



Professional Services Pay Request

Specialty Consultants

Purpose & Procedure

- ▶ 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: **OFCC Staff Approval** →
Sent to: **Consultant Update (if necessary)** → Sent to: **OFCC Fiscal Review** → 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

PS Pay Request Creation

- ▶ In OAKS CI navigate to:
 - ▶ Logs -> Professional Services Pay Request
 - ▶ Click Create

The screenshot shows the Oracle Primavera Unifier (Development) interface. The top navigation bar includes 'ORACLE' and 'PRIMAVERA Unifier (Development)'. Below this, the 'Agency' dropdown is set to 'SAO Consultant...'. A left-hand navigation menu is open, with 'Logs' highlighted in red. A red arrow points from the text 'Click Create' in the list to the 'Professional Services Pay Request' option in the menu. In the main content area, the 'Professional Services Pay Request' page is displayed. A red circle highlights the '+ Create' button in the top right corner of the page. Below the button is a table with the following data:

	Title
	Tech Inc. PR#1
	Test of Update to BP
	OCI-090001-01
	OCI-090001-01
	OCI-09001-01
	DMR
	Bobo' Tent -09000-1
	OCI-0900001-1
	Design Services for OCI-0
	Design Services for OCI-0
	Desing Srv OCI-090001
	Design Services For Oci-0
	Design Services for OCI0
	design services for oci 09

At the bottom right of the table, it says 'Total: 50'.

Complete Form

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

- Enter **Title**
- Click select button next to **Contract Reference**
- Choose contract from list in new window
- Click **Select**
- Enter **Period From** and **Period To** dates

The screenshot displays the 'Create New Professional Services Pay Request' form in a web browser. The form is divided into two tabs: 'General' and 'Pay Request Details'. The 'General' tab is active, showing fields for Organization (Ohio Facilities Construction Commission), Project Number (OCI-100001), Project Name (SAO Consultant List), and Project Location (30 West Spring Street). Below these are fields for Title (*), Contract Reference (*), Agreement Type, Other Description, Period From (*), and Period To (*). The 'Title' field contains 'Test Consultant PR'. The 'Contract Reference' field shows a dropdown menu with 'Design Services for OCI-090001' selected. A red circle 'b' highlights the 'Select' button next to the dropdown. A modal window titled 'Professional Services Agreements' is open, showing a table of agreements. A red circle 'c' highlights the 'Select' button in the modal. A red circle 'd' highlights the 'Select' button in the modal. A red circle 'e' highlights the 'Period From' and 'Period To' fields in the form. A red circle 'a' highlights the 'Title' field in the form.

Title	Professional Services Provi...	Agreement Type	Total Agreement A...	CA Ho...
ADJ-150006 Firm Name	Sands Decker Ltd.	Design	15,000.00	0
DRC-150002 Archie Architectural	Archie's Architectural Inc.	Study	65,000.00	0
OCI-140001 - Steve's Electrical	Steve's Electrical Contracting	Design	16,000.00	8
Design Services for DOT 01-00...	Archie's Architectural Inc.	Design	70,000.00	0
Design Services for OCI-090...	Archie's Architectural Inc.	Design	80,000.00	0

Complete Form

- f) In the Payment Requested block, choose Yes/No for **Final Payment**
- g) Enter Amount
- h) Choose Yes/No for **Invoices for Reimbursable Ex. Attached**

Agreement Type Design	EDGE Certified? No
Other Description	Received Date
Period From * 09/01/2020 05:00 PM (UTC-5)	Period To * 09/30/2020 05:00 PM (UTC-5)
Payment Requested	
Final Payment? * No	Amount (\$) * 5,000.00
Invoices for Reimbursable Exp. Attached? * No	Line Item Total (\$) 0.00
	Difference (\$) 5,000.00

