

# OAKS CI Professional Service Contract Process

PM  
Negotiates contract with provider, submits information to PC

## Step 1 Contract Initiation

- Contract Initiated in OAKS CI by Project Coordinator, *custom print* is created and attached to the contract record
- Submit to **PM**
- **Only one line should be added to lower form-SOV Pending**

## Step 2 PM Review

- Technical Proposal Review- by PM
- Review Contract and attached proposal
- Submit to **PM Supervisor** for Review

## Step 3 PM Supervisor Review

PM Sup. Review contract  
Submit to **Vendor** (professional service provider) for signature

## Step 4 Vendor Signature (professional service provider)

- **Vendor** prints and signs attached Contract, uploads to Document manager and attaches to record.
- Submit to **School District**

## Step 5

### • School District Treasurer

- Prints and signs attached contract (also gets superintendent signature) uploads to document manager and attaches to contract record

## Step 5b

### • School District Treasurer (same step)

- Add Board Resolution number and date to Contract Record
- Instruct Owner Financial to create a Purchase Order in District Financial System of Record
- Owner Financial -Record PO in OAKS CI
- Attach PO Contract Record in OAKS CI
- Submit to District Superintendent

## Step 6

- District Superintendent
- Review Contract submit to OFCC Director automatic cc to Chief of Projects

## Step 7

- OFCC Director
  - Sign and Approves Contract
  - Submit to PC for Notice to Commence

## Step 8

- Project Coordinator
- Create the “Issue Notice to Commence Services, currently created outside of OAKS due to no custom print available, attach to Contract record in OAKS CI
- Submit to **Professional Service Provider**

## Step 9

- Vendor
- Acknowledge Notice to Commence in OAKS CI
- Submit to **Project Manager**

## Step 10

- Project Manager
- Receives Contract for SOV Verification holds for SOV approval

## Step 11— Subcontractor/ Supplier Declaration

- Professional Service Provider creates a Subcontractor Supplier declaration for any Consultant and /or Edge Providers , submits to for review to the **Project Manager** it will then go to the **Project Coordinator**

- Once the Edge providers Subcontractor /Supplier declaration has been approved the SOV spreadsheet can be imported into OAKS CI

# Contract SOV

## Step 1

- OA, AE ,CX or PC completes excel spreadsheet
- PC ,OA, AE or CX imports spreadsheet into SOV record
- If PC Imports the spreadsheet into OAKS CI, they will submit SOV record to **Vendor** for review
- **ENSURE EDGE AND LFI ARE IDENTIFIED APPROPRIATLY**

## Step 2

- Vendor review SOV
- Submit to **Project Manager**

## Step 3

- Project Manager
- Review and Approve Contract SOV record
- Once approved- **Go back to Contract move to end step**

Step

Step

24

## Sample –SOV Templates

		<b>Commissioning Agent</b>				<b>EDGE Certified Prime Contract</b>		
WBS Cod	WBS Code	Code Description	Short Description	Amount (\$)	LFI Peor?			
				<b>\$67,000.00</b>				
Cx-00-00~	Cx-BS-00	Cx Basic Services						
Cx-00-00~	Cx-BS-PV	Cx Program Verification Services						Building Fee
Cx-00-00~	Cx-BS-SD	Cx Schematic Design Services	<Building Name> Schematic	\$4,020.00	5	6	#####	
Cx-00-00~	Cx-BS-SD	Cx Schematic Design Services	<Building Name> Eco Charrette	\$1,340.00	5	2		
Cx-00-00~	Cx-BS-DD	Cx Design Development Services	<Building Name> Design Drawing	\$4,020.00	5	6		
Cx-00-00~	Cx-BS-DD	Cx Design Development Services	<Building Name> Owners Design Inter	\$670.00	5	1		
Cx-00-00~	Cx-BS-DD	Cx Design Development Services	<Building Name> A/E Basis of Design	\$670.00	5	1		
Cx-00-00~	Cx-BS-DD	Cx Design Development Services	<Building Name> Energy Modeling Re	\$1,340.00	5	2		
Cx-00-00~	Cx-BS-CD	Cx Construction Docs Services	<Building Name> Construction Drawin	\$3,350.00	5	5		
Cx-00-00~	Cx-BS-CD	Cx Construction Docs Services	<Building Name> Cx Plan	\$670.00	5	1		
Cx-00-00~	Cx-BS-CD	Cx Construction Docs Services	<Building Name> LEED Documentatio	\$1,340.00	5	2		
Cx-00-00~	Cx-BS-BA	Cx Bid and Award Services						

