



Professional Services Pay Request Consultants

Purpose and Procedure

- ▶ All Pay Requests will be submitted through the **SFC-150999** Consultant List Project. All other work will be done in your Agency Project (e.g. DNR, DRC, etc.)
- ▶ Provides for the submission, review, and approval of interim or final payment requests for services completed by the consultant
- ▶ References and relates directly to the schedule of values (SOV) line item amounts as outlined in the Consultant's Agreement
- ▶ Workflow
Created by: **Consultant** → Submitted to: **Project Manager Approval** → Sent to: **Consultant Update (if necessary)** → Sent to: **Consultant Contract Manager for Validation** → Sent to: **OFCC for Payment Process**

Creation Step

- ▶ Consultant:
 - ▶ Creates the Professional Services Pay Request
 - ▶ Submits the Request for Approval
 - ▶ **Note:** Any documents that need attached to the pay request must be uploaded into Document Manager first
 - ▶ For information on Document Manager, please refer to the Job Aid on the OFCC website, ofcc.ohio.gov, under **All Users**

PS Pay Request Creation

- ▶ In Oaks CI navigate to:
 - ▶ Logs -> Professional Services Pay Request
 - ▶ Click New

The screenshot displays the Oracle Primavera Unifier web application. The top navigation bar includes the Oracle logo, the application name 'PRIMAVERA Unifier', and the user name 'Proxy for Katie Tuttle'. Below the navigation bar, there are several tabs: 'Agency General...', 'Company Works...', and 'OFCC Consulta...'. The main content area is divided into two panes. The left pane, titled 'User', contains a list of navigation options. The 'Logs' option is circled in red, and a red arrow points from the text 'Click New' in the list to the 'Logs' option. Below 'Logs', the 'Professional Services Pay Request' option is highlighted with a red bar. The right pane, titled 'Admin', shows a table of 'Professional Services Pay Request' items. The table has columns for 'Title' and 'Agreement Name'. The 'New' button in the top right corner of the right pane is also circled in red.

Title	Agreement Name
DPS-150002 PR7 DNK Architects	DPS-150002 Batavia Post 13
ADJ-160014 PR1 PRIME AE	ADJ-160014 Rickenbacker#
ADJ-160020, PR1, GPD Group	ADJ-160020 DSCC Bldg. 24
DPS-140002 PR9 Phillip Markwo	DPS-140002 Shipley Bldg In
ADJ-160032 PR1 Karpinski Engin	ADJ-160032 Stow Armory Pa
ADJ-15B13, PRI, Star Consultaan	ADJ-150B13 East Seney Car
ADJ-150011 PR10 GPD Group	ADJ-150011 Rickenbacker B
AGO-150003 PR8 Alan Scherr As	AGO-150003 BCI London Ga
DRC-15F171 PR2 STAR	DRC-15F171 Franklin Pre-R
ADJ-160022 PR2 Alan Scherr As	ADJ-160022 St Mary's Arm
ADJ-160021 PR2 Alan Scherr As	ADJ-160021 Lebanon Arm
DVS-160003 PR2 Kleingers Grou	DVS-160003 Georgetown Pa
OSD-160002 PR7 Davis Wince	OSD-160002 Kitchen
ADJ-160031 PR1 American Struc	ADJ-160031 McConnelsville
DRC-140060 PR7 M Engineering	DRC-140060 PCI Electric Ph
DRC-140060 PR6 M Engineering	DRC-140060 PCI Electric Ph
EXP-150003 PR 4 Karpinski	EXP-150003 Cx Karpinski
DAS-160013 PR5 Karpinski Engin	DAS-160013 Cooling Towers
JFS-150702 PR1 Buehrer Group	JFS-150702 Lima Capital Im
DMH-160003 PR2 Buehrer Group	DMH-160003 Dietary Kitcher

Complete Form

- ▶ Fill out the information in the General and Payment Requested blocks

Create New Professional Services Pay Request - Project No. OCI-100001 - Google Chrome

https://ohio-dev-unifier.oracleindustry.com/bp/process/new?project_id=1016&module_name=upspr&csvimport=false&_

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Add Attachment Discussion SOV Close Window

General Professional Services Pay Request

General

Organization: Ohio Facilities Construction Commission Record Number:

Project Number: OCI-100001 Creator: Katie Tuttle

Project Name: SAO Consultant List Creation Date:

Project Location: 30 West Spring Street Status:

Title: Test Consultant PR * Internal Ref. Number:

Contract Reference: DRC-150002 Archie Select.. * Professional Services Provider: Archie's Architectural Inc.

