Item(s) Page 1

No.	Reference	WBS Code	Code Name	Shor
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Attachments (0) Linked Records (0)

Add Copy Import Remove Grid Find

Attachments (0) Linked Records (0)

Line Item - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/studio/bp/cost/itemopen?a=form.0&id=

Spelling... Attach Delete Line Item

Professional Services Amendments Line Item:

General

Reference: 2 Select...

WBS Code: AE-AS-OT *

Code Name: AE Other Additional Services

Short Description: Additional services *

Professional Services EDGE Certified?:

Amount (\$): \$8,000.00 *

Subcontractor/Supplier: Select...

EDGE Certified Sub?:

Notes:

Attachments (0) Linked Records (0)

Save & Close Save & Add New Cancel

WBS Codes

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

Line Item - Mozilla Firefox


https://ohio-dev-unifier.oracleindustry.com/bp/studio/bp/cost/itemopen?a=form.0&id=

Spelling... Attach Delete Line Item

Professional Services Amendments Line Item:

General

Reference:

WBS Code: 

Code Name:

Short Description: *

Professional Services EDGE Certified?:

Amount (\$): *

Subcontractor/Supplier:

EDGE Certified Sub?:

Notes:

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

WBS Picker - Google Chrome

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

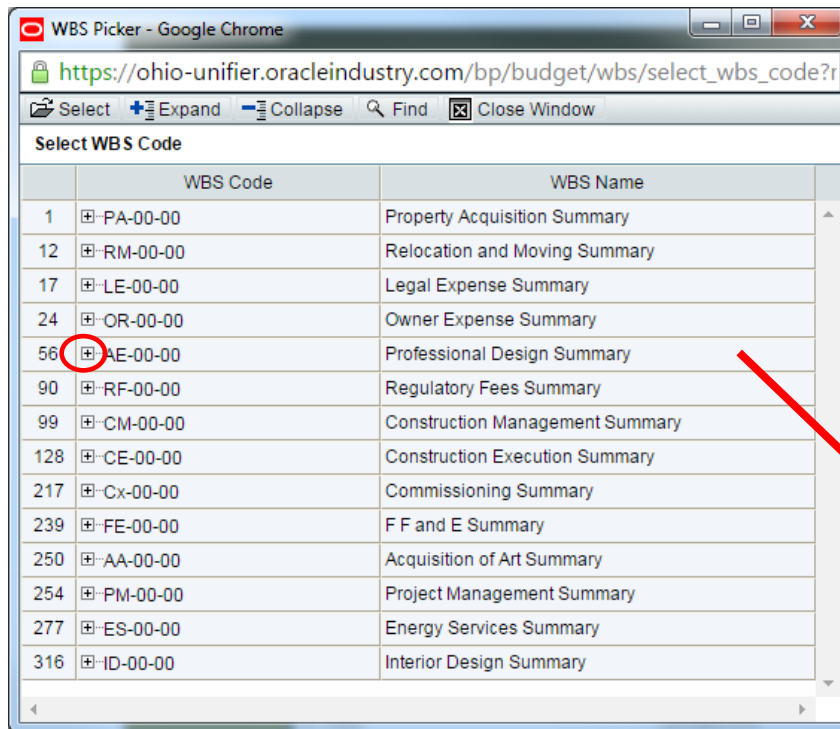
Select Expand Collapse Find Close Window

Select WBS Code

	WBS Code	WBS Name
1	PA-00-00	Property Acquisition Summary
2	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	PA-LA-00	Land Acquisition Summary
7	PA-LA-BE	Land Acquisition Budget
8	PA-LA-OT	Land Acquisition Expense
9	PA-EA-00	Easement Acquisition Summary
10	PA-EA-BE	Easement Acquisition Budget
11	PA-EA-OT	Easement Acquisition Expense
12	RM-00-00	Relocation and Moving Summary
13	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	LE-00-00	Legal Expense Summary
18	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	OR-00-00	Owner Expense Summary
25	OR-OR-00	Owner Expense General

