OAKS
Capital Improvements

Professional Services Amendments

OFCC
OHIO FACILITIES CONSTRUCTION COMMISSION

Purpose

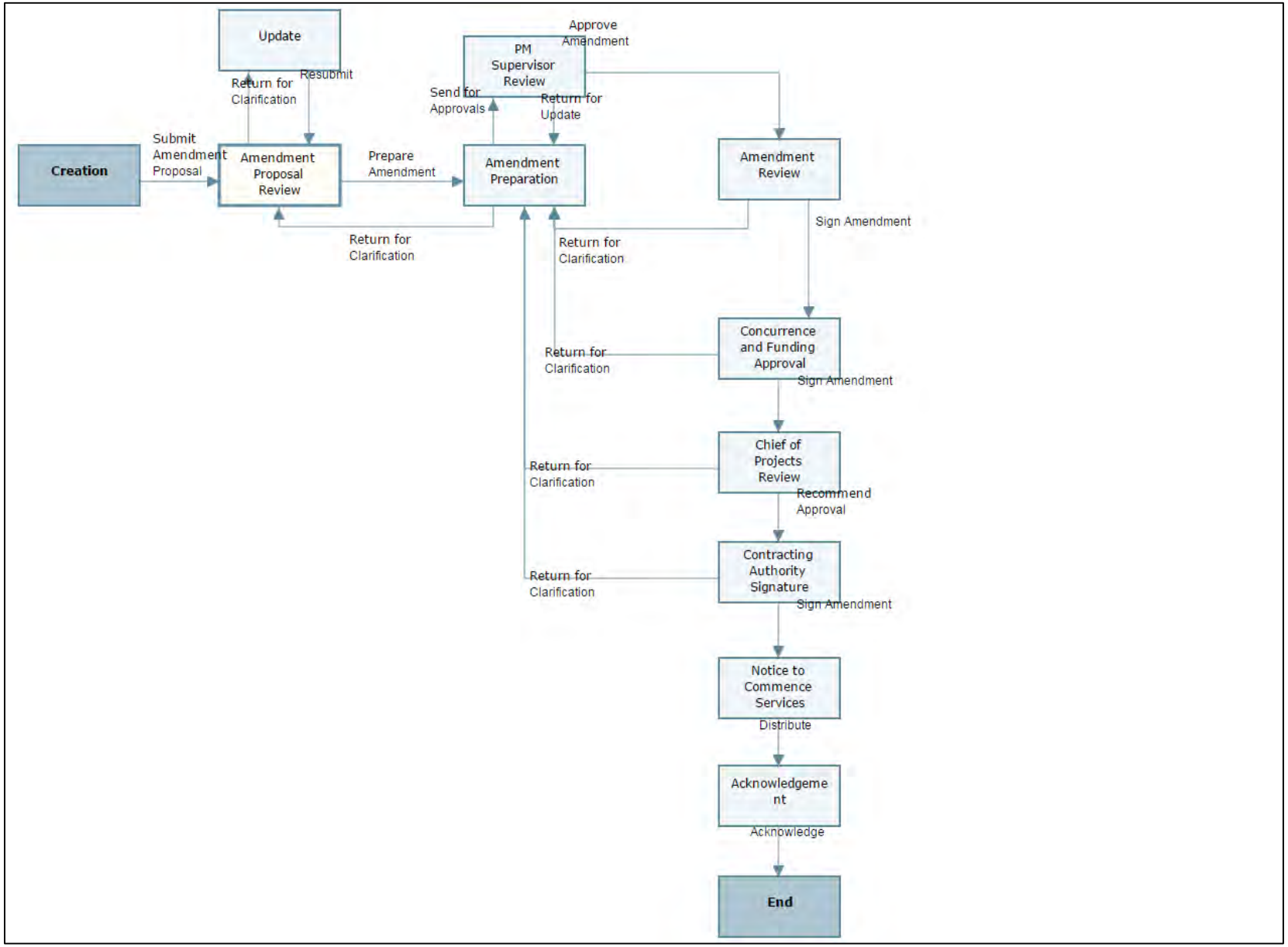
- Revisions to the scope of work of an Professional Services Provider require written authorization from the Contracting Authority

- 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

- 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


Update
Approve Amendment
PM Supervisor Review
Resubmit
Return for Clarification
Send for Approvals
Return for Update
Submit Amendment Proposal
Creation
Amendment Proposal Review
Prepare Amendment
Amendment Preparation
Amendment Review
Sign Amendment
Return for Clarification
Return for Clarification
Concurrence and Funding Approval
Return for Clarification
Sign Amendment
Chief of Projects Review
Return for Clarification
Recommend Approval
Contracting Authority Signature
Return for Clarification
Sign Amendment
Notice to Commence Services
Distribute
Acknowledgement
Acknowledge
End