Agreement type: Study EDGE Certified Sub?: Yes

Other Description: Facility Plan Received Date:

Period From: 06/01/2016 05:00 PM (UTC-8) * Period To: 06/01/2016 05:00 PM (UTC-8) *

Payment Requested

Final Payment?: No * Amount (\$): \$5,000.00 *

Invoices for Reimbursable Exp. Attached?: No * Line Item Total (\$): \$0.00

Difference (\$): \$5,000.00

Notes:

Action Details

Pay Request Details

Attachments (0) [Linked Records \(0\)](#) [General Comments](#) [Linked Mail \(0\)](#)

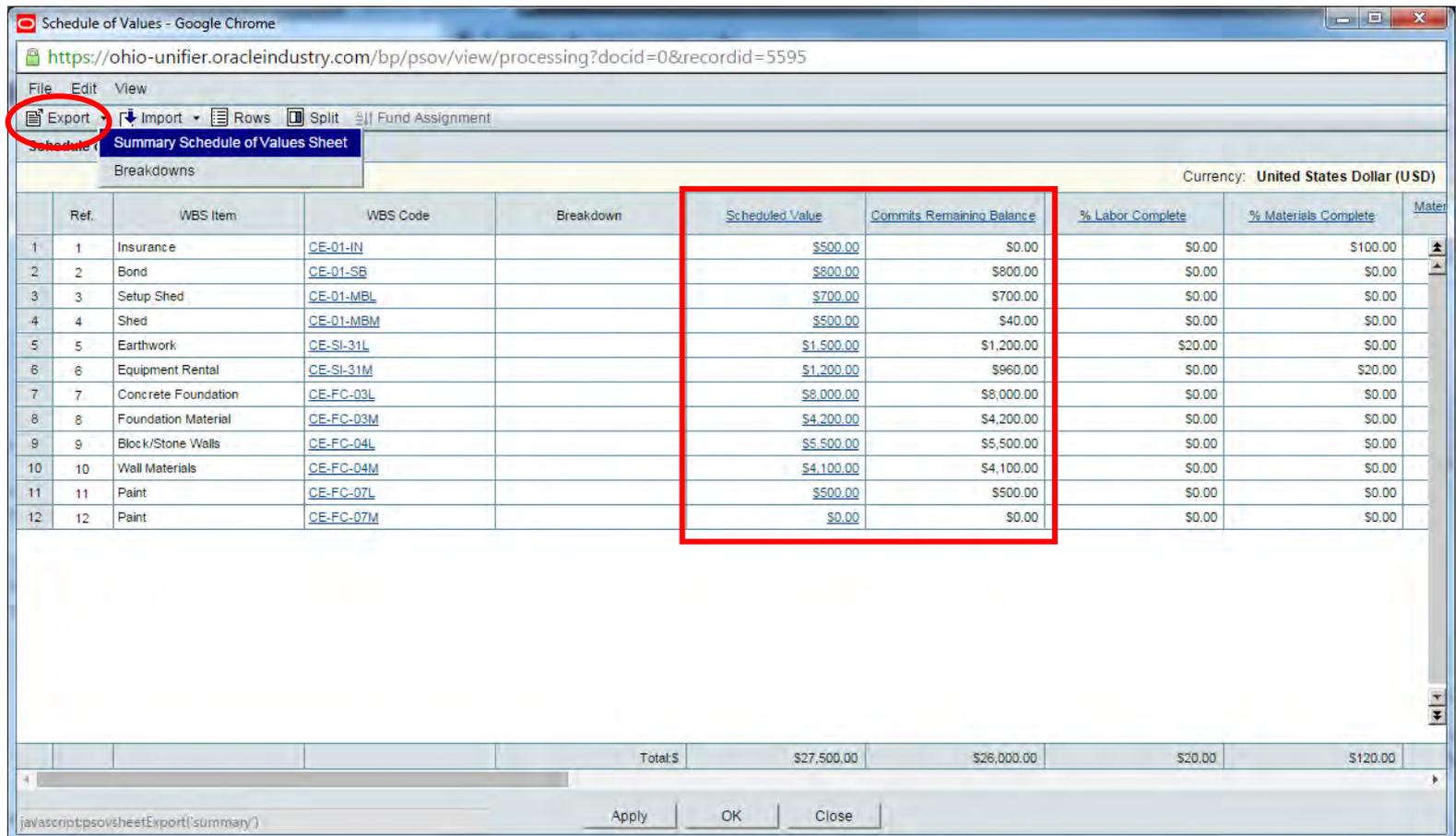
Review SOV

- ▶ Prior to adding lines to your pay request, you may want to view the remaining balance on your SOV (Schedule of Values)
- ▶ Click SOV at the top of your window

The screenshot shows a web browser window titled "Create New Contractor Pay Request - Project No. OCI-080001 - Google Chrome". The address bar displays the URL: https://ohio-unifier.oracleindustry.com/bp/process/new?project_id=1003&module_name=ucpr&csvimport=false. The browser's menu bar includes "File", "Edit", "View", "Actions", and "Help". Below the menu bar, there are icons for "Send", "Save", "Spelling...", "Add Attachment", "Discussion", "SOV", and "Close Window". The "SOV" button is circled in red, and a red arrow points to it from the right. The main content area is titled "Contractor Pay Request" and has tabs for "General", "Action Details", and "Pay Request Details". Below the tabs, it shows "Current View: All", "0 Item(s)", "Page 1 of 1", and "Display 100 Items Per Page". A table with the following columns is visible: "No.", "WBS Code", "Commit Short Description", "Scheduled Value", "Previously Earned", "Earned This Period", "% Labor Complete", "% Materials Complete", "% Services Complete", and "DPE or Reimb". At the bottom right, there is a "Total Amount:" field showing "\$0.00". The footer contains links for "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