# Commissioning Agent-- Sample

Final Four Seasons-CXA SOV 07 08 14.xlsx [Read-Only] - Microsoft Excel

File Home Insert Page Layout Formulas Data Review View Acrobat

Clipboard Font Alignment Number Styles Cells Editing WebEx

H1

1 Import Business Process Records Prepare interface file

2 Note: Do not change column structure. To add new lines, copy and paste the ENTIRE line to be repeated.

WBS Code	Code Description	Short Description	Amount (\$)	Subcontractor/Supplier	LFI Percent	EDGE Certified	Prime Contractor?	Notes
			\$142,352.00					
9	Cx-BS-PV	Cx Program Verification Services						Building Fee
10	Cx-BS-SD	Cx Schematic Design Services	\$7,336.44		0			\$142,352.00
11	Cx-BS-SD	Cx Schematic Design Services	\$1,204.68		100			
12	Cx-BS-SD	Cx Schematic Design Services	\$2,445.48		0			
13	Cx-BS-SD	Cx Schematic Design Services	\$401.56		100			
14	Cx-BS-DD	Cx Design Development Services	\$3,454.11		0			
15	Cx-BS-DD	Cx Design Development Services	\$3,882.33	Metro CD	0			
16	Cx-BS-DD	Cx Design Development Services	\$1,204.68		100			
17	Cx-BS-DD	Cx Design Development Services	\$1,222.74		0			
18	Cx-BS-DD	Cx Design Development Services	\$200.78		100			
19	Cx-BS-DD	Cx Design Development Services	\$1,222.74		0			
20	Cx-BS-DD	Cx Design Development Services	\$200.78		100			
21	Cx-BS-DD	Cx Design Development Services	\$2,445.48		0			
22	Cx-BS-DD	Cx Design Development Services	\$401.56		100			
23	Cx-BS-CD	Cx Construction Docs Services	\$2,878.43		0			
24	Cx-BS-CD	Cx Construction Docs Services	\$3,235.27	Metro CD	0			
25	Cx-BS-CD	Cx Construction Docs Services	\$1,003.90		100			
26	Cx-BS-CD	Cx Construction Docs Services	\$1,222.74		0			
27	Cx-BS-CD	Cx Construction Docs Services	\$200.78		100			
28	Cx-BS-CD	Cx Construction Docs Services	\$2,445.48		0			
29	Cx-BS-CD	Cx Construction Docs Services	\$401.56		100			
30	Cx-BS-CA	Cx Construction Admin Services	\$18,341.10		0			
31	Cx-BS-CA	Cx Construction Admin Services	\$3,011.70		100			
32	Cx-BS-CA	Cx Construction Admin Services	\$30,568.50		0			
33	Cx-BS-CA	Cx Construction Admin Services	\$5,019.50		100			
34	Cx-BS-CA	Cx Construction Admin Services	\$6,113.70		0			
35	Cx-BS-CA	Cx Construction Admin Services	\$1,003.90		100			
36	Cx-BS-CA	Cx Construction Admin Services	\$6,113.70		0			
37	Cx-BS-CA	Cx Construction Admin Services	\$1,003.90		100			