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

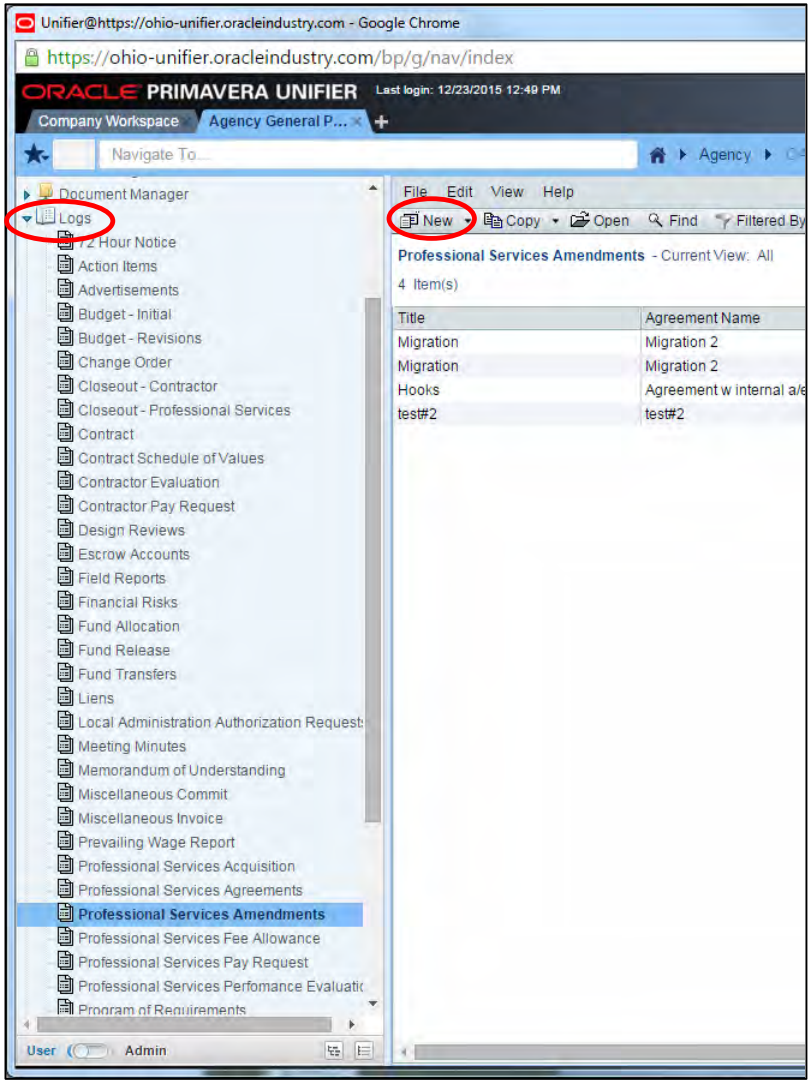
- Project Coordinator
  - Prepares the Amendment document and supporting documentation seeking the release and certification of funding by the Owner
  - Coordinates distribution of the various documents throughout the process