Review SOV

- ▶ This allows you to look at the Scheduled Value and Commits Remaining Balance for each of the line items on your SOV
- ▶ You can also export the SOV to Excel by clicking Export and choosing the Summary Schedule of Values Sheet



Screenshot of a web browser displaying a Schedule of Values (SOV) table. The browser window title is "Schedule of Values - Google Chrome" and the URL is "https://ohio-unifier.oracleindustry.com/bp/psov/view/processing?docid=0&recordid=5595". The browser menu bar shows "File", "Edit", and "View". The "Export" button is circled in red, and a red arrow points to it. A dropdown menu is open, showing "Summary Schedule of Values Sheet". The table below shows the SOV data, with the "Scheduled Value" and "Commits Remaining Balance" columns highlighted in red.

Ref.	WBS Item	WBS Code	Breakdown	Scheduled Value	Commits Remaining Balance	% Labor Complete	% Materials Complete	Material
1	Insurance	CE-01-IN		\$500.00	\$0.00	\$0.00	\$100.00	
2	Bond	CE-01-SB		\$800.00	\$800.00	\$0.00	\$0.00	
3	Setup Shed	CE-01-MBL		\$700.00	\$700.00	\$0.00	\$0.00	
4	Shed	CE-01-MBM		\$500.00	\$40.00	\$0.00	\$0.00	
5	Earthwork	CE-SI-31L		\$1,500.00	\$1,200.00	\$20.00	\$0.00	
6	Equipment Rental	CE-SI-31M		\$1,200.00	\$960.00	\$0.00	\$20.00	
7	Concrete Foundation	CE-FC-03L		\$8,000.00	\$8,000.00	\$0.00	\$0.00	
8	Foundation Material	CE-FC-03M		\$4,200.00	\$4,200.00	\$0.00	\$0.00	
9	Block/Stone Walls	CE-FC-04L		\$5,500.00	\$5,500.00	\$0.00	\$0.00	
10	Wall Materials	CE-FC-04M		\$4,100.00	\$4,100.00	\$0.00	\$0.00	
11	Paint	CE-FC-07L		\$500.00	\$500.00	\$0.00	\$0.00	
12	Paint	CE-FC-07M		\$0.00	\$0.00	\$0.00	\$0.00	
Total:				\$27,500.00	\$26,000.00	\$20.00	\$120.00	

JavaScript: psovsheetExport('summary')

Apply OK Close

Review SOV

- ▶ This is how your SOV will look in Excel
- ▶ **Note:** This file is for reference only. It cannot be re-imported into OAKS CI

Line Item	WBS Item	WBS Code Breakdown	Scheduled Value	Commits Remaining Balance	% Labor Complete	% Materials Complete
1	Insurance	CE-01-IN	\$500.00	\$0.00	\$0.00	\$100.00
2	Bond	CE-01-SB	\$800.00	\$800.00	\$0.00	\$0.00
3	Setup Shed	CE-01-MBL	\$700.00	\$700.00	\$0.00	\$0.00
4	Shed	CE-01-MBM	\$500.00	\$40.00	\$0.00	\$0.00
5	Earthwork	CE-SI-31L	\$1,500.00	\$1,200.00	\$20.00	\$0.00
6	Equipment Rental	CE-SI-31M	\$1,200.00	\$960.00	\$0.00	\$20.00
7	Concrete Foundation	CE-FC-03L	\$8,000.00	\$8,000.00	\$0.00	\$0.00
8	Foundation Material	CE-FC-03M	\$4,200.00	\$4,200.00	\$0.00	\$0.00
9	Block/Stone Walls	CE-FC-04L	\$5,500.00	\$5,500.00	\$0.00	\$0.00
10	Wall Materials	CE-FC-04M	\$4,100.00	\$4,100.00	\$0.00	\$0.00
11	Paint	CE-FC-07L	\$500.00	\$500.00	\$0.00	\$0.00
12	Paint	CE-FC-07M	\$0.00	\$0.00	\$0.00	\$0.00

Add Line Items

- ▶ Click on the Pay Request Detail Tab
- ▶ Click Add

The screenshot shows a web browser window titled "Create New Professional Services Pay Request - Project No. SFC-130888 - Google Chrome". The URL is https://ohio-dev-unifier.oracleindustry.com/bp/process/new?project_id=1040&module_name=upspr&csvimport=false&. The browser's menu bar includes File, Edit, View, Actions, and Help. The main content area is titled "Professional Services Pay Request" and has several tabs: "General", "Action Details", and "Pay Request Details". The "Pay Request Details" tab is selected and circled in red. Below the tabs, there is a "Current view: All" label and a table with columns: No., WBS Code, Code Name, Short Description, and Amount. The table is currently empty. At the bottom of the interface, there is a toolbar with buttons for "Add", "Copy", "Import", "Remove", "Grid", and "Find". The "Add" button is circled in red, and a red arrow points to it from the left. To the right of the toolbar, there is a "Total Amount:" label followed by a text box containing "\$0.00". At the very bottom, there are links for "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