Ready

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# Owner Agent--Sample

WBS Code	Code Description	Short Description	Amount (\$)	Subcontractor/Supplier	LFI Percent	EDGE Certified Prime Contractor?	Notes
			\$4,309,278.00				
CM-BS-00	CM Basic Services						
CM-BS-CA	CM Construction Admin Services	Harmon ES Precon & Cons Fee RCC	\$86,236.00				
CM-BS-CA	CM Construction Admin Services	Harmon ES Cons Fee - Edge	\$6,596.00	Sands Decker Engineering			
CM-BS-CA	CM Construction Admin Services	Alton Hall ES Precon & Con Fee RCC	\$86,238.00				
CM-BS-CA	CM Construction Admin Services	Alton Hall ES Con Fee - Edge	\$6,596.00	Sands Decker Engineering			
CM-BS-CA	CM Construction Admin Services	Buckeye Woods ES Precon & Cons Fee RCC	\$27,668.00				
CM-BS-CA	CM Construction Admin Services	Buckeye Woods ES Precon & Cons Fee Edge	\$2,497.00	Sands Decker Engineering			
CM-BS-CA	CM Construction Admin Services	Darby Woods ES Precon & Cons Fee RCC	\$25,532.00				
CM-BS-CA	CM Construction Admin Services	Darby Woods ES Precon & Cons Fee Edge	\$2,947.00	Sands Decker Engineering			
CM-BS-CA	CM Construction Admin Services	Darbydale ES Precon & Cons Fee RCC	\$66,789.00				
CM-BS-CA	CM Construction Admin Services	Darbydale ES Precon & Cons Fee Edge	\$2,420.00	Sands Decker Engineering			
CM-BS-CA	CM Construction Admin Services	Finland ES Precon & Cons Fee RCC	\$76,932.00				
CM-BS-CA	CM Construction Admin Services	Finland ES Precon & Cons Fee Edge	\$5,008.00	Sands Decker Engineering			
CM-BS-CA	CM Construction Admin Services	Highland ES Precon & Cons Fee RCC	\$79,075.00				
CM-BS-CA	CM Construction Admin Services	Highland ES Precon & Cons Fee Edge	\$2,066.00	Sands Decker Engineering			
CM-BS-CA	CM Construction Admin Services	JC Sommer ES Precon & Cons Fee RCC	\$87,021.00				
CM-BS-CA	CM Construction Admin Services	JC Sommer ES Precon & Cons Fee Edge	\$5,813.00	Sands Decker Engineering			
CM-BS-CA	CM Construction Admin Services	Monterey ES Precon & Cons Fee RCC	\$70,119.00				
CM-BS-CA	CM Construction Admin Services	Monterey ES Precon & Cons Fee Edge	\$5,822.00	Sands Decker Engineering			
CM-BS-CA	CM Construction Admin Services	Bolton Crossing ES Precon & Cons Fee RCC	\$79,033.00				
CM-BS-CA	CM Construction Admin Services	Bolton Crossing ES Precon & Cons Fee Edge	\$2,908.00	Sands Decker Engineering			
CM-BS-CA	CM Construction Admin Services	Franklin Heights HS Precon & Cons Fee RCC	\$213,790.00				
CM-BS-CA	CM Construction Admin Services	Franklin Heights HS Precon & Cons Fee Edge	\$16,961.00	Sands Decker Engineering			
CM-BS-CA	CM Construction Admin Services	Prairie Lincoln ES Precon & Cons Fee RCC	\$89,539.00				
CM-BS-CA	CM Construction Admin Services	Prairie Lincoln ES Precon & Cons Fee Edge	\$3,295.00	Sands Decker Engineering			
CM-BS-CA	CM Construction Admin Services	Prairie Norton ES Precon & Cons Fee RCC	\$86,238.00				