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

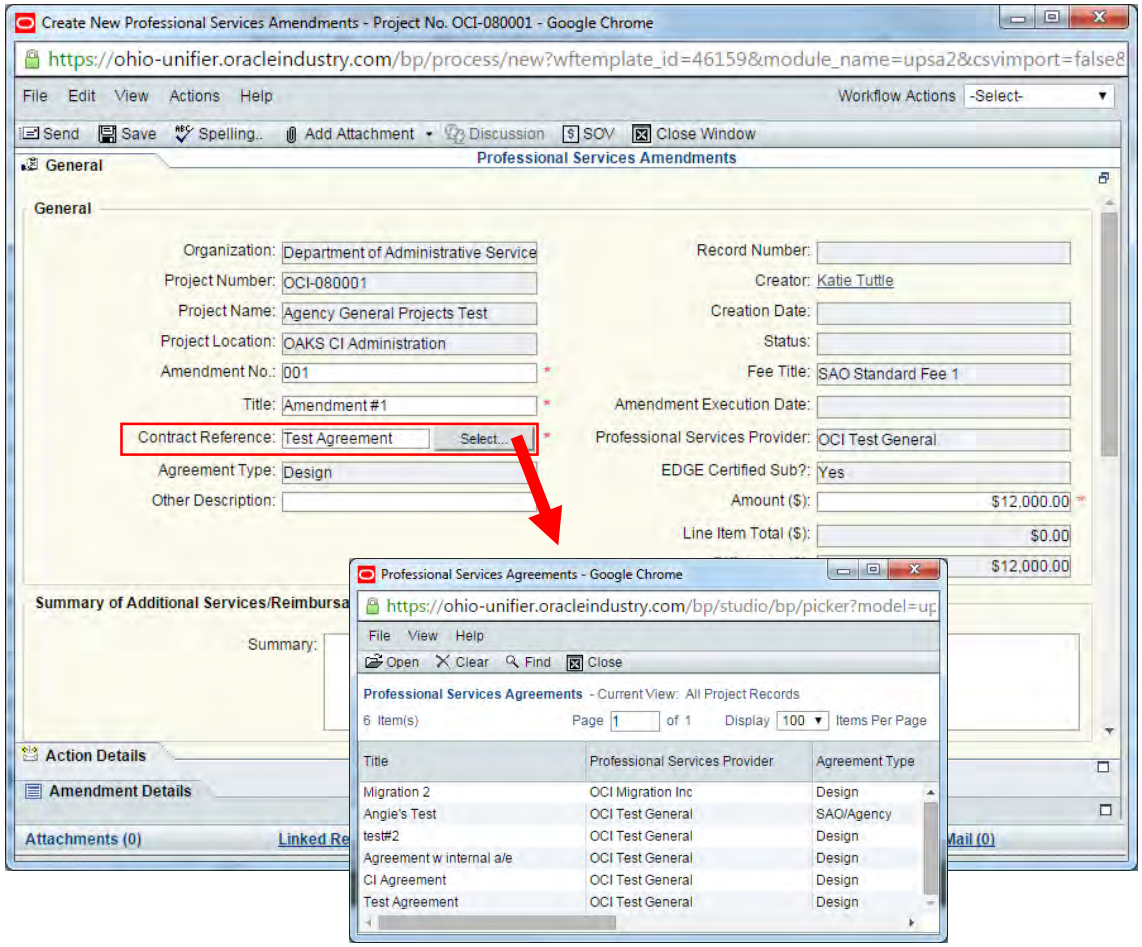
Create a Professional Services Amendment