Add Line Items

- ▶ Click on the arrow next to WBS Code
- ▶ Choose the appropriate WBS Code and click Select
- ▶ Enter a Short Description and the Amount
- ▶ Click OK

Line Item - Google Chrome

https://ohio-dev-unifier.oracleindustry.com/bp/studio/bp/cost/itemopen?a:

Spelling... Attach Delete Line Item

Professional Services Pay Request Line Item:

General

WBS Code: AE-AS-SU *

Code Name: AE Site Surveying Services

Short Description: Site Survey *

Professional Services EDGE Certified?: No

Amount (\$): \$5,000.00 *

Subcontractor/Supplier: Select...

EDGE Certified Sub?:

Notes:

Attachments (0) Linked Record

OK Cancel

SOV Picker - Google Chrome

https://ohio-dev-unifier.oracleindustry.com/bp/sov/picker?record

Select Find Close Window

SOV Picker

	Ref	Description	WBS Code
1	1	Services	AE-AS-SU
2	2	Toledo Seg 1	AE-BS-BA

Add Line Items

- ▶ Continue Adding Line Items as necessary
 - ▶ Line item information displays in the Pay Request Details
 - ▶ Continue to enter line items as necessary
 - ▶ Ensure that the dollar amount entered in the top of the form matches the dollar amount in the lower form

Create New Professional Services Pay Request - Project No. OCI-100001 - Google Chrome

https://ohio-dev-unifier.oracleindustry.com/bp/process/new?project_id=1016&module_name=upspr&csvimport=false&

File Edit View Actions Help Workflow Actions -Select-

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

Professional Services Pay Request

General

Payment Requested

Final Payment?: No

Invoices for Reimbursable Exp. Attached?: No

Amount (\$): \$5,000.00

Line Item Total (\$): \$5,000.00

Difference (\$): \$0.00

Notes:

Action Details

Create New Professional Services Pay Request

To: []

Cc: []

Send For:

Pay Request Details

Current View: All

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

No.	WBS Code	Code Name	Short Description	Amount
001	AE-AS-EN	AE Environmental Survey	survey	\$5,000.00

Add Copy Import Remove Grid Find

Total Amount: \$5,000.00

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

Add Attachments

- ▶ Upload all documents to Document Manager prior to attaching documents to PS Pay Request record
- ▶ Click Add Attachment
- ▶ Choose Unifier Folder and locate your documents
- ▶ Select File and click OK

The screenshot displays the 'Create New Professional Services Pay Request' web application. The 'Add Attachment' button is highlighted with a red box, and a red arrow points to the 'Unifier Folder' dropdown menu. An inset window shows the 'Select Files' dialog with a file tree and a list of documents.

Current Phase

- Documents
- 0000 Concept Development
- 0100 Acquisition
- 0200 Design
- 0300 Construction
- 0400 Post Construction
- 0500 Extra Services
- 0600 Budget
- Test Uploads

Documents - Current View: All

	Ref.	BP	Name	Size	Upload Date
			0300 Construction		
			0400 Post Construction		
			0500 Extra Services		
			0600 Budget		
			Test Uploads		
			Test doc 5.docx	13 KB	12/03/2014
			test.docx	10 KB	04/16/2010

