



# 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 Amendment 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

- ▶ 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

# 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**

# Roles & Responsibilities

- ▶ Professional Services Provider
  - ▶ Initiates the amendment process
  - ▶ Creates the amendment record
  - ▶ Negotiates the scope and terms of the Amendment
  - ▶ Signs the Amendment document
  - ▶ Currently, a blue ink signature is required in addition to accepting the electronic amendment record
- ▶ Contracting Authority
  - ▶ Reviews the Amendment
  - ▶ Signs the completed Amendment document for the State
  - ▶ Currently, a blue ink signature is required in addition to accepting the electronic amendment record
- ▶ Project Coordinator
  - ▶ Prepares the Amendment document and supporting documentation seeking the release and certification of funding by the Owner
  - ▶ Coordinates distribution of the various documents throughout the process

# Roles & Responsibilities

- ▶ Project Manager
  - ▶ Negotiates the scope and terms of the amendment with the professional services provider
  - ▶ Reviews the amendment
  - ▶ Forwards the recommended amendment record to the project coordinator for amendment preparation
- ▶ Project Manager Supervisor
  - ▶ Reviews and recommends approval or revisions to amendments negotiated by the Project Manager
- ▶ Owner
  - ▶ Concurs with the amendment
  - ▶ Obtains funding in the form of a purchase order

# Create a Professional Services Amendment

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

The screenshot displays the Oracle Primavera Unifier web application. The browser tabs include 'Home', 'Agency General...', 'BCIL London Ga...', and 'Ross Full Servic...'. The address bar shows 'Navigate To...' and the breadcrumb path is 'Agency > OAKS'. The main interface is divided into a left-hand navigation menu and a right-hand content area. In the navigation menu, the 'Logs' option is circled in red, and a red arrow points to the 'Professional Services Amendments' option at the bottom of the list. In the content area, the 'New' button in the top toolbar is also circled in red. Below the toolbar, the content area shows a table titled 'Professional Services Amendments - Current View: All' with 5 items. The table has two columns: 'Title' and 'Agreement Name'. The data rows are:

Title	Agreement Name
Amendment #1	Test Agreement
Migration	Migration 2
Migration	Migration 2
Hooks	Agreement w interna
test#2	test#2

# Form Completion

- ▶ Fill out the General block (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 the 'Create New Professional Services Amendments' form in a web browser. The form is titled 'Professional Services Amendments' and is currently on the 'General' tab. The 'Contract Reference' field is highlighted with a red box and a red arrow pointing to a 'Select...' dropdown menu. The form contains the following fields:

- Organization: Department of Administrative Service
- Project Number: OCI-080001
- Project Name: Agency General Projects Test
- Project Location: OAKS CI Administration
- Amendment No.: 001 \*
- Title: Amendment #1 \*
- Contract Reference: Test Agreement (with a 'Select...' dropdown) \*
- Agreement Type: Design
- Other Description: (empty)
- Record Number: (empty)
- Creator: Katie Tuttle
- Creation Date: (empty)
- Status: (empty)
- Fee Title: SAO Standard Fee 1
- Amendment Execution Date: (empty)
- Professional Services Provider: OCI Test General
- EDGE Certified Sub?: Yes
- Amount (\$): \$12,000.00 \*
- Line Item Total (\$): \$0.00

A secondary window titled 'Professional Services Agreements' is open, showing a list of agreements. The table below represents the data shown in this window:

Title	Professional Services Provider	Agreement Type
Migration 2	OCI Migration Inc	Design
Angle'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

# 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 OK

The screenshot displays the Oracle Primavera P6 Professional Services Amendments interface. The main window shows a table with one line item:

No.	Reference	WBS Code	Code Name	Short Description
001	2	AE-BS-DD	AE Design Development Services	Design

The modal window titled "Line Item - Google Chrome" shows the "Professional Services Amendments Line Item" form. The "Reference" field is set to "2" and has a "Select..." button next to it. The "WBS Code" is "AE-BS-DD", "Code Name" is "AE Design Development Services", "Short Description" is "Design", "Professional Services EDGE Certified?" is "Yes", and "Amount (\$)" is "\$6,000.00". The "Subcontractor/Supplier" field has a "Select..." button. The "Amount (\$)" field is marked with a red asterisk (\*). The "Add" button in the main window is also circled in red.

