OAKS
Capital Improvements

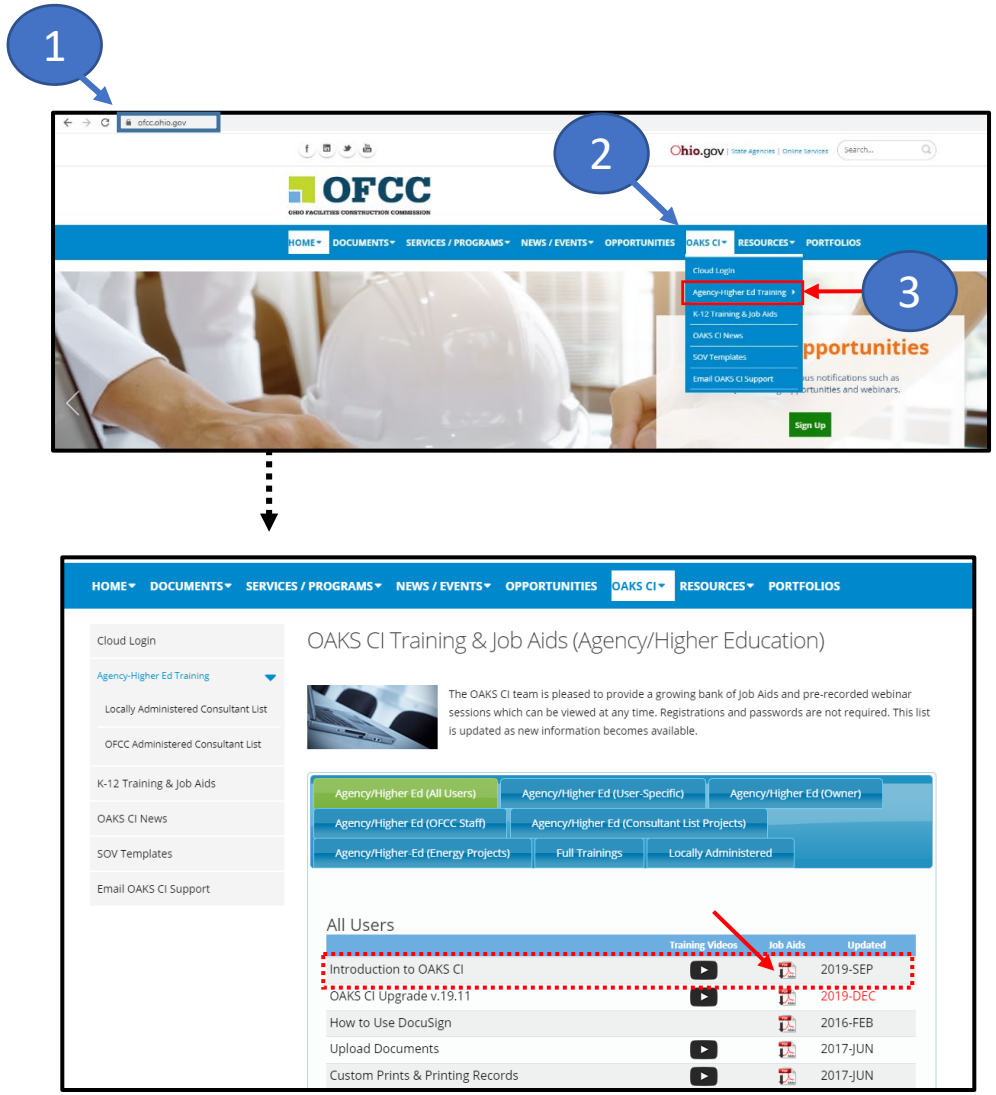
Local Administration
Consultant List

OFCC
OHIO FACILITIES CONSTRUCTION COMMISSION

OAKS CI Training and Support

To view additional job aids and training materials for OAKS CI:

1. Navigate to ofcc.ohio.gov
2. Mouse over the OAKS CI tab
3. Click Agency/Higher Ed Training



Before proceeding through this training document, it is recommended you view the Introduction to OAKS CI job aid.