Pay Request Details

Current View: All

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

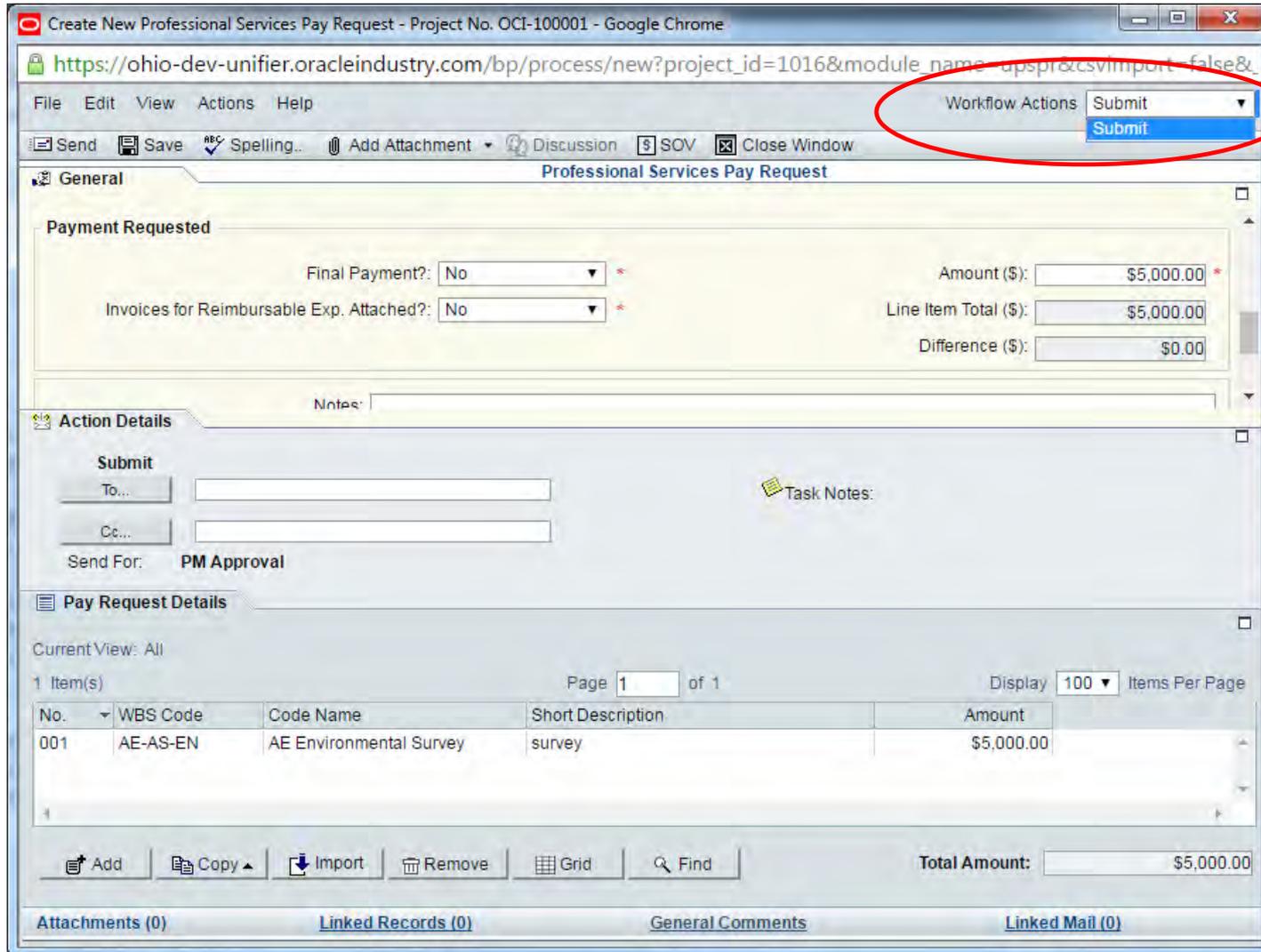
No.	WBS Code	Code Name	Short Description	Amount
001	AE-AS-SU	AE Site Surveying Services	Site Survey	\$5,000.00

Total Amount: \$5,000.00

Attachments (2) [Linked Records \(0\)](#) [General Comments](#) [Linked Mail \(0\)](#)

Submit Record

- ▶ Choose Workflow Action **Submit**



Create New Professional Services Pay Request - Project No. OCI-100001 - Google Chrome

https://ohio-dev-unifier.oracleindustry.com/bp/process/new?project_id=1016&module_name=apspr&csvimport=false&

File Edit View Actions Help

Workflow Actions **Submit**

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

Professional Services Pay Request

General

Payment Requested

Final Payment?: No

Invoices for Reimbursable Exp. Attached?: No

Amount (\$): \$5,000.00

Line Item Total (\$): \$5,000.00

Difference (\$): \$0.00

Notes:

Action Details

Submit

To...

Cc...

Send For: **PM Approval**

Task Notes:

Pay Request Details

Current View: All

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

No.	WBS Code	Code Name	Short Description	Amount
001	AE-AS-EN	AE Environmental Survey	survey	\$5,000.00