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



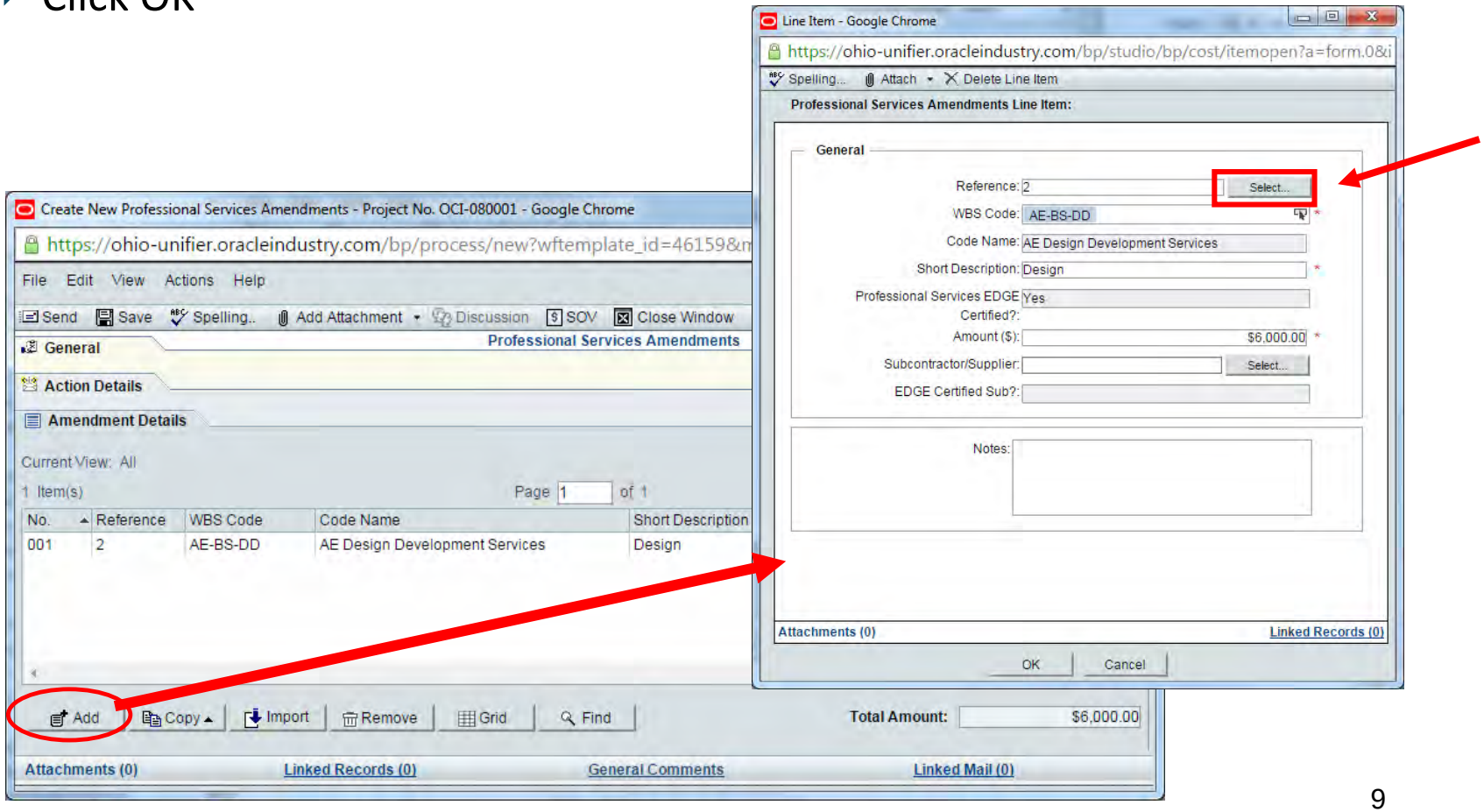
Form Completion

- 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



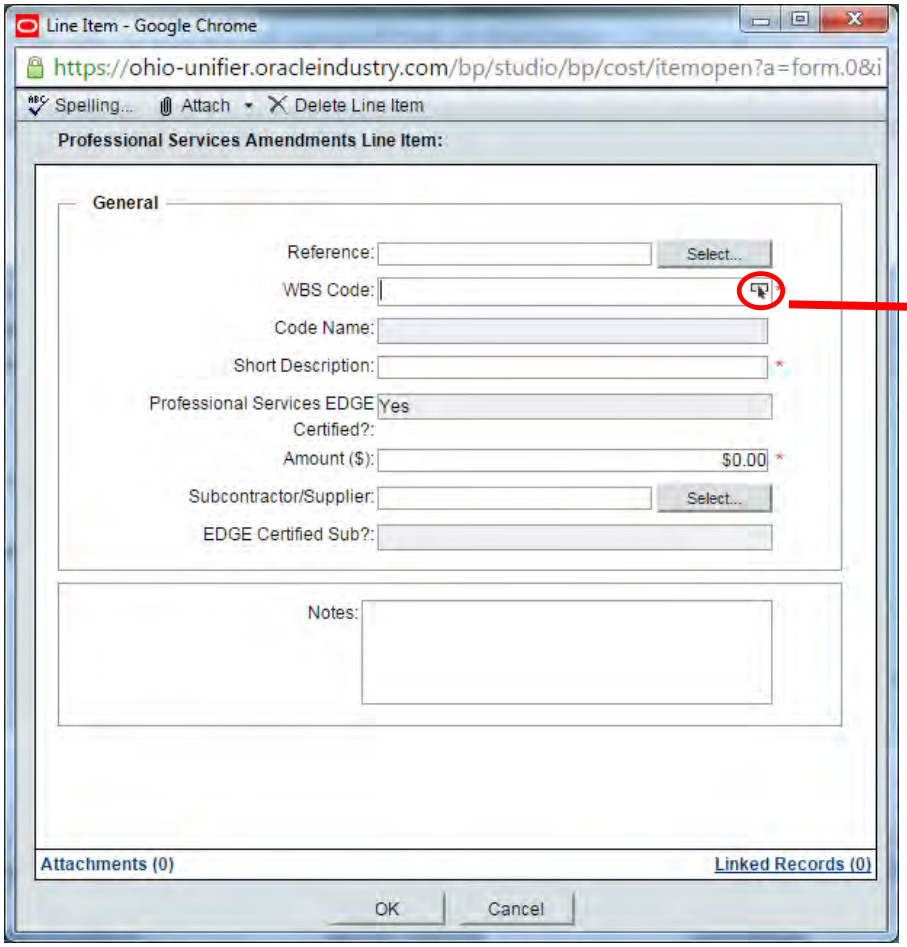
Add Line Items

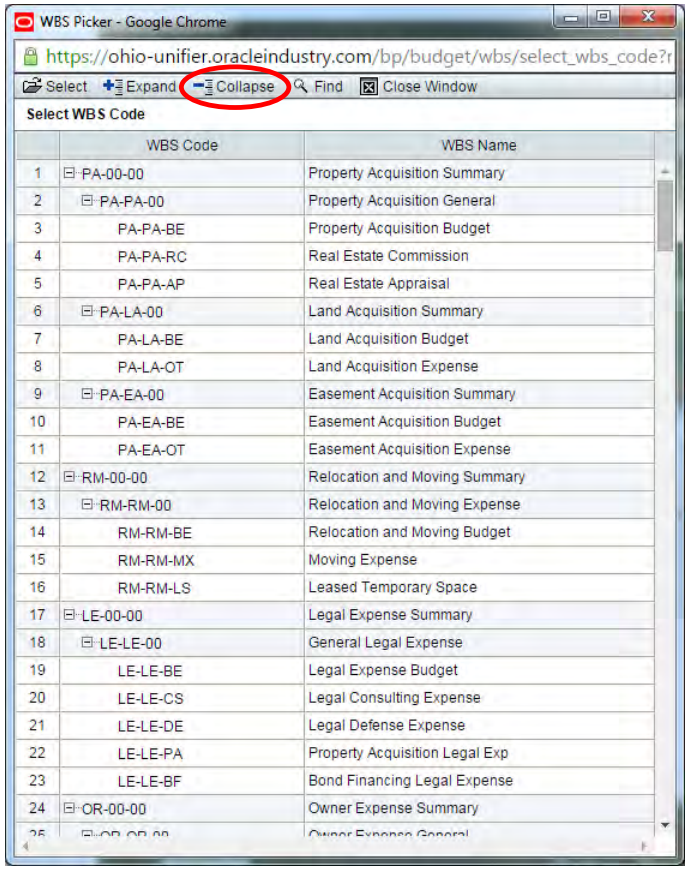
- To add Line Items click Add