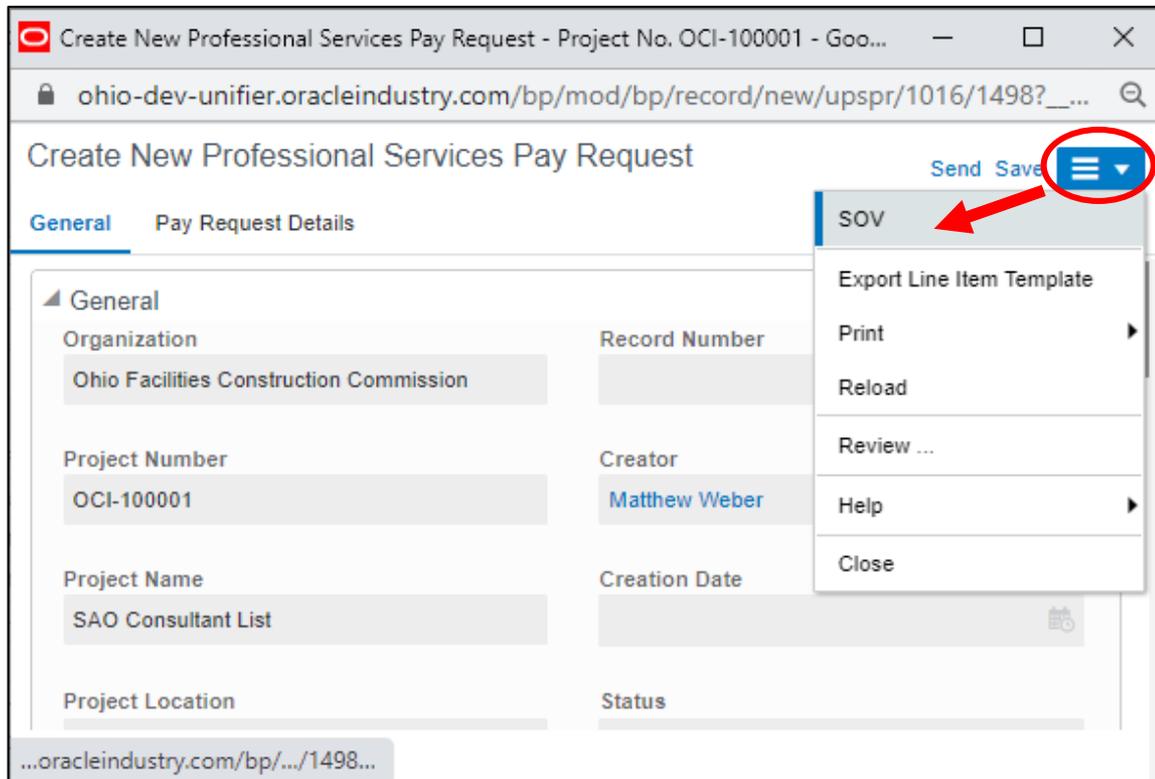
f

h

g

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

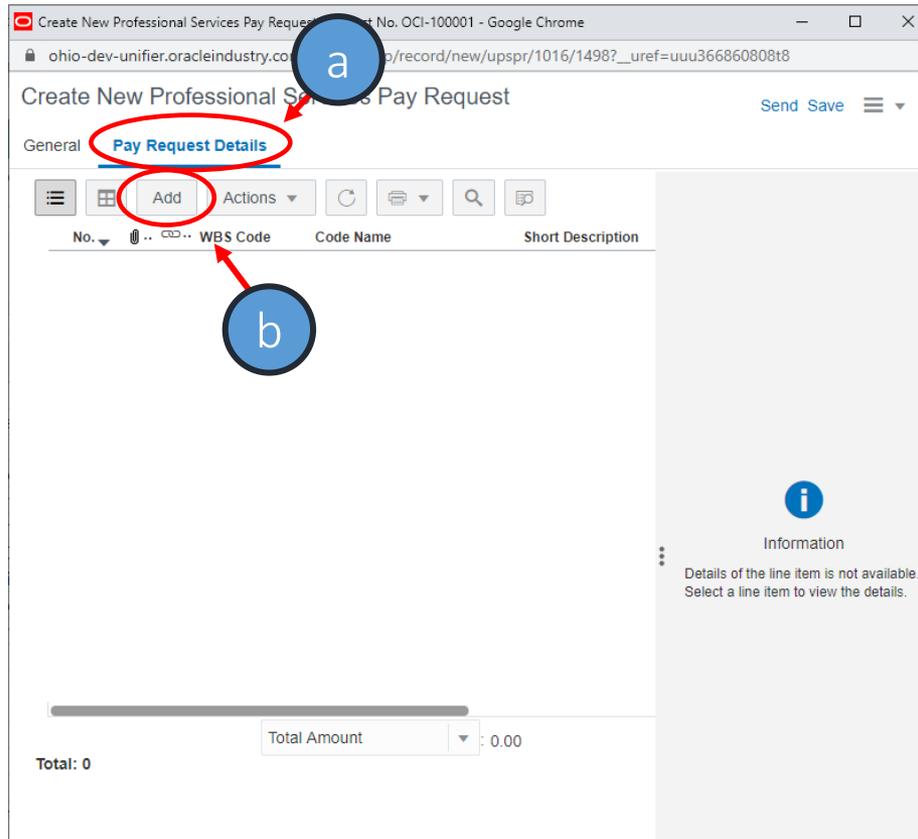
The screenshot shows a web browser window titled "Schedule of Values- (Base Record: agree-0001) - Google Chrome". The address bar shows the URL "ohio-dev-unifier.oracleindustry.com/bp/sov/view/processing?docid=0&recordid=89&_uref=uuu366860...". The browser's menu bar includes "File", "Edit", and "View". The "Export" button is circled in red, with a red arrow pointing to it. Below the menu bar, there are icons for "Import", "Rows", "Split", "Freeze", and "Fund Assignment". The main content area is titled "Schedule of Values" and "Currency: United States Dollar (USD)". A table with the following columns is displayed: "Item #", "Ref", "Description", "WBS Code", and "Commits Remaining Balance". The "Commits Remaining Balance" column is highlighted with a red box. The table contains 16 rows of data, with a total of 290,400.00 at the bottom.