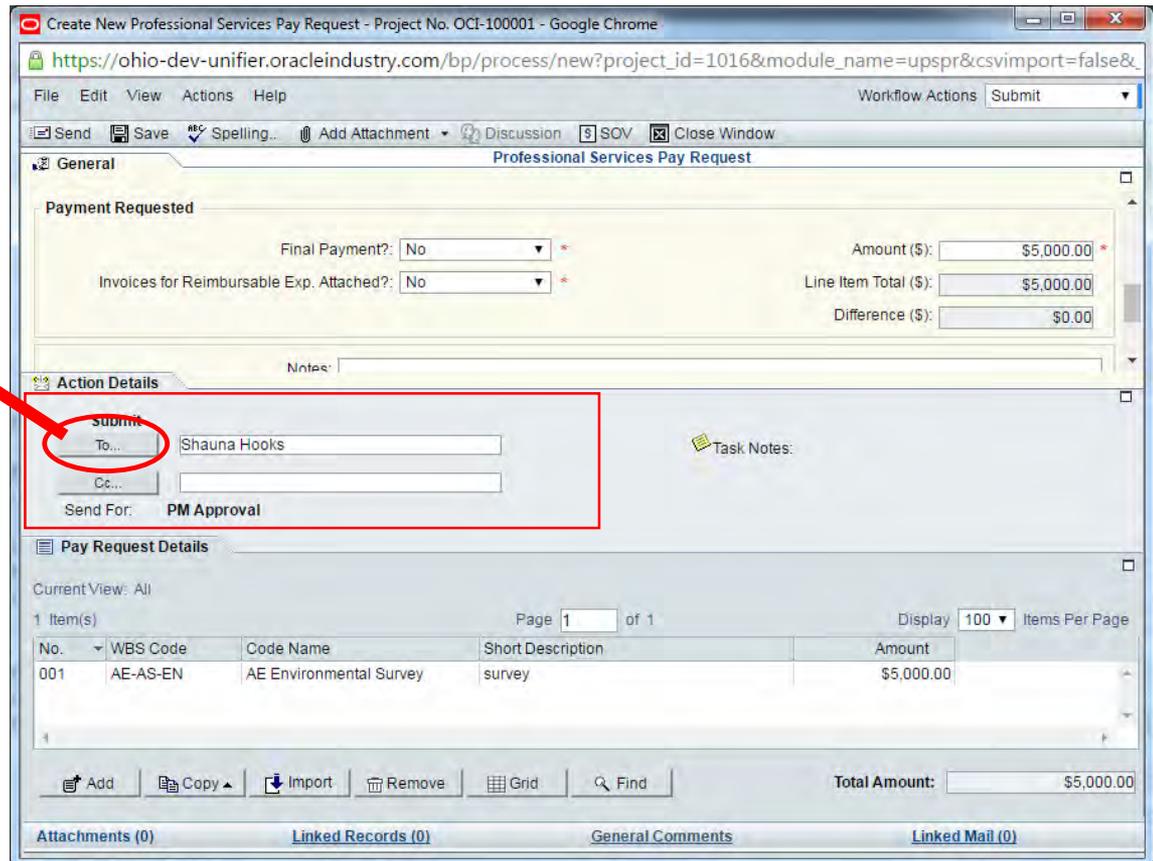
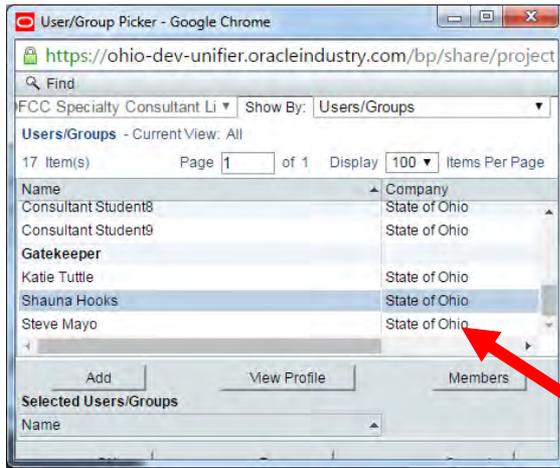
Total Amount: \$5,000.00

Add Copy Import Remove Grid Find

Attachments (0) [Linked Records \(0\)](#) [General Comments](#) [Linked Mail \(0\)](#)