- If you are referencing a current line in your agreement click the select button next to Reference.
- Fill out the information marked with a red *
- Click OK



WBS Codes

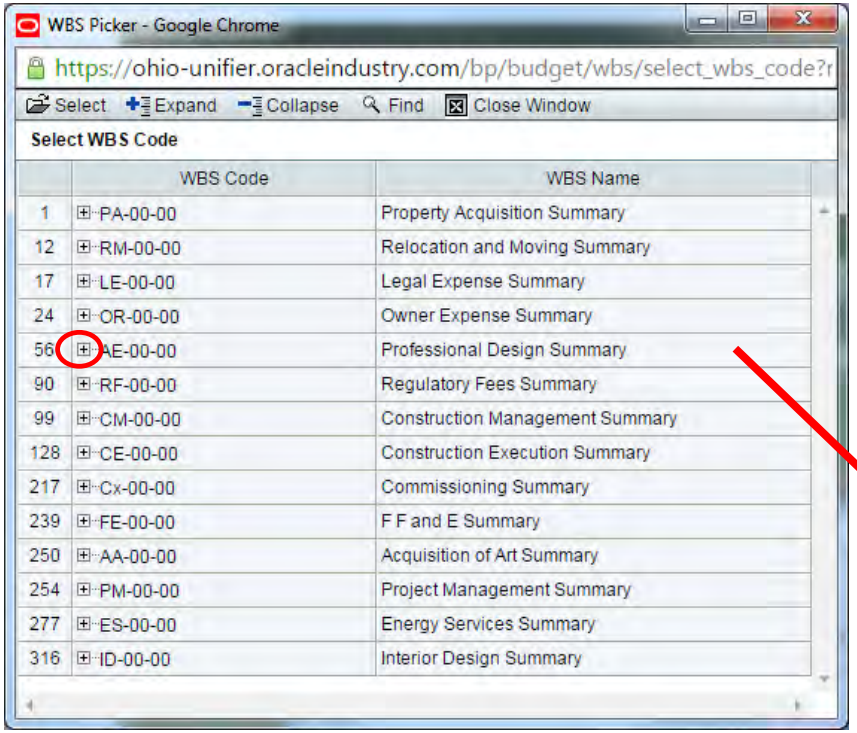
- To Add a New Line, click the arrow next to WBS Code
- Click Collapse