For additional help, please contact the OAKS CI Support Desk - oaksci@ofcc.ohio.gov

Topics

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Overview of Changes to the Consultant List Process

- OFCC is delegating the selection, reservation, contracting and payment of Consultants to the user Agency on locally administered projects.
- Each Agency will utilize OFCC's centralized list of vendors, and business processes integrated into OAKS CI, for the procurement and administration of Consultant List projects.
- OFCC will be issuing a $2,000 flat fee to the user Agency for each Consultant agreement, and this flat fee will not fluctuate during a project, if a Consultant's services are increased or decreased.
- OFCC has received Controlling Board approval for public owner's use of the new Consultant List, with a limit of $250K maximum award to any firm during the biennium, similar to previous years. Each user Agency will need to seek Controlling Board approval (if applicable) for release of funding. These user Agency requests may be specific to each individual project, or an aggregate release for the fiscal year based on intended use of the Consultant List by that Agency.

One-Stop Shop for Consultant List Information

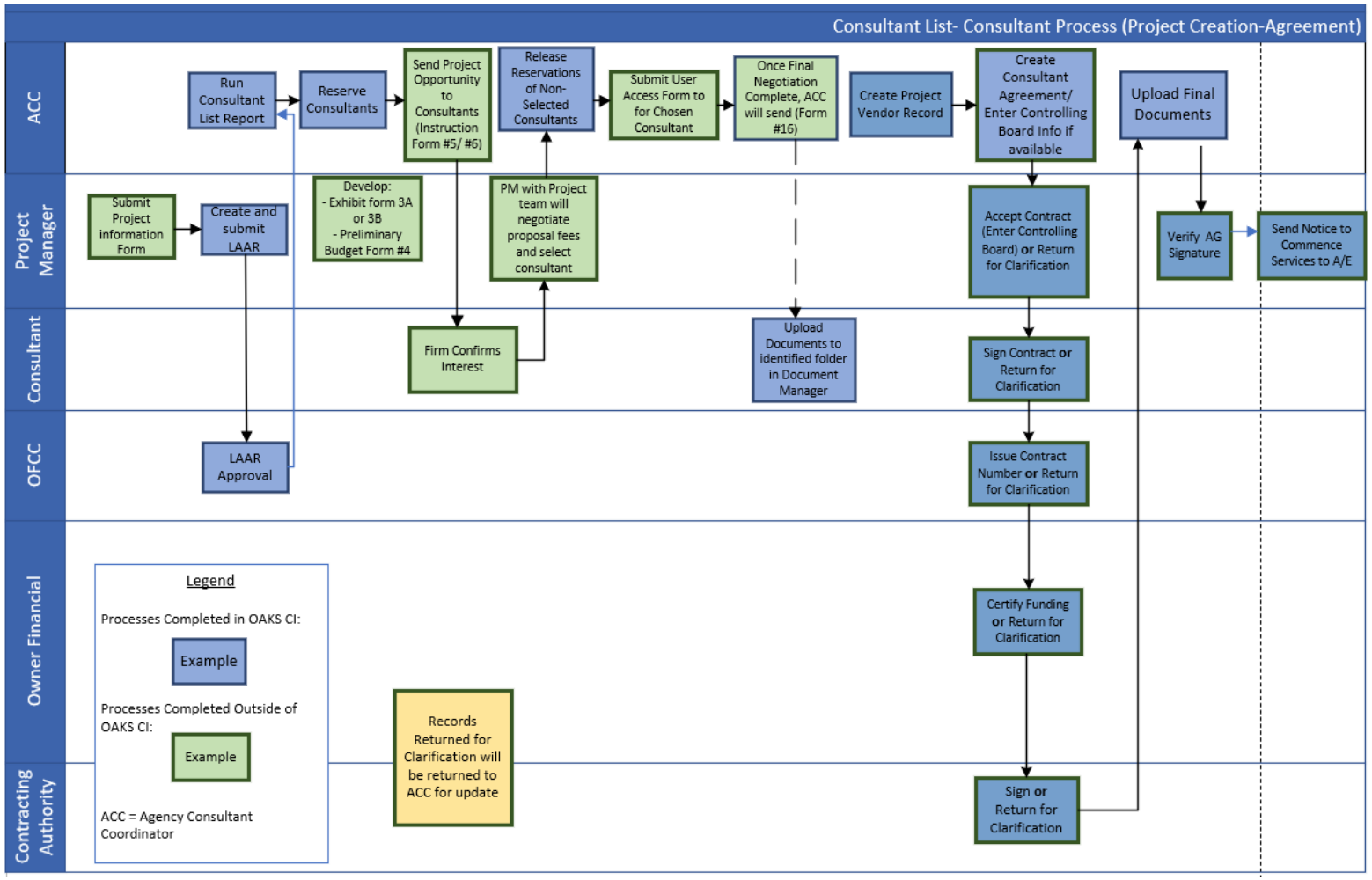
Consultant List Assistance:
tasheena.duresky@ofcc.ohio.gov