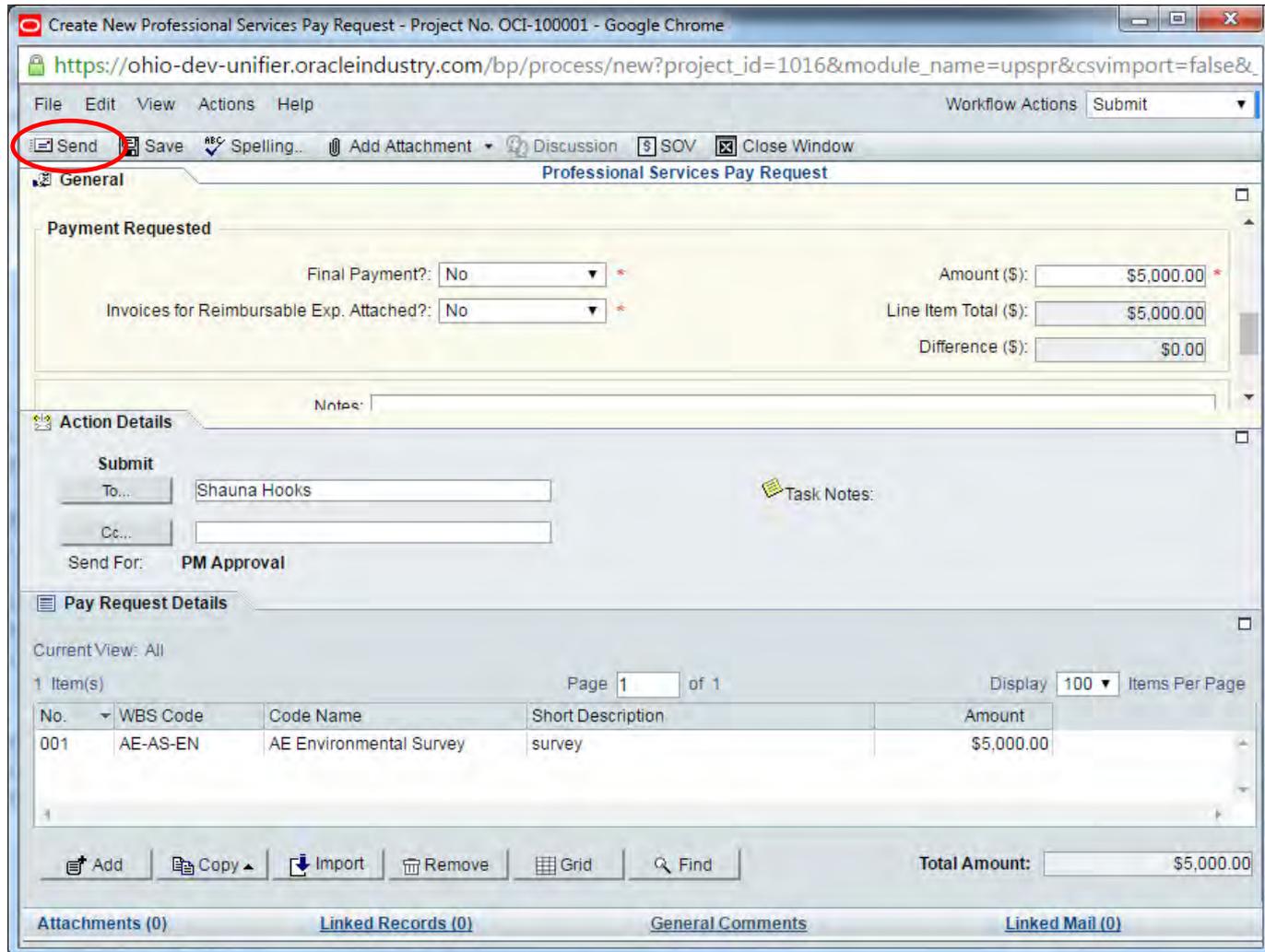
Submit Record

- ▶ You must now choose the PM to send the record to
- ▶ Click the “To” button and choose the appropriate person
- ▶ The “To” box will populate with their name



Submit Record

- ▶ Click Send



Create New Professional Services Pay Request - Project No. OCI-100001 - Google Chrome

https://ohio-dev-unifier.oracleindustry.com/bp/process/new?project_id=1016&module_name=upspr&csvimport=false&

File Edit View Actions Help Workflow Actions Submit

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

Professional Services Pay Request

General

Payment Requested

Final Payment?: No * Amount (\$): \$5,000.00 *

Invoices for Reimbursable Exp. Attached?: No * Line Item Total (\$): \$5,000.00

Difference (\$): \$0.00

Notes:

Action Details

Submit

To... Shauna Hooks

Cc...

Send For: PM Approval

Task Notes:

Pay Request Details

Current View: All

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

No.	WBS Code	Code Name	Short Description	Amount
001	AE-AS-EN	AE Environmental Survey	survey	\$5,000.00

Total Amount: \$5,000.00

Add Copy Import Remove Grid Find

Attachments (0) [Linked Records \(0\)](#) [General Comments](#) [Linked Mail \(0\)](#)

What if I want to know the status of my Record?



Finding the Record Status

- ▶ Navigate to Logs, choose Record type, view Status column
- ▶ For more detail, double-click the record to open

The screenshot displays the Oracle Primavera Unifier web application. The top navigation bar includes the Oracle logo, the text 'PRIMAVERA Unifier', and the user name 'Katie Tuttle'. Below this, there are tabs for 'Home', 'Agency General...', 'Campus Resear...', and 'Northcoast Beh...'. The main content area shows a table titled 'Change Order - Current View: All' with 13 items. The table has columns for CO No., CO Type, Contractor Name, Contract SOV, Title, Status, Total Amount, and Chan. The 'Status' column is highlighted with a red box, and a red arrow points to it from below. The 'Logs' menu item in the left sidebar is also circled in red, along with the 'Change Order' record type.