Item #	Ref	Description	WBS Code	Commits Remaining Balance
000010	1	Basic Services - Landscape	AE-BS-BE	0.00
000020	2	Basic Services	AE-BS-BE	0.00
000030	3	Change Order Fee Allowance	AE-AS-CO	0.00
000040	4	Schematic	AE-BS-SD	89,000.00
000050	5	Professional Design	AE-AE-BE	155,000.00
000060	6	Basic Services	AE-BS-BE	12,500.00
000070	7	Design	AE-BS-DD	32,500.00
000080	8	Tests	AE-AS-TI	0.00
000090	9	tests	AE-AS-TI	0.00
000100	10	Test	AE-AS-TI	0.00
000110	11	Test	AE-AS-TI	0.00
000120	12	Tests	AE-AS-TI	0.00
000130	13	Test's	AE-AS-TI	0.00
000140	14	Tests	AE-AS-TI	0.00
000150	15	testing	AE-AS-TI	0.00
000160	16	Test soil	AE-AS-TI	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 WBS Code
- e) Click **Select**
- f) Enter a **Short Description** and the **Amount**
- g) Click **“Save & Add New”** to continue adding lines or **“Save”** to finish.

The image displays two screenshots from an Oracle HR system interface, illustrating the steps to add a line item to a pay request.

