



# DPE PS Pay Request

## Facility Assessors

# Purpose & Procedure

- ▶ Provides for the submission, review, and approval of interim or final payment requests for services completed by the facility assessor
- ▶ References and relates directly to the schedule of values (SOV) line item amounts as outlined in the Agreement

- ▶ Workflow

Created by: **Facility Assessor** → Submitted to: **RPC Approval** → Sent to: **Assessor Update (if necessary)** → Sent to: **OFCC Planner Approval** → Sent to: **OFCC Fiscal for Review** → Sent to: **OFCC for Payment Process**

# Creation Step

- ▶ Facility Assessor:
  - ▶ Creates the DPE PS 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](http://ofcc.ohio.gov), under **All Users**

# DPE PS Pay Request Creation

- ▶ In Oaks CI navigate to:
  - ▶ Logs -> DPE PS Pay Request
  - ▶ Click Create

The screenshot displays the Oracle Primavera Unifier (Development) interface. The top navigation bar includes the Oracle logo and the text 'PRIMAVERA Unifier (Development)'. Below this, there are tabs for 'Company Work...', 'Agency', and 'SAO Consul'. The main content area is titled 'DPE PS Pay Rec' and features a '+ Create' button circled in red. A sidebar menu on the left is open, showing a list of options: Information, Cost Manager, Data Manager, Document Manager, Logs, DPE PS Pay Request, Fund Allocation, Fund Release, Fund Transfers, Professional Services Agreements, Professional Services Amendments, Professional Services Pay Request, Purchase Orders, Vouchers, Work Assignments, and Reports. The 'Logs' option is circled in red, and a red arrow points from the text 'Logs -> DPE PS Pay Request' in the list to the 'Logs' option in the sidebar. The 'DPE PS Pay Request' option is highlighted in the sidebar. Below the sidebar, there is a table with columns for 'Title' and a 'Total: 10' indicator at the bottom right.

	Title
	Harrison Planr
	65% PR1
	Hooks Co. PR
	Hooks Co. PR
	Trotwood Mad
	Champion LSI
	Harrison Planr
	Harrison Planr
	Resource RPC
	Resource RPC

# Complete Form

▶ Enter the required \* fields

- a) Enter the **Title**
- b) Click **Select** button in Contract Reference field
- c) In the new window, choose appropriate contract
- d) Click **Select**
- e) Enter **Period From** and **Period To** dates

Create New DPE PS Pay Request - Project No. SFC-130888 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/udppr/1040/2252?\_uref=uuu860121972t10

### Create New DPE PS Pay Request

Send Save

General Pay Request Details

Attachments

General

Organization

Record Number

Project Number

SFC-130888

Creator

Matthew Weber

Project Name

OFCC Specialty Consultant List

Creation Date

Status

Project Location

OFCC

**a**

**Title \***

Trotwood Madison 65%

**b**

**Contract Reference \***

Harrison Planning Group - Fa...

Agreement Type

Other

Other Description

Internal Reference

Professional Services Provider

Harrison Planning Group

EDGE Certification

Received

Professional Services Agreements

Search | Find on Page

Title	Professional Services Provider	Agreement Type	Total Agreement Amount	CA Hours
Harrison Planning Group - F...	Harrison Planning Group	Other	100,000.00	
Resource International - RPC	Resource International, Inc.	Other	800,000.00	
Consultant Name-Project Num...	Amazing Architectural Inc.	Other	25,000.00	2