CO No.	CO Type	Contractor Name	Contract SOV	Title	Status	Total Amount	Chan
CO-18	Proposal Request	OCI Test General	OCI-090002-002	Test Proposal Request	Pending	\$5,000.00	
PR-001	Proposal Request	OCI Test General	OCI-090002-002	PR-001	Pending	\$0.00	
01	Request for Change Order	OCI Test General	001	Test Save	Pending	\$80,000.00	
001	Request for Change Order	OCI Test General	OCI-090002-002	Testing	Approved	(\$6,000.00)	GM
1	Request for Change Order	OCI Test General	OCI-090002-002	Test 9/13/2013	Approved	(\$3,000.00)	Ov
1234	Change Directive	OCI Test General	OCI-090002-002	shauna test 3/2013	Pending	\$0.00	Ov
j	Request for Change Order	OCI Test General	OCI-090002-002	test	Pending	\$2,500.00	Ov
6	Request for Change Order	OCI Test General	OCI-090002-002	Show Em	Terminated	(\$1,200.00)	Ov
5		OCI Test General	OCI-090002-002	Fix SOV Items Under Water	Approved	\$2,000.00	Otl
3		OCI Test General	OCI-090002-002	Test for Validation	Approved	(\$4,500.00)	En
123		OCI Test General	OCI-090002-002	CO 1	Pending	\$1,000.00	En
1	Proposal Request	OCI Test General	OCI-090002-002	test	Accepted	\$100.00	
	Proposal Request	OCI Test General	OCI-090002-002	SAO College CO 1	Pending	\$0.00	

Finding the Record Status

- ▶ Review Task Details
- ▶ Click Workflow Progress link to view status of the record

The screenshot displays the Oracle Change Order interface. The browser title is "Change Order - Test Proposal Request - Project No. OCI-080001 - Google Chrome". The URL is https://ohio-unifier.oracleindustry.com/bp/studio/bp/log/open?srcid=13565&model=uco&fromcostlog=1&project_id=1. The page has a menu bar with "File", "Edit", "View", "Actions", and "Help". Below the menu bar are buttons for "Accept Task", "Decline Task", "SOV", and "Close Window".

The main content area is titled "Change Order" and is divided into several sections:

- General**: Contains fields for Organization (Department of Administrative Services), Project Number (OCI-080001), Project Name (Agency General Projects Test), Project Location (OAKS, CI Administration), Record Number (CO-0013), Creator (Katie Tuttle), Creation Date (05/16/2016 11:53 AM (UTC-5)), and Status (Pending).
- Task Details**: A red box highlights this section, which includes:
 - From: Katie Tuttle;
 - To: Project Manager:Katie Tuttle; [More...](#)
 - Cc:
 - Sent For: PM Review
 - Task Due Date:
 - Task Status: [Not Started](#)
- Task Notes (0)**: A red circle and arrow point to the [Workflow Progress](#) link.
- Line Item List**: Shows a table with 2 items. The current view is "All". The currency is set to "Transaction Currency". The page is 1 of 1, displaying 100 items per page.

No.	Reference	WBS Code	Code Name	Short Description	Amount	Subcontr
002	0	CE-FC-03L	Concrete Labr	Concrete Labor	\$2,500.00	Bobs
001	2	CE-FC-03L	Concrete Labr	labor -concrete	\$2,500.00	Bobs

At the bottom of the page, there is a "Total Amount:" field showing \$5,000.00. Navigation buttons for "Grid" and "Find" are also present. At the very bottom, there are links for "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

Finding the Record Status

The screenshot displays a web browser window titled "Workflow Progress - Google Chrome" with the URL https://ohio-unifier.oracleindustry.com/bp/studio/workflow/show/progress?processid=104317&selected_node_id=810967&_uref=uuu736:n. The page shows the "Workflow Progress" for a "Test Proposal Request" with Record No. CO-0013. The workflow steps are listed in a table below.

Step Name	Assignee	Company	Status	Action	Completion Date
Creation	Katie Tuttle	State of Ohio	Completed	Submit	05/16/2016 11:53 AM (UTC-5)
Proposal Creation	Katie Tuttle	State of Ohio	Completed	Submit	05/16/2016 12:29 PM (UTC-5)
AE Review	Katie Tuttle	State of Ohio	Completed	Accept	06/19/2016 03:50 PM (UTC-5)
Proposal Update					
PM Review	Katie Tuttle	State of Ohio	Not Started		
PM Review	Moenique Morris	State of Ohio	Not Started		
PM Review	Sara Freetage	State of Ohio	Not Started		
PM Review	Shauna Hooks	State of Ohio	Not Started		
PM Review	Rita Nichols	State of Ohio	Not Started		
PM Review	Steve Mayo	State of Ohio	Not Started		
CO Validation and DocuSign Process Wait					
End					

Below the table is a flowchart diagram illustrating the workflow process. The steps are: Proposal Creation, AE Review, PM Review, Proposal Update, and CO Validation and DocuSign. The flow starts with Proposal Creation, leading to AE Review. From AE Review, the process can go to PM Review (if "Accept" is chosen) or back to AE Review (if "Return for Clarification" is chosen). From PM Review, the process can go to Proposal Update (if "Accept" is chosen) or back to PM Review (if "Return for Clarification" is chosen). From Proposal Update, the process can go to CO Validation and DocuSign (if "Accept" is chosen) or back to Proposal Update (if "Return for Clarification" is chosen). The flowchart also shows a "Return for Clarification" path from CO Validation and DocuSign back to PM Review. The diagram includes "Print Graphic" and "Close" buttons at the bottom.

Two red callout boxes with arrows point to the table and the flowchart:

- View the workflow of the Record from Creation to End
- Diagram view of the workflow

Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211