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

The main form is titled "Create New Professional Services Pay Request" and shows the "Pay Request Details" tab. The "Line Item Details" section is active, showing the following fields:

- WBS Code: AE-BS-BE (A red circle 'c' is around the select button next to it)
- Code Name: AE Basic Services Budget
- Short Description: Basic Services (A red box highlights this field, with a red circle 'f' next to it)
- Professional Services EDGE Certified?: No
- Amount (\$): 5,000.00 (A red box highlights this field)
- Subcontractor/Supplier: Type a Subcontractor/Supplier...
- EDGE Certified?:
- Subcontractor/Supplier Name:

At the bottom of the form, the "Save & Add New" button is circled in red, with a red circle 'g' next to it. The "Total Amount" is shown as 0.00.

Right Screenshot: SOV Picker

The "SOV Picker" dialog shows a table of items with the following data:

Item #	Ref	Description	CBS Code	Breakdown
000010	1	Basic Services - Landscape	AE-BS-BE	
000020	2	Basic Services	AE-BS-BE	
000060	6	Basic Services	AE-BS-BE	

A red circle 'd' is around the "AE-BS-BE" CBS Code in the second row. A red circle 'e' is around the "Select" button at the bottom right of the dialog.

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

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

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/upspr/1016/1498?_uref=uuu366860808t8

Create New Professional Services Pay Request

Send Save

General **Pay Request Details**

Add Actions

No.	WBS Code	Code Name	Short Desc...	Amount
001	AE-BS-BE	AE Basic Services Budget	Basic Services	5,000.00

Total: 1

Total Amount : 5,000.00

Line Item Details Attachments Linked Re

General

WBS Code *
AE-BS-BE

Code Name
AE Basic Services Budget

Short Description *
Basic Services

Professional Services EDGE Certified?
No

Amount (\$) *
5,000.00

Cancel Save

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 Professional Services Pay Request - Project No. OCI-100001 - Google Chrome". The URL is "ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/upspr/1016/1498?_uref=uuu366860808t8". The page title is "Create New Professional Services Pay Request". There are two tabs: "General" (selected and circled in red) and "Pay Request Details". A red arrow points to the "General" tab. The form contains several fields:

- Contract Reference ***: Design Services for OCI-090001
- Professional Services Provider**: Archie's Architectural Inc.
- Agreement Type**: Design
- EDGE Certified?**: No
- Other Description**: (empty)
- Received Date**: (empty)
- Period From ***: 09/01/2020 05:00 PM (UTC-5)
- Period To ***: 09/30/2020 05:00 PM (UTC-5)
- Payment Requested**:
 - Final Payment? ***: No
 - Invoices for Reimbursable Exp. Attached? ***: No
- Amount (\$) ***: 5,000.00
- Line Item Total (\$)**: 5,000.00
- Difference (\$)**: 0.00

The "Amount (\$)", "Line Item Total (\$)", and "Difference (\$)" fields are circled in red. On the right side, there is an "Attachments" section with a plus icon and an "Information" icon with the text "Information 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**

The image shows two overlapping browser windows. The top window displays a record page with a right-hand navigation pane containing tabs for 'Attachments', 'Comments', 'Linked Records', and 'Linked Mail'. A blue button with a plus sign and a document icon is highlighted with a red circle labeled '1'. A red arrow points from this button to a dropdown menu that is open, showing 'Document Manager...' highlighted with a red box and a red circle labeled '2'. The bottom window is a 'Select Files' dialog box. It shows a breadcrumb trail: 'Home > Project Documents > 0000 Concept Development -- changed > 0070 Local Administration'. Below this is a search bar and a table of files. The table has columns for Name, Location, Owner, Title, Revision..., Issue Date, and Size. Two files are listed: 'C110-01-2019-MAR-AE_Agreement_F...' (431 KB) and 'L110-08-CI-2019-JUL-AE-Notice_to_Co...' (363 KB). A red circle labeled '3' highlights the second file. At the bottom right of the dialog, there are 'Cancel' and 'Select' buttons. A red circle labeled '4' highlights the 'Select' button, with a red arrow pointing to it.