OAKS CI Assistance:
oaksci@ofcc.ohio.gov or 614.644.2211

Job Aids:
https://ofcc.ohio.gov/OAKS-CI/Agency-Higher-Ed-Training/Locally-Administered-Consultant-List

- OAKS CI Tab
- Agency/Higher Ed Training
- Local Consultant List Training:
- FAQ's, Training Guides, Consultant List Instructions and Forms

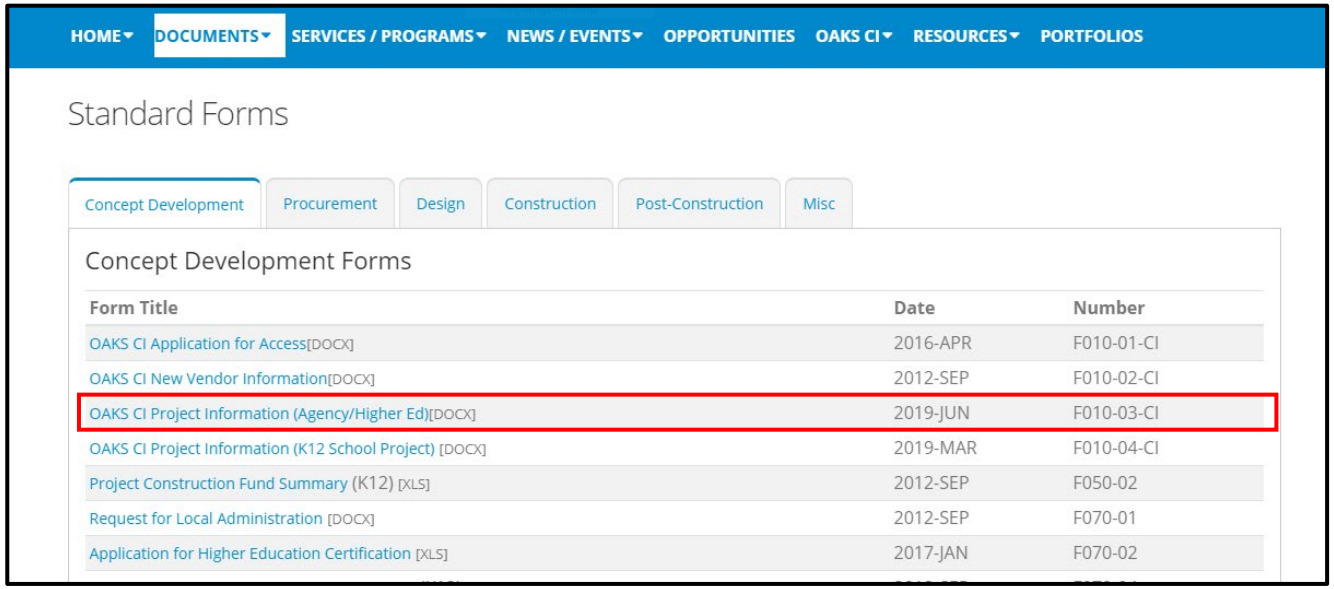
Consultant List Process



Project Request

Project Request

- Prior to completing any work in OAKS CI, the OAKS CI Project (Initiation) Information form must be completed and submitted to oaksci@ofcc.ohio.gov
- The form can be located at ofcc.ohio.gov under:
  - Documents tab → Standard Forms
  - Concept Development → OAKS CI Project Information (Agency/Higher Ed)



Create a Local Admin Authorization Request (LAAR)

Local Admin Authorization Request (LAAR)

The Local Administration Authorization Request business process provides for the submission, review, and resolution of Local Administration Authorization Request.