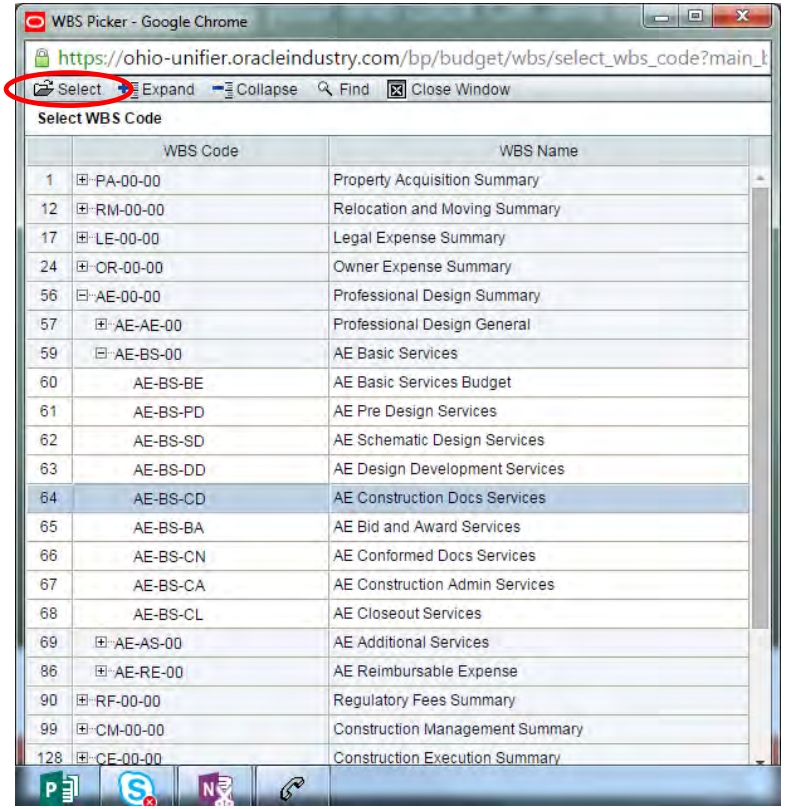


WBS Codes

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



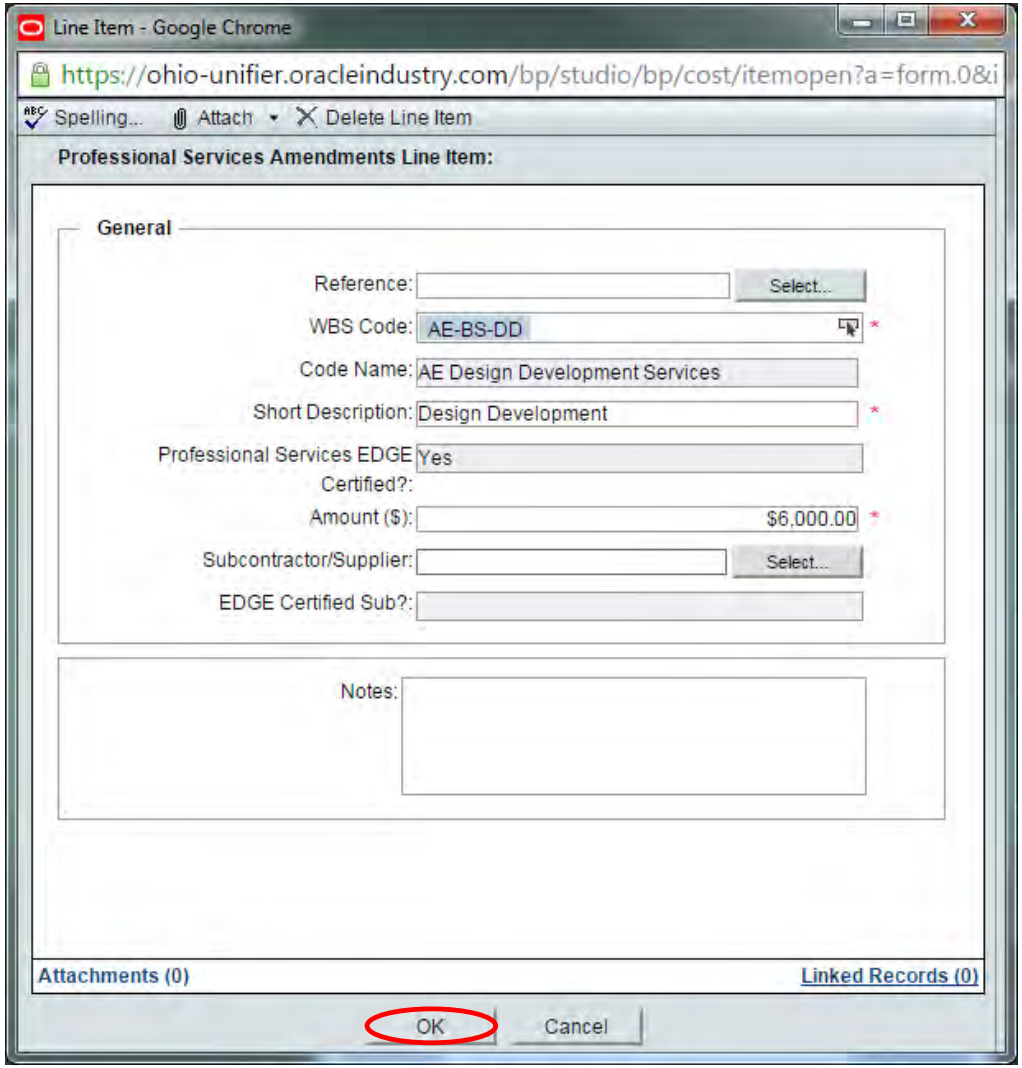
	WBS Code	WBS Name
1	PA-00-00	Property Acquisition Summary
12	RM-00-00	Relocation and Moving Summary
17	LE-00-00	Legal Expense Summary
24	OR-00-00	Owner Expense Summary
56	AE-00-00	Professional Design Summary
90	RF-00-00	Regulatory Fees Summary
99	CM-00-00	Construction Management Summary
128	CE-00-00	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