Total: 3

**c**

**d**

Cancel Select

**e**

**Period From \***

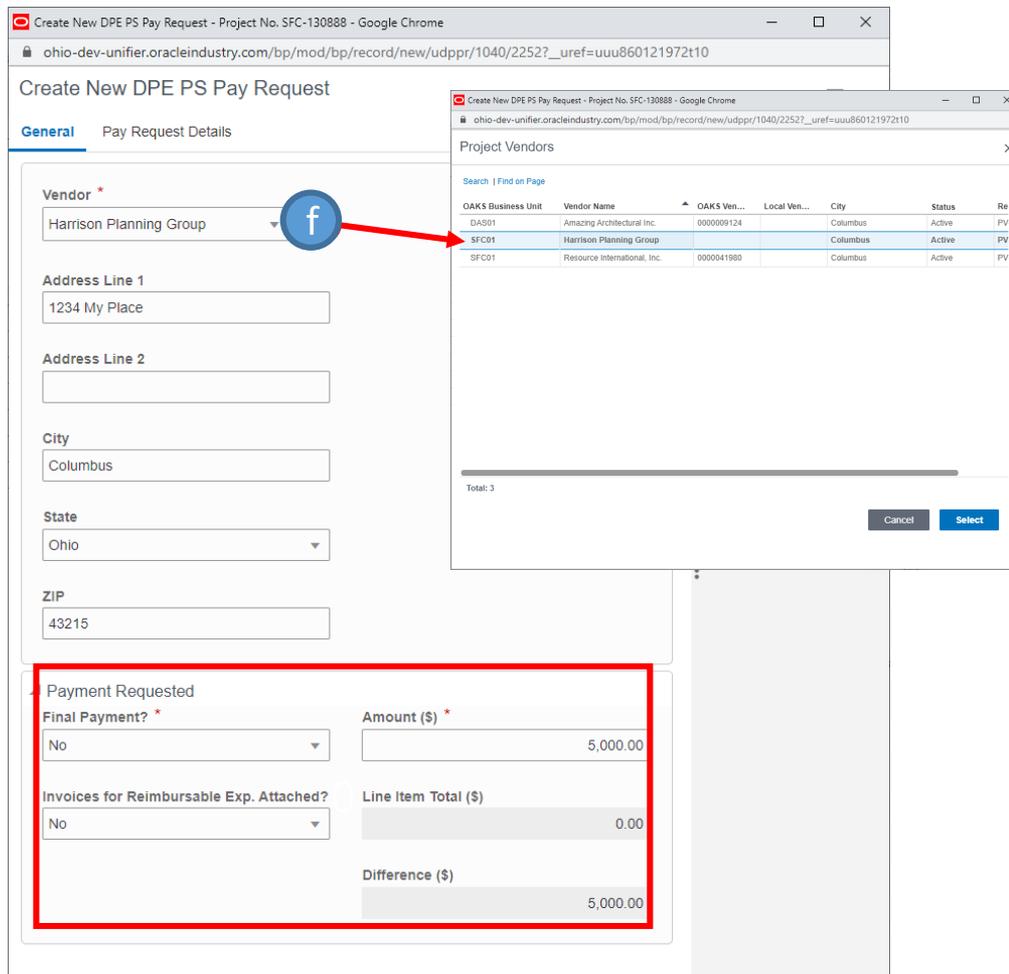
09/01/2020 05:00 PM (UTC-5)

**Period To \***

10/31/2020 05:00 PM (UTC-5)

# Complete Form

- ▶ Select the Vendor
- ▶ Complete the fields in the Payment Requested block



Create New DPE PS Pay Request - Project No. SFC-130888 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/udppr/1040/2252?\_\_uref=uuu860121972t10

### Create New DPE PS Pay Request

General Pay Request Details

**Vendor \***

Harrison Planning Group

**Address Line 1**

1234 My Place

**Address Line 2**

**City**

Columbus

**State**

Ohio

**ZIP**

43215

**Project Vendors**

Search | Find on Page

OAKS Business Unit	Vendor Name	OAKS Ven...	Local Ven...	City	Status	Re
DAS01	Amazing Architectural Inc.	000009124		Columbus	Active	PV
SFC01	Harrison Planning Group			Columbus	Active	PV
SFC01	Resource International, Inc.	0000041980		Columbus	Active	PV