Local Admin Authorization Request OAKS CI Workflow

1. **Agency Owner or Project Manager**
   Initiates the request for local administration approval authority. Completes OFCC Form F070-01 (located at ofcc.ohio.gov) and all required attachments.

2. **Agency Institutional Designee**
   Reviews and validates that the request is appropriately submitted

3. **OFCC Team Support**
   Prepares and distributes the approval or rejection letter OFCC

4. **OFCC Program Manager Supervisor**
   Reviews the project management information and recommends approval or returns for clarification

5. **OFCC Fiscal Officer**
   Receives notification via OAKS CI

Identify Consultants

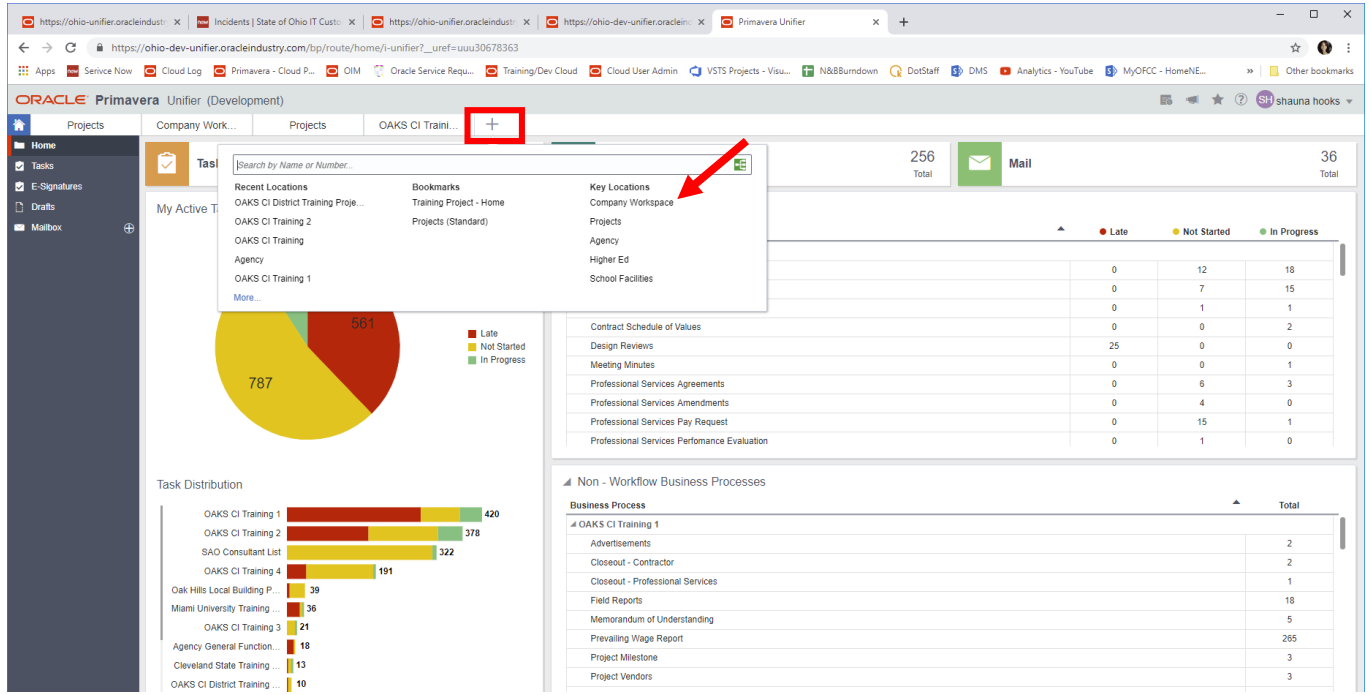
- Determine if selection is a Pick 1 or Pick 3
  - If over $100K, Pick 3 Vendors
  - If under $100K, Pick 1; however, a Pick 3 is still an option