# Sample –SOV Templates

**A/E**

1	Import Business Process Records							
2	Note: Do not change column structure. To add new lines, copy and paste the ENTIRE line to be repeated.							
3								
4	<b>WBS Code</b>	<b>Code Description</b>	<b>Short Description</b>	<b>Amount (\$)</b>	<b>Subcontractor/Supplier</b>	<b>LFI Percent</b>	<b>EDGE Certified Prime Contractor?</b>	<b>Notes</b>
5				\$0.00				
6								
7	AE Basic Services							
8	AE-BS-OM	AE Organizational Meeting Fee						
9	AE-BS-DS	AE Design Criteria Stage						
10	AE-BS-BV	AE Best Value Selection Fee						
11	AE-BS-PV	AE Program Verification Services						
12	AE-BS-SD	AE Schematic Design Services						
13	AE-BS-DD	AE Design Development Services						
14	AE-SD-GA	AE GMP Negotiation Fee						
15	AE-BS-CD	AE Construction Docs Services						
16	AE-BS-BA	AE Bid and Award Services						
17	AE-BS-CN	AE Conformed Docs Services						
18	AE-BS-CA	AE Construction Admin Services						
19	AE-BS-CL	AE Closeout Services						
20	AE Additional Services							
21	AE-AS-BC	AE Basic Commissioning						
22	AE-AS-TI	AE Tests and Inspections						
23	AE-AS-LD	AE LEED Documentation Services						
24	AE-AS-CH	AE Charrette Facilitation						
25	AE-AS-EF	AE Eco Charrette Facilitation						
26	AE-AS-PF	AE Partnering Facilitation						
27	AE-AS-SU	AE Site Surveying Services						
28	AE-AS-GT	AE Geotechnical Investigation						
29	AE-AS-EN	AE Environmental Survey						
30	AE-AS-HM	AE Hazardous Materials Survey						