Name	Location	Owner	Title	Revision...	Issue Date	Size
C110-01-2019-MAR-AE_Agreement_F...	/0000 Concept Dev...	Matthew Weber				431 KB
L110-08-CI-2019-JUL-AE-Notice_to_Co...	/0000 Concept Dev...	Matthew Weber				363 KB

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**

Create New Professional Services Pay Request - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/312376/1?_uref=uuu418648075t1#

Create New Professional Services Pay Request **Send Save**

General Pay Request Details

General

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

Attachments Comments Linked

Published Attachments

<input checked="" type="checkbox"/>	C110-01-2019-MAR-AE...
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Total: 1

Submit Record

- ▶ Verify Workflow Action: Submit
- ▶ You must now choose the PM 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 screenshot displays two overlapping windows from a web application. The background window is titled 'Workflow Action Details' and shows a dropdown menu with 'Submit' selected. Below it, the 'To' field contains 'Matthew Weber'. A red box highlights the 'Submit' option, and a red circle highlights the 'Select' button next to the name. The foreground window is titled 'User and Group Picker' and shows a list of 'Available Items' with columns for 'Name', 'First Name', and 'Last Name'. The user 'Matthew Weber' is highlighted in blue. A red arrow points to the right-pointing arrow button next to his name. The 'Selected Items' list on the right shows 'Matthew Weber' and 'State of Ohio'. A red circle highlights the 'Done' button at the bottom right of the picker dialog.

Available Items	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

Selected Items	Name	Company
Users	Matthew Weber	State of Ohio

Submit Record

- ▶ Click Send

The screenshot shows a web browser window titled "Create New Professional Services Pay Request - Project No. OCI-100001 - Google Chrome". The address bar shows the URL "ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/upspr/1016/1498?__uref=uuu366860808t8#". The main content area displays a "Workflow Action Details" dialog box. The dialog box has a "Send Save" button in the top right corner. The "Action Details" section includes a "Workflow Actions" dropdown menu set to "Submit", a "Send For" dropdown menu set to "PM Approval", a "To" field containing "Matthew Weber" (highlighted with a red box), and a "CC" field with the placeholder text "Start typing for suggestions...". The "Due Date Details" section includes a "Task Due Date" field and an information icon with the message "Task Due Date is not available". At the bottom of the dialog box, there are "Cancel" and "Send" buttons, with the "Send" button highlighted by a red circle and a red arrow pointing to it from the right.

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, the text 'PRIMAVERA Unifier', and user information 'Katie Tuttle'. Below this, a breadcrumb trail shows 'Agency > OAKS CI Training > OAKS CI Training 4'. The left sidebar contains a menu with 'Logs' circled in red. The main area is divided into 'Action Items' and 'Record Details'. The 'Action Items' table lists records with columns for Record No, Title, Assignee, and Due Date. The first record, AI-00165, is highlighted. A red arrow points from this record to the 'Record Details' panel. In the 'Record Details' panel, the 'Status' is 'Pending', which is also circled in red. Other details include Organization (Department of Administrative Services), Record Number (AI-00165), Project Number (OCI-090004), Creator (Katie Tuttle), Project Name (OAKS CI Training 4), Creation Date (05/02/2017 10:20 AM (UTC-8)), Project Location (4200 Surface Road), Title (Test Action Item), Assignee, Priority (Medium), Meeting Minute, and Due Date (05/09/2017 10:05 AM (UTC-8)).

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

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

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 'Workflow Progress' on the right. A red arrow points to the 'Workflow Progress' tab in the 'Record Details' section. The 'Action Items' table lists various records with columns for Record No, Title, Assignee, and Due Date. The 'Workflow Progress' section shows a table with columns for Step Name, Assignee, Status, and Action, detailing the steps of the workflow for record AI-00165.

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

Title	Record Number	Current Step	BP Setup Used
Test Action Item	AI-00165	Response	Action Items

Filter By: All Steps

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

614.644.2211