- In order to identify Consultants for use, the Agency Consultant Coordinator (ACC) will run the below report:
  - **Consultant List Vendors Report-** identify consultants based on Capacity, Location and Discipline(s)

Identify Consultants

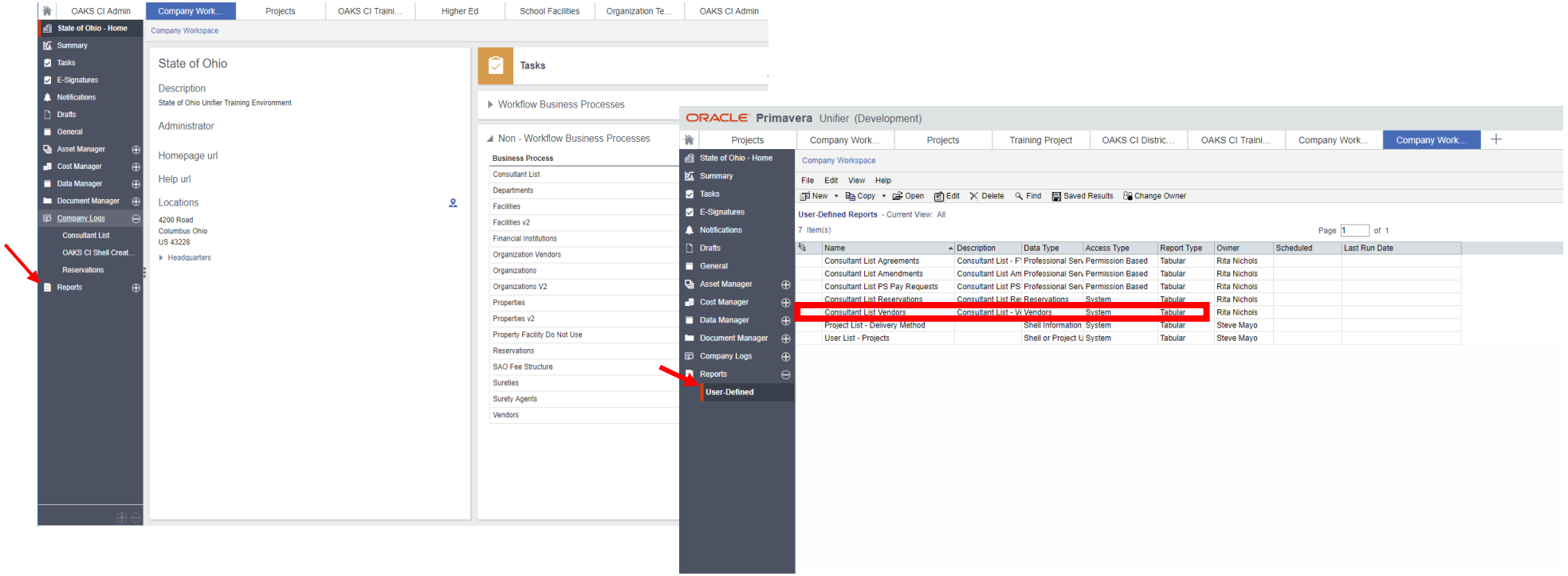
- In order to find applicable consultants, run the user defined report in OAKS CI previously mentioned
  - Log into OAKS CI
  - Click the + sign
  - Click Company Workspace