# 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 Amendments Line Item:

General

Reference:  Select...

WBS Code:  

Code Name:

Short Description:  \*

Professional Services EDGE Yes

Certified?:

Amount (\$):  \$0.00 \*

Subcontractor/Supplier:  Select...

EDGE Certified Sub?:

Notes:

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

OK Cancel

WBS Picker - Google Chrome  
https://ohio-unifier.oracleindustry.com/bp/budget/wbs/select\_wbs\_code?r

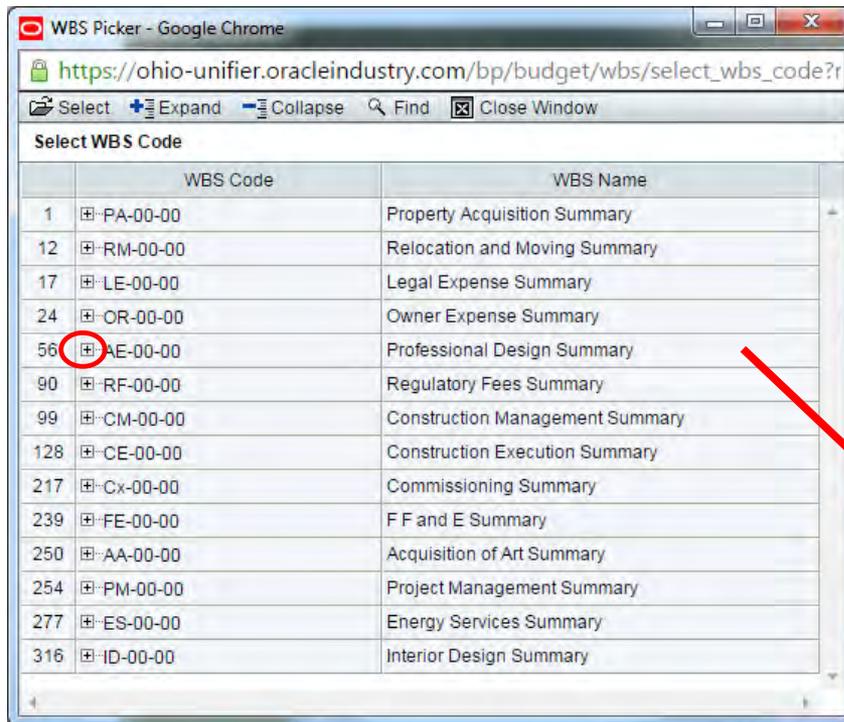
Select  Expand  Collapse  Find  Close Window