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# A/E- SOV Sample

WBS Code	WBS Code	Code Description	Short Description	Amount (\$)	Subcontractor/Suppl LFI Percent	EDGE Certified	Prime Contractor	Notes
Import Business Process Records								
Note: Do not change column structure. To add new lines, copy and paste the ENTIRE line to be repeated.								
Access Admin Page				Propose into excel file				
Total Amount: \$2,225,609.55								
<b>AE-00-00-AE-BS-00 AE Basic Services</b>								
AE-00-00-AE-BS-00-AE-BS-OM	AE-BS-OM	AE Organizational Meeting Fee	Organizational Meeting - Boyd E. Smith ES	\$16,930.80				
AE-00-00-AE-BS-00-AE-BS-PY	AE-BS-PY	AE Program Verification Services	Programming - Boyd E. Smith ES	\$16,430.78				
AE-00-00-AE-BS-00-AE-BS-PY	AE-BS-PY	AE Program Verification Services	Programming - Boyd E. Smith ES	\$1,625.00	Dynamic Engineering Ltd			
AE-00-00-AE-BS-00-AE-BS-PY	AE-BS-PY	AE Program Verification Services	Programming - Boyd E. Smith ES	\$3,025.00	GOP LTD			
AE-00-00-AE-BS-00-AE-BS-SD	AE-BS-ID	AE Schematic Design Services	Schematic Design - Boyd E. Smith ES	\$38,459.66				
AE-00-00-AE-BS-00-AE-BS-SD	AE-BS-ID	AE Schematic Design Services	Schematic Design - Boyd E. Smith ES	\$6,500.00	Dynamic Engineering Ltd			
AE-00-00-AE-BS-00-AE-BS-SD	AE-BS-ID	AE Schematic Design Services	Schematic Design - Boyd E. Smith ES	\$9,075.00	GOP LTD			
AE-00-00-AE-BS-00-AE-BS-DO	AE-BS-DO	AE Design Development Services	Design Development - Boyd E. Smith ES	\$38,459.66				
AE-00-00-AE-BS-00-AE-BS-DO	AE-BS-DO	AE Design Development Services	Design Development - Boyd E. Smith ES	\$6,500.00	Dynamic Engineering Ltd			
AE-00-00-AE-BS-00-AE-BS-DO	AE-BS-DO	AE Design Development Services	Design Development - Boyd E. Smith ES	\$9,075.00	GOP LTD			
AE-00-00-AE-BS-00-AE-BS-GA	AE-ID-GA	AE GMP Negotiation Fee	GMP/Negotiation - Boyd E. Smith ES	\$46,231.17				
AE-00-00-AE-BS-00-AE-BS-GA	AE-ID-GA	AE GMP Negotiation Fee	GMP/Negotiation - Boyd E. Smith ES	\$1,625.00	Dynamic Engineering Ltd			
AE-00-00-AE-BS-00-AE-BS-GA	AE-ID-GA	AE GMP Negotiation Fee	GMP/Negotiation - Boyd E. Smith ES	\$1,210.00	GOP LTD			
AE-00-00-AE-BS-00-AE-BS-CD	AE-BS-CD	AE Construction Docu Services	Construction Documents - Boyd E. Smith ES	\$201,734.33				
AE-00-00-AE-BS-00-AE-BS-CD	AE-BS-CD	AE Construction Docu Services	Construction Documents - Boyd E. Smith ES	\$8,125.00	Dynamic Engineering Ltd			
AE-00-00-AE-BS-00-AE-BS-CD	AE-BS-CD	AE Construction Docu Services	Construction Documents - Boyd E. Smith ES	\$16,150.00	GOP LTD			
AE-00-00-AE-BS-00-AE-BS-CA	AE-BS-CA	AE Construction Admin Services	Construction Admin - Boyd E. Smith ES	\$169,557.77				
AE-00-00-AE-BS-00-AE-BS-CA	AE-BS-CA	AE Construction Admin Services	Construction Admin - Boyd E. Smith ES	\$6,500.00	Dynamic Engineering Ltd			
AE-00-00-AE-BS-00-AE-BS-CA	AE-BS-CA	AE Construction Admin Services	Construction Admin - Boyd E. Smith ES	\$16,150.00	GOP LTD			
AE-00-00-AE-BS-00-AE-BS-CL	AE-BS-CL	AE Closeout Services	Closeout - Boyd E. Smith ES	\$19,366.33				
AE-00-00-AE-BS-00-AE-BS-CL	AE-BS-CL	AE Closeout Services	Closeout - Boyd E. Smith ES	\$1,625.00	Dynamic Engineering Ltd			
AE-00-00-AE-BS-00-AE-BS-CL	AE-BS-CL	AE Closeout Services	Closeout - Boyd E. Smith ES	\$1,815.00	GOP LTD			
<b>AE-00-00-AE-AS-00 AE Additional Services</b>								
AE-00-00-AE-AS-00-AE-AS-TI	AE-AS-TI	AE Tests and Inspections	Construction Testing - Boyd E. Smith ES	\$88,644.06				
AE-00-00-AE-AS-00-AE-AS-SU	AE-AS-SU	AE Site Surveying Services	Topographic Site Survey - Boyd E. Smith ES	\$11,898.31				
AE-00-00-AE-AS-00-AE-AS-GT	AE-AS-GT	AE Geotechnical Investigation	Final Geotech Testing - Boyd E. Smith ES	\$11,000.00				
AE-00-00-AE-AS-00-AE-AS-EN	AE-AS-EN	AE Environmental Survey	PHI Environ Site Assess - Boyd E. Smith ES	\$2,000.00	MacParan			
AE-00-00-AE-AS-00-AE-AS-OT	AE-AS-OT	AE Other Additional Services	Other Additional Services - Boyd E. Smith ES	\$148,619.10		17%		\$4000 Contingent LFI for TIS
<b>AE-00-00-AE-RE-00 AE Reimbursable Expense</b>								
AE-00-00-AE-RE-00-AE-RE-OP	AE-RE-OP	AE Document Printing	A&E Review Doc Printing - Boyd E. Smith ES	\$19,286.55				
AE-00-00-AE-RE-00-AE-RE-OT	AE-RE-OT	AE Other Reimbursable Expense	Other Reimbursable Expense - Boyd E. Smith ES	\$35,108.50				
<b>AE-00-00-AE-BS-00 AE Basic Services</b>								
AE-00-00-AE-BS-00-AE-BS-OM	AE-BS-OM	AE Organizational Meeting Fee	Organizational Meeting - Charles L. Szepiel ES	\$16,930.81				
AE-00-00-AE-BS-00-AE-BS-PY	AE-BS-PY	AE Program Verification Services	Programming - Charles L. Szepiel ES	\$16,430.78				
AE-00-00-AE-BS-00-AE-BS-PY	AE-BS-PY	AE Program Verification Services	Programming - Charles L. Szepiel ES	\$1,625.00	Dynamic Engineering Ltd			
AE-00-00-AE-BS-00-AE-BS-PY	AE-BS-PY	AE Program Verification Services	Programming - Charles L. Szepiel ES	\$3,025.00	GOP LTD			
AE-00-00-AE-BS-00-AE-BS-SD	AE-BS-ID	AE Schematic Design Services	Schematic Design - Charles L. Szepiel ES	\$38,459.66				
AE-00-00-AE-BS-00-AE-BS-SD	AE-BS-ID	AE Schematic Design Services	Schematic Design - Charles L. Szepiel ES	\$6,500.00	Dynamic Engineering Ltd			
AE-00-00-AE-BS-00-AE-BS-SD	AE-BS-ID	AE Schematic Design Services	Schematic Design - Charles L. Szepiel ES	\$9,075.00	GOP LTD			
AE-00-00-AE-BS-00-AE-BS-DO	AE-BS-DO	AE Design Development Services	Design Development - Charles L. Szepiel ES	\$38,459.66				
AE-00-00-AE-BS-00-AE-BS-DO	AE-BS-DO	AE Design Development Services	Design Development - Charles L. Szepiel ES	\$6,500.00	Dynamic Engineering Ltd			