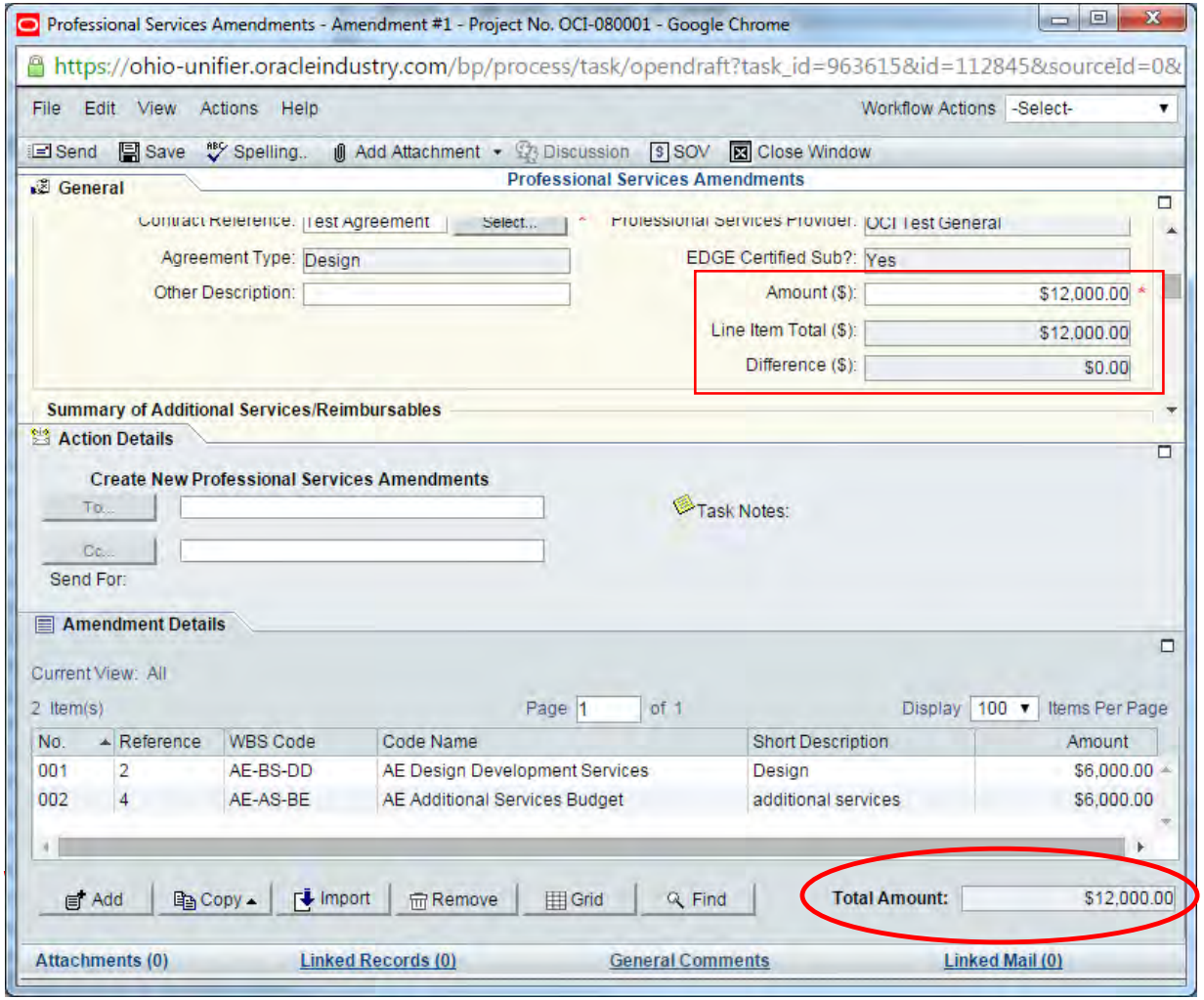
Add Line Items

- Fill in the Remaining required fields
- Click OK



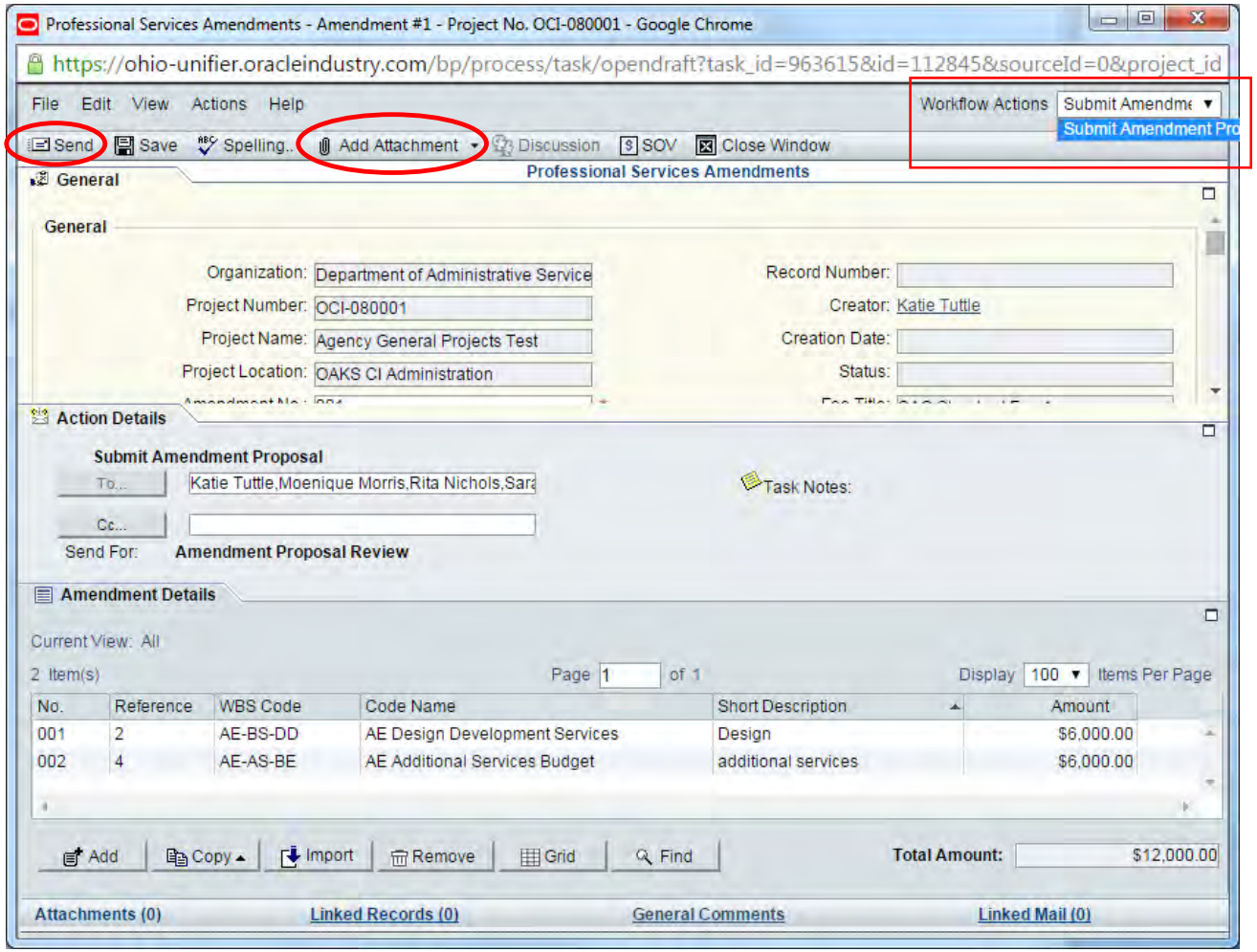
Add Line Items

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



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



Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211