Total: 3

Cancel Select

**Payment Requested**

**Final Payment? \***

No

**Amount (\$) \***

5,000.00

**Invoices for Reimbursable Exp. Attached?**

No

**Line Item Total (\$)**

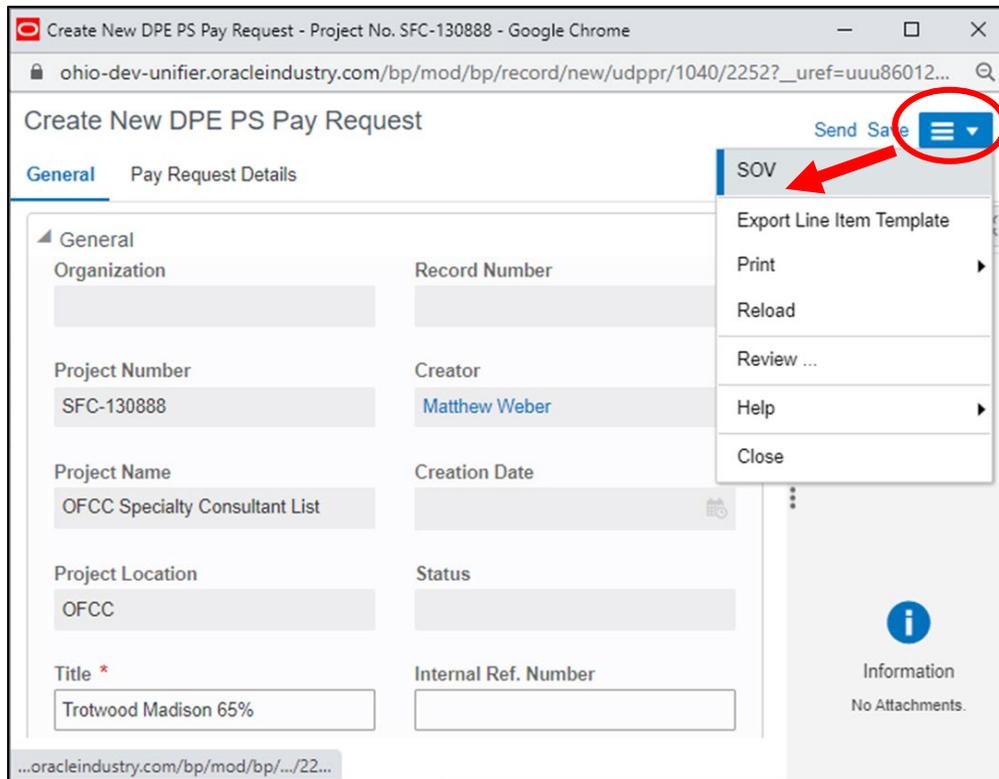
0.00

**Difference (\$)**

5,000.00

# 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 the Menu Button → SOV at the top of your window



# Review SOV

- ▶ This allows you to look at the Commits Remaining Balance for each of the line items on your SOV

Screenshot of a web browser showing a "Schedule of Values" table. The browser title is "Schedule of Values- (Base Record: agree-0001) - Google Chrome". The URL is "ohio-dev-unifier.oracleindustry.com/bp/sov/view/processing?docid=0&recordid=89&\_uref=uuu366860...". The table is titled "Schedule of Values" and the currency is "United States Dollar (USD)".

Item #	Ref	Description	WBS Code	Commits Remaining Balance
000010	<a href="#">1</a>	Basic Services - Landscape	<a href="#">AE-BS-BE</a>	0.00
000020	<a href="#">2</a>	Basic Services	<a href="#">AE-BS-BE</a>	0.00
000030	<a href="#">3</a>	Change Order Fee Allowance	<a href="#">AE-AS-CO</a>	0.00
000040	<a href="#">4</a>	Schematic	<a href="#">AE-BS-SD</a>	89,000.00
000050	<a href="#">5</a>	Professional Design	<a href="#">AE-AE-BE</a>	155,000.00
000060	<a href="#">6</a>	Basic Services	<a href="#">AE-BS-BE</a>	12,500.00
000070	<a href="#">7</a>	Design	<a href="#">AE-BS-DD</a>	32,500.00
000080	<a href="#">8</a>	Tests	<a href="#">AE-AS-TI</a>	0.00
000090	<a href="#">9</a>	tests	<a href="#">AE-AS-TI</a>	0.00
000100	<a href="#">10</a>	Test	<a href="#">AE-AS-TI</a>	0.00
000110	<a href="#">11</a>	Test	<a href="#">AE-AS-TI</a>	0.00
000120	<a href="#">12</a>	Tests	<a href="#">AE-AS-TI</a>	0.00
000130	<a href="#">13</a>	Test's	<a href="#">AE-AS-TI</a>	0.00
000140	<a href="#">14</a>	Tests	<a href="#">AE-AS-TI</a>	0.00
000150	<a href="#">15</a>	testing	<a href="#">AE-AS-TI</a>	0.00
000160	<a href="#">16</a>	Test soil	<a href="#">AE-AS-TI</a>	0.00
				290,400.00

Buttons at the bottom: Apply, OK, Close.