WBS Codes

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

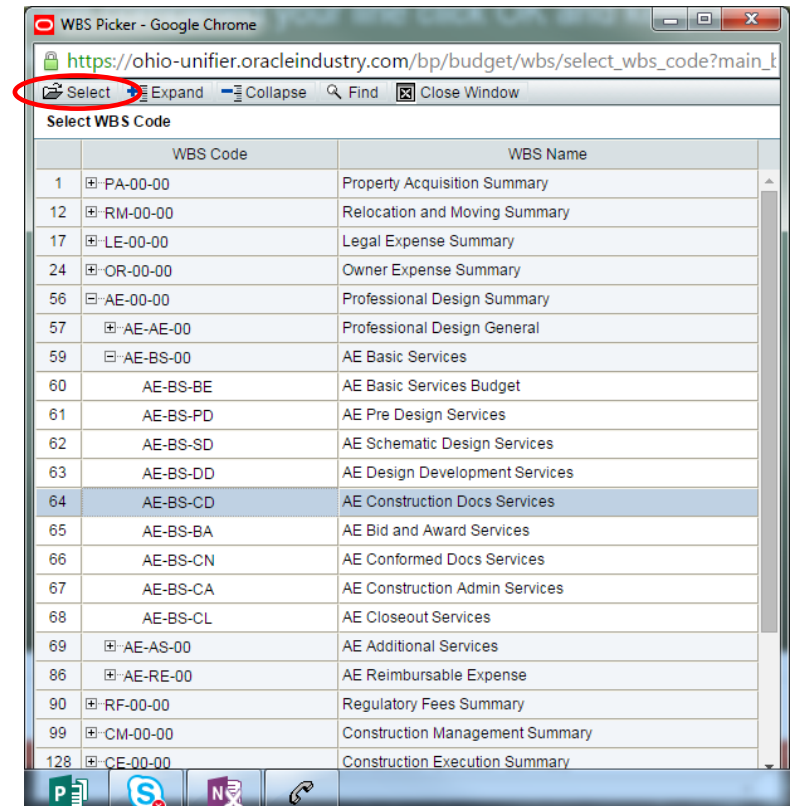


WBS Picker - Google Chrome

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

Select Expand Collapse Find Close Window

	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_t

Select Expand Collapse Find Close Window

	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

- ▶ Fill in the Remaining required fields
- ▶ Click “Save & Add New” to add another line, otherwise click “Save & Close”

Line Item - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/studio/bp/cost/itemopen?a=form.0&id=

Spelling... Attach Delete Line Item

Professional Services Amendments Line Item:

General

Reference: Select...

WBS Code: *

Code Name:

Short Description: *

Professional Services EDGE Certified?:

Amount (\$): *

Subcontractor/Supplier: Select...

EDGE Certified Sub?:

Notes:

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

Save & Close Save & Add New Cancel

Add Line Items

- ▶ When all lines have been added, the Total Amount should match the Amount from the General block and the Difference should be \$0.00

The screenshot shows a web application window titled "Professional Services Amendments - Katie's Amendment #1 - Project No. OCI-090004 - Mozilla Firefox". The URL is https://ohio-dev-unifier.oracleindustry.com/bp/process/new?copy=1&fromModel=upsa2&fromSource=cost&fromModelId=584&module_name. The interface includes a menu bar (File, Edit, View, Actions, Help) and a toolbar with various workflow actions like "Submit Amendment", "Send", "Save", "Spelling..", "Add Attachment", "Discussion", "SOV", and "Close Window".

The main content area is divided into several sections:

- General:** Contains fields for Agreement Type (Design), Other Description, and EDGE Certified Sub?. A summary table is highlighted with a red box:

Amount (\$):	\$22,000.00 *
Line Item Total (\$):	\$22,000.00
Difference (\$):	\$0.00

A red arrow points to this summary table.

- Summary of Additional Services/Reimbursables:** A section for listing additional services.
- Action Details:** Includes a "Submit Amendment Proposal" section with "To..." (Archana Atrey, Barbara Taylor, Bill Schwertfager) and "Cc..." fields, and a "Send For:" field set to "Amendment Proposal Review".
- Amendment Details:** Shows a table of line items:

No.	Reference	WBS Code	Code Name	Short Description	Amount
001	2	AE-AS-OT	AE Other Additional Services	Additional services	\$8,000.00
002	0	AE-BS-PD	AE Pre Design Services	Additional services	\$14,000.00

The bottom of the interface features a toolbar with "Add", "Copy", "Import", "Remove", "Grid", and "Find" buttons. A "Total Amount:" field is circled in red, showing a value of \$22,000.00.

Submit Amendment

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

Professional Services Amendments - Katie's Amendment #1 - Project No. OCI-090004 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/new?copy=1&fromModel=upsa2&fromSource=cost&fromModelId=584&module_name

File Edit View Actions Help

Workflow Actions Submit Amendment Send Save Spelling.. Add Attachment Discussion SOV Close Window

General Professional Services Amendments

Agreement Type: Design

Other Description:

EDGE Certified Sub?:

Amount (\$): \$22,000.00 *

Line Item Total (\$): \$22,000.00

Difference (\$): \$0.00

Summary of Additional Services/Reimbursables

Action Details

Submit Amendment Proposal

To... Archana Atrey,Barbara Taylor,Bill Schwerfager

Cc...

Send For: Amendment Proposal Review

Task Notes:

Workflow Progress

Amendment Details

Current View: All

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

No.	Reference	WBS Code	Code Name	Short Description	Amount
001	2	AE-AS-OT	AE Other Additional Services	Additional services	\$8,000.00
002	0	AE-BS-PD	AE Pre Design Services	Additional services	\$14,000.00

Add Copy Import Remove Grid Find Show Filtered Total Amount Total Amount: \$22,000.00

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

Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

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