Select WBS Code

	WBS Code	WBS Name
1	<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



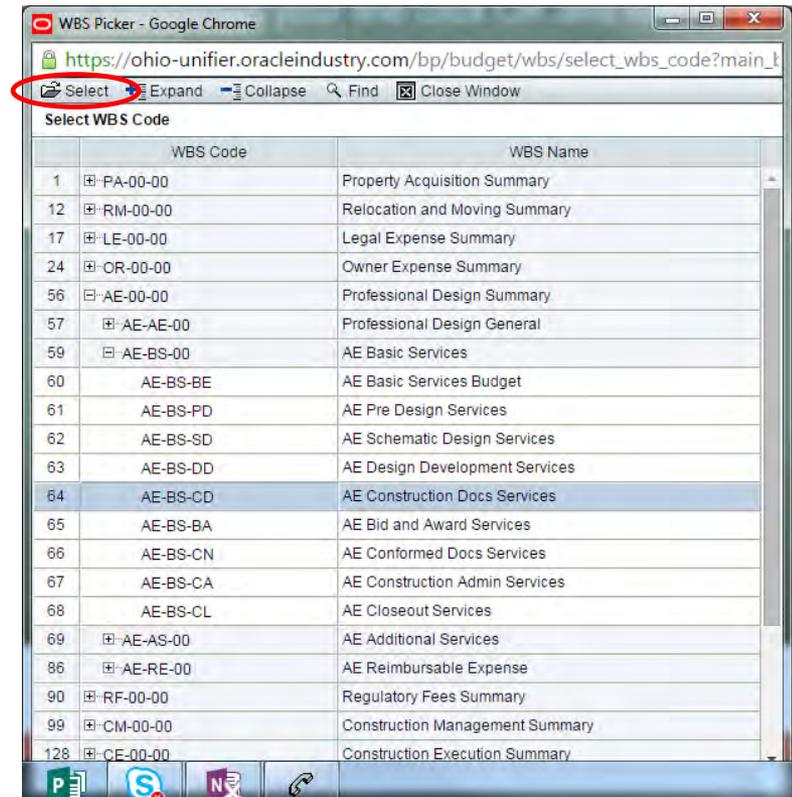
WBS Picker - Google Chrome

[https://ohio-unifier.oracleindustry.com/bp/budget/wbs/select\\_wbs\\_code?r](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](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

- ▶ Fill in the Remaining required fields
- ▶ 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 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 \(0\)](#)

OK Cancel

# Add Line Items

- ▶ Continue adding line items
- ▶ The Total Amount should match the Amount from the General block and the Difference should be \$0.00

Professional Services Amendments - Amendment #1 - Project No. OCI-080001 - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/process/task/opendraft?task\_id=963615&id=112845&sourceId=0&

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling... Add Attachment Discussion SOV Close Window

### Professional Services Amendments

**General**

Contract Reference: [Test Agreement] Select... Professional Services Provider: OCI Test General

Agreement Type: Design EDGE Certified Sub?: Yes

Other Description: [ ]

Amount (\$): \$12,000.00 \*

Line Item Total (\$): \$12,000.00

Difference (\$): \$0.00

Summary of Additional Services/Reimbursables

**Action Details**

Create New Professional Services Amendments

To: [ ] Task Notes:

Cc: [ ]

Send For:

**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-BS-DD	AE Design Development Services	Design	\$6,000.00
002	4	AE-AS-BE	AE Additional Services Budget	additional services	\$6,000.00

Add Copy Import Remove Grid Find

Total Amount: \$12,000.00

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

# Submit Amendment

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

Professional Services Amendments - Amendment #1 - Project No. OCI-080001 - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/process/task/opendraft?task\_id=963615&id=112845&sourceId=0&project\_id

File Edit View Actions Help

Workflow Actions Submit Amendme  
Submit Amendment Pro

Send Save Spelling... Add Attachment Discussion SOV Close Window

Professional Services Amendments

General

General

Organization: Department of Administrative Service Record Number:

Project Number: OCI-080001 Creator: Katie Tuttle

Project Name: Agency General Projects Test Creation Date:

Project Location: OAKS CI Administration Status:

Amendment No: 001

Action Details

Submit Amendment Proposal

To: Katie Tuttle, Moenique Morris, Rita Nichols, Sara

Cc:

Send For: Amendment Proposal Review

Task Notes:

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-BS-DD	AE Design Development Services	Design	\$6,000.00
002	4	AE-AS-BE	AE Additional Services Budget	additional services	\$6,000.00

Add Copy Import Remove Grid Find

Total Amount: \$12,000.00

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

# Questions?

Please contact OAKS CI Support Desk:

[oaksci@ofcc.ohio.gov](mailto:oaksci@ofcc.ohio.gov)

614.644.2211