Please note: The report is housed in Company Workspace not within your project



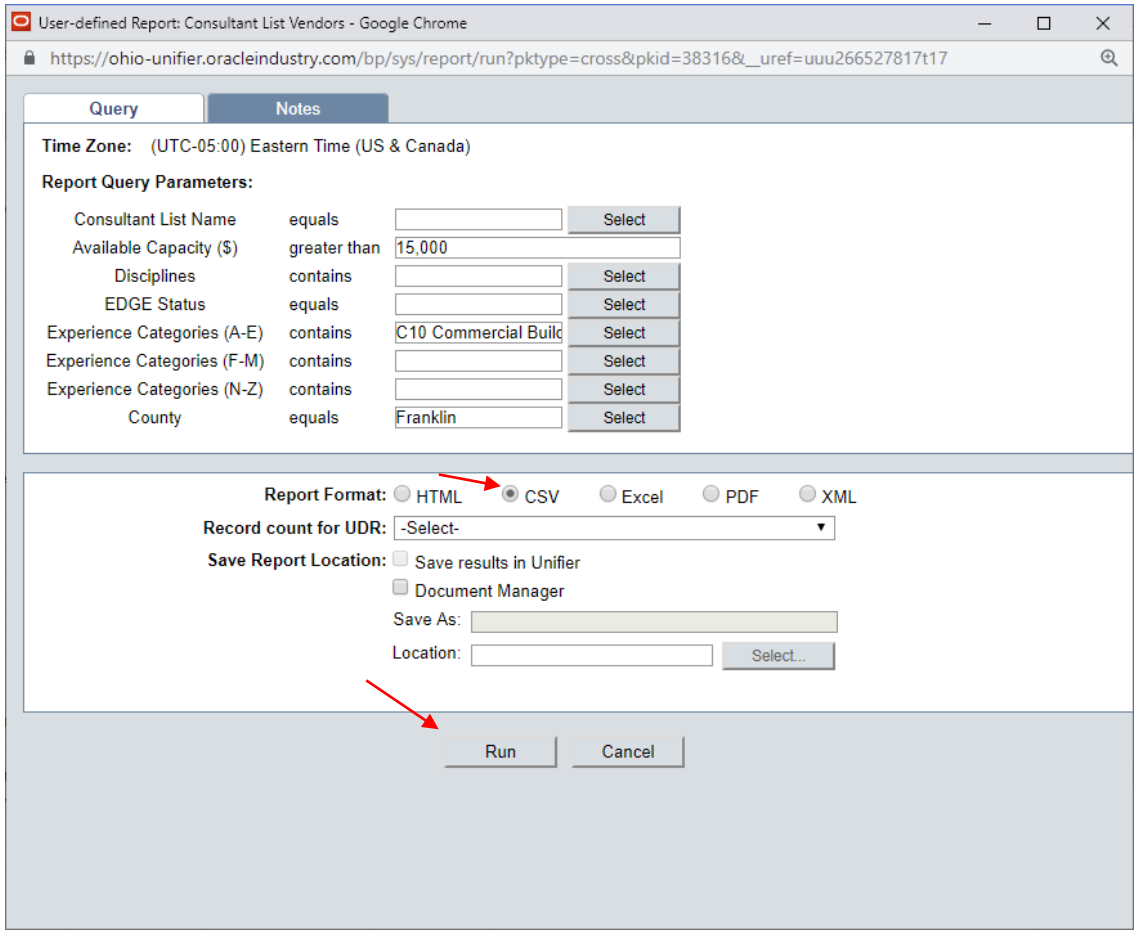
Identify Consultants- Consultant List Vendors Report