# Add Line Items

- a) Click on the **Pay Request Detail Tab**
- b) Click **Add**

# Add Line Items

- c) Click the **Select** button next to WBS Code
- d) Choose the appropriate line
- e) Click Select

The screenshot shows the 'Create New DPE PS Pay Request' application. The 'Line Item Details' form is visible, with the 'WBS Code' field set to 'CS-FA-SV'. A red circle labeled 'c' is around the 'Select' button next to the WBS Code field. A red arrow points from this button to the 'SOV Picker' modal. The modal displays a table of SOV items with columns: Item #, Ref, Description, and CBS Code. The first row, '000010 1 Contract Amount (Not Billable) CS-FA-SV', is highlighted with a red box and labeled 'd'. At the bottom of the modal, there are 'Cancel' and 'Select' buttons. The 'Select' button is circled in red and labeled 'e'.

Item #	Ref	Description	CBS Code
000010	1	Contract Amount (Not Billable)	CS-FA-SV
000020	2	Champion High School	CS-FA-OT
000030	3	Champion Middle School	CS-FA-OT
000040	4	Champion Central Elementary School	CS-FA-OT
000050	5	Champion LSD Printing fee	CS-FA-OT
000060	6	Trotwood School District	CS-FA-OT
000070	7	Trotwood School District	CS-FA-OT
000080	8	Trotwood School District	CS-FA-OT
000090	9	Educational Planning	CS-PL-ED
000100	10	planning	CS-PL-ED
000110	11	Educational Planning	CS-PL-ED

# Add Line Items

- ▶ Enter a Short Description, select Service Category and the Amount
- ▶ Click “Save & Add New” to add additional lines
- ▶ Click “Save” to finish



Create New DPE PS Pay Request - Project No. SFC-130888 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/udppr/1040/2252?\_uref...

Create New DPE PS Pay Request Send Save

General **Pay Request Details**

**Line Item Details**

WBS Code \*  
CS-FA-SV

Code Name  
CS Assessment SOV Pending

District \*  
Westerville City SD

Service Category \*  
Facility Assessment

Work Assignment

Short Description \*  
Facility Assessment

Item Quantity \*  
1

Item Unit Cost \*  
15,000.00

Percent Billed This Request  
100

Amount (\$) 15,000.00

Cancel **Save** **Save & Add New**



# Add Line Items

- ▶ Saved Line Item information displays in the **Pay Request Details** tab
- ▶ Continue to enter line items as necessary
- ▶ The **Total Amount** of all Line Items will display at the bottom

The screenshot shows a web application interface for creating a new DPE PS Pay Request. The browser address bar indicates the URL is `ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/udppr/1040/2252?_uref=uuu860121972t10`. The page title is "Create New DPE PS Pay Request".

The interface is divided into two main sections: a table for line items and a detailed form on the right.

**Line Item Table:**

No.	SOV R...	WBS Code	District	Service Category	Sh
001	6	CS-FA-OT	Alliance City SD	Facility Assessment	Fa

**Summary Bar:**

Total: 1

Total Amount: 5,000.00

**Form Details (Right Panel):**

- General**
- SOV Reference Number: 6
- WBS Code: CS-FA-OT
- Code Name: CS Other Facility Assessment
- District: Alliance City SD
- Service Category: Facility Assessment
- Work Assignment: (empty)
- Short Description: Facility Assessment
- Item Quantity: 1

Buttons at the bottom: Cancel, Save, Save & Add New.