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# Sample –SOV Templates

## Sample of an imported A/E Contract SOV

Contract Schedule of Values - SOV Milford SHP AE - Project No. SFC-140343 - Windows Internet Explorer

File Edit View Actions Help

Save Spelling... Add Attachment SOV Cash Flow Close Window

**General** Contract Schedule of Values

General

Project Number: [Redacted] Record Number: SOV-001  
 Project Name: [Redacted] Creator: [Redacted]  
 Organization Name: [Redacted] Creation Date: 07/02/2014 09:18 AM Local (GMT-5)  
 Facility Name: [Redacted] Status: Approved  
 Title: SOV Milford SHP AE

**Task Details**

Record has been closed. [Click here](#) to view process details.

**Contracts SOV Details**

Current View: All Show Currency in: Transaction Currency

92 Item(s) Page 1 of 1 Display 100 items per page

o.	WBS Code	Code Name	Bre	Short Description	Amount (\$)	Subcontract Supplier	EDGE Certified?	LFI Percent
97	AE-BS-SD	AE Schematic Design Serv		Schematic Design - Charles L. Seipelt ES	1,022.00			0
90	AE-BS-PV	AE Program Verification Se		Programming - Charles L. Seipelt ES Dem	3,622.00			0
99	AE-BS-OM	AE Organizational Meeting		Organizational Mtg - Charles L. Seipelt ES	1,207.33			0
98	AE-RE-OT	AE Other Reimbursable Ex		Other Reimbursable Expense - Charles L.	35,108.54			0
97	AE-RE-DP	AE Document Printing		Add'l Review Doc Printing - Charles L. Seip	19,286.55			0
96	AE-AS-OT	AE Other Additional Service		Other Additional Services - Charles L. Seip	148,619.10			7.77
95	AE-AS-EN	AE Environmental Survey		PH 1 Environ Site Assess - Charles L. Seip	2,000.00	MacParan	Yes	0
94	AE-AS-GT	AE Geotechnical Investigati		Prel Geotech Testing - Charles L. Seipelt E	11,000.00			29.31

Grid Find Total Amount: \$ 2,225,609.55

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

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