- Click Reports
  - Click User Defined
  - Double click the Report titled : Consultant List Vendors



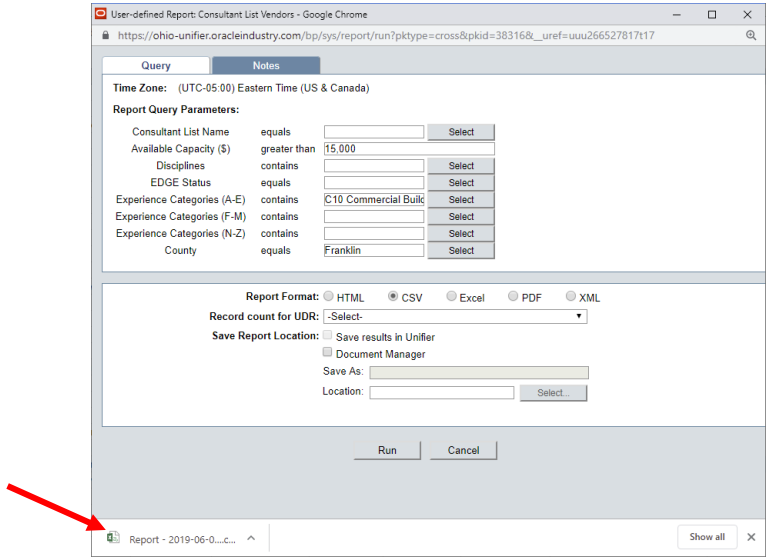
Identify Consultants – Consultant List Vendors Report

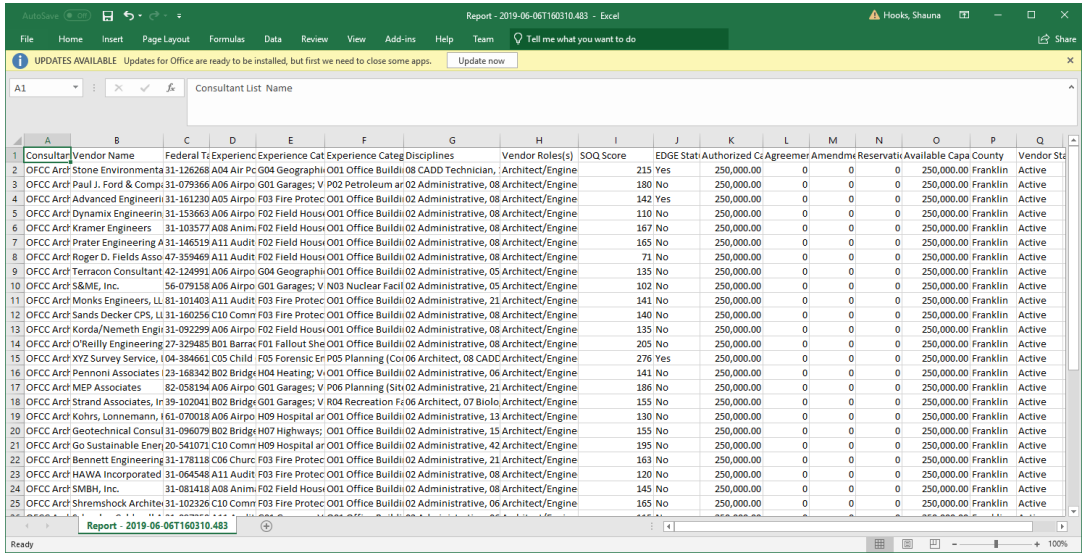
- Select query parameters
- Choose CSV format
- Click Run



Identify Consultants - Consultant List Vendors Report

- Click link to open
- View File (report can be saved to your computer)





Consultant	Vendor