# Add Line Items

- ▶ Click the **General** tab to return
- ▶ Ensure that the total dollar amount seen on the **Pay Request Details** tab matches the Amount seen on the **General** tab

The screenshot shows a web browser window titled "Create New DPE PS Pay Request - Project No. SFC-130888 - Google Chrome". The URL is "ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/udpr/1040/2252?\_uref=uuu860121972t10". The page title is "Create New DPE PS Pay Request". The "General" tab is selected and highlighted with a red circle and a red arrow. The "Pay Request Details" section contains the following fields:

- Address Line 1: 1234 My Place
- Address Line 2: (empty)
- City: Columbus
- State: Ohio
- ZIP: 43215

The "Payment Requested" section contains the following fields:

- Final Payment?: No
- Invoices for Reimbursable Exp. Attached?: No

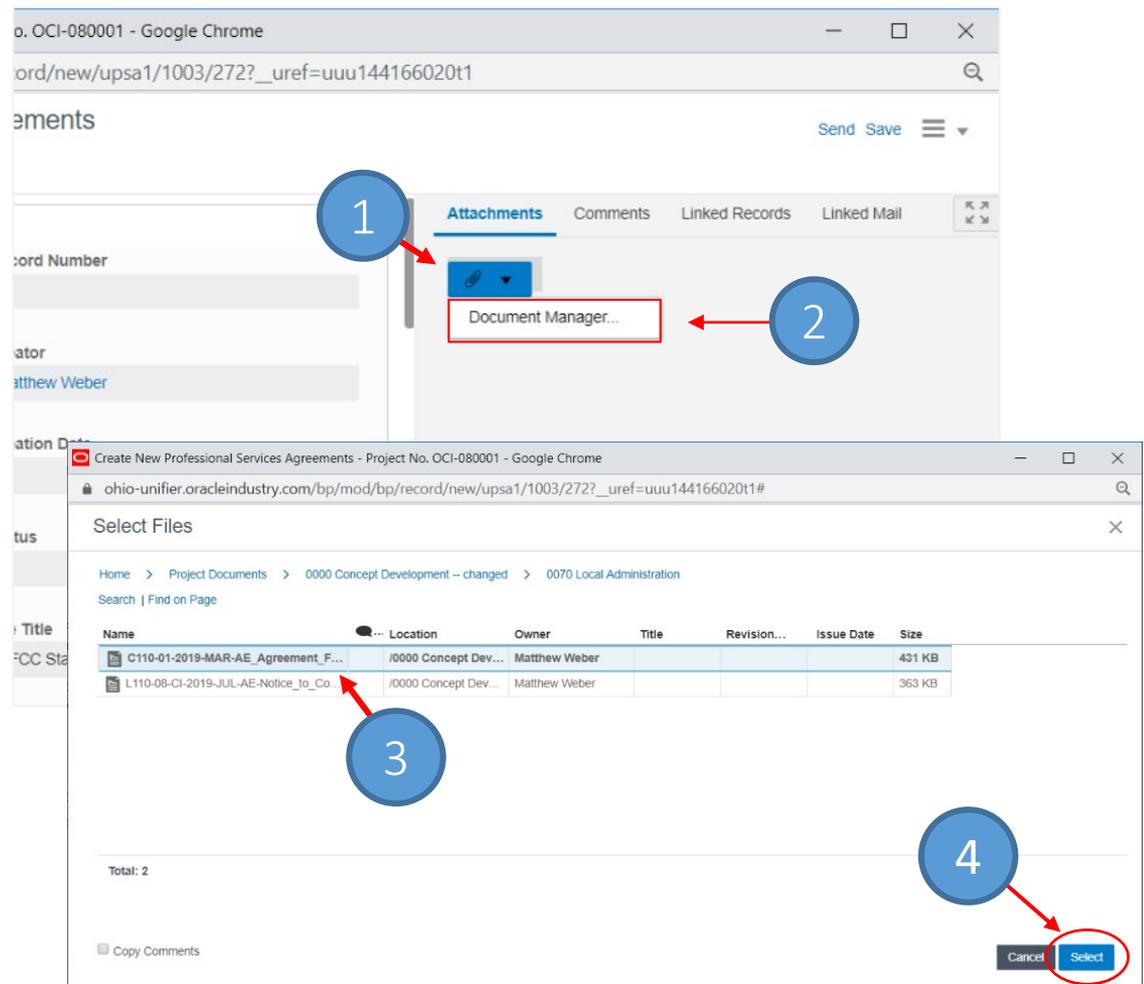
The "Amount (\$)" field is highlighted with a red box and contains the value 5,000.00. The "Line Item Total (\$)" field also contains the value 5,000.00. The "Difference (\$)" field contains the value 0.00.

The "Attachments" section on the right shows "Information" and "No Attachments."

# Add Attachments

*Upload all documents to [Document Manager](#) prior to attaching documents*

- 1) Under the **Attachments** tab on the right side of the record, click the attachments button
- 2) Choose **Document Manager**
- 3) Navigate to the folder where the document is stored; select the document you wish to attach
- 4) Click **Select**



# Add Attachments

The Document Manager screen will close:

*The added attachment(s) will be updated and display under the Attachments tab*

- ▶ When the record is ready to move forward, click **Send**

The screenshot shows a web browser window with the URL `ohio-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/312376/1?_uref=uuu418648075t1#`. The page title is "Create New Professional Services Pay Request". In the top right corner, there is a "Send Save" button with a red arrow pointing to it. The main content area is divided into two sections: "General" and "Attachments".

The "General" section contains the following fields:

Organization	Record Number
OAKS CI Test	
Project Number	Creator
OCI-080001	Matthew Weber
Project Name	Creation Date
Agency General Projects Test	
Project Location	Status
OAKS CI Administration	
Title *	Internal Ref. Number
Matt's Consulting OCI-00081_PI	
Contract Reference *	Professional Services Provider
mmw-test new wor...	OCI Test General

The "Attachments" section is active and shows a table with one entry:

Name
Published Attachments
<input checked="" type="checkbox"/> C110-01-2019-MAR-AE...

The total number of attachments is displayed as "Total: 1".

# Submit Record

- ▶ Verify Workflow Action: Submit
- ▶ You must now choose who to send the record to
- ▶ Click the Select button and choose the appropriate person
- ▶ Use the arrow button to move the name from available to selected
- ▶ Click Done

The image shows two overlapping screenshots from an Oracle HR system. The background screenshot is titled 'Create New DPE PS Pay Request - Project No. SFC-130888 - Google Chrome' and shows the 'Workflow Action Details' dialog. In this dialog, the 'Workflow Actions' dropdown is set to 'Submit' (highlighted with a red box). Below it, the 'To' field contains 'Matthew Weber' (highlighted with a red circle). A red arrow points from this field to the 'User and Group Picker' dialog in the foreground.

The foreground screenshot is titled 'Create New Professional Services Pay Request - Project No. OCI-100001 - Google Chrome' and shows the 'User and Group Picker' dialog. It displays a list of 'Available Items' and a 'Selected Items' list. The 'Available Items' list is as follows:

Item	First Name	Last Name
Consultant Student5	Consultant	Student5
Consultant Student6	Consultant	Student6
Consultant Student7	Consultant	Student7
Consultant Student8	Consultant	Student8
Consultant Student9	Consultant	Student9
Matthew Weber	Matthew	Weber
shauna hooks	shauna	hooks

The 'Selected Items' list contains:

Name	Company
Matthew Weber	State of Ohio

Red annotations in the 'User and Group Picker' dialog include a red box around the right arrow button next to 'Matthew Weber' in the 'Available Items' list, and a red circle around the 'Done' button at the bottom right.

# Submit Record

- ▶ Click Send

Create New DPE PS Pay Request - Project No. SFC-130888 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/udppr/1040/2252?\_\_uref=uuu860121972t10

Create New DPE PS Pay Request

General Pay Request

Address Line 1  
1234 My Place

Address Line 2

City  
Columbus

State  
Ohio

ZIP  
43215

Payment Requester  
Final Payment? \*  
No

Workflow Action Details

Action Details

Workflow Actions \*  
Submit

Send For  
RPC Approval and Validator

To  
Matthew Weber

CC  
Start typing for suggestions...

Due Date Details

Task Due Date

Task Due Date is not available

Cancel Send

Attachments

Information  
No Attachments.

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



# Basic Record Status

- ▶ In Logs, choose Record type, click on specific Record
- ▶ The basic status can be viewed in the “Record Details” preview

The screenshot displays the Oracle Primavera Unifier interface. The top navigation bar includes the Oracle logo, 'PRIMAVERA Unifier', and user information 'Katie Tuttle'. The main navigation menu on the left lists various modules, with 'Logs' and 'Action Items' circled in red. The central pane shows a table of 'Action Items' with columns for Record No, Title, Assignee, and Due Date. The first row is highlighted in blue. A red arrow points from this row to the 'Record Details' pane on the right. In the 'Record Details' pane, the 'Status' field is circled in red and shows 'Pending'.

**ORACLE PRIMAVERA Unifier** Katie Tuttle Sign Out

School Facilities OAKS CI District... Oak Hills Local ... OAKS CI Trainin... +

Agency > OAKS CI Training > OAKS CI Training 4

**Action Items** Switch to Classic View

+ Create Actions View All Records [Refresh] [Print] [Close]

Record No	Title	Assignee	Due D
AI-00165	Test Action Item		05/0
AI-00164	test 1		05/0
AI-00163	test 1		05/0
AI-00162	Chris Hare		04/1
AI-00161	Carol Amistadi _ PPH		04/1
AI-00160	Winnie Agbalevu		04/1
AI-00159	Katie Marie		04/1
AI-00158	Ben Posey		04/1
AI-00157	katie		04/1
AI-00156	DAVE BILLS		04/1
AI-00155	Emily Rinear		04/1
AI-00154	Katie Tuttle		04/1
AI-00153	STUDENT 4		03/3

Total: 165

**Record Details** Workflow Progress

**General**

Organization	Record Number
Department of Administrative Services	AI-00165
Project Number	Creator
OCI-090004	Katie Tuttle
Project Name	Creation Date
OAKS CI Training 4	05/02/2017 10:20 AM (UTC-8)
Project Location	
4200 Surface Road	
Title	Status
Test Action Item	Pending
Assignee	Priority
	Medium
Meeting Minute	Due Date
	05/09/2017 10:05 AM (UTC-8)

**Action**

# Workflow Progress

- ▶ Click “Workflow Progress” in the preview screen to view the step-by-step information about this record

The screenshot displays the Oracle Primavera Unifier interface. The top navigation bar includes the Oracle logo, the text 'PRIMAVERA Unifier', and the user name 'Katie Tuttle'. The breadcrumb trail shows 'Agency > OAKS CI Training > OAKS CI Training 4'. The main content area is divided into two sections: 'Action Items' on the left and 'Record Details' on the right. The 'Record Details' section has a sub-tab 'Workflow Progress' which is highlighted with a red arrow. Below this, a table shows the workflow steps for record AI-00165. A red box highlights this table.

**Action Items Table:**

Record No	Title	Assignee	Due Date
AI-00165	Test Action Item		05/09/2017
AI-00164	test 1		05/01/2017
AI-00163	test 1		05/01/2017
AI-00162	Chris Hare		04/19/2017
AI-00161	Carol Amistadi _ PPH		04/19/2017
AI-00160	Winnie Agbalevu		04/14/2017
AI-00159	Katie Marie		04/19/2017
AI-00158	Ben Posey		04/19/2017
AI-00157	katie		04/13/2017
AI-00156	DAVE BILLS		04/13/2017
AI-00155	Emily Rinear		04/12/2017
AI-00154	Katie Tuttle		04/14/2017
AI-00153	STUDENT 4		03/30/2017
AI-00152	Student 2	Student 1	04/27/2017
AI-00151	Student 6		03/30/2017

**Workflow Progress Table:**

Step Name	Assignee	Status	Action
Creation	Katie Tuttle	Completed	Send
Response	Steve Mayo	Not Started	
Response	Oaks Instructor	Not Started	
Response	Bill Schwertfager	Not Started	
Response	Rita Nichols	Not Started	
Review			
Response Support			
Delegate Response			
End			

# Questions?

Please contact OAKS CI Support Desk:

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

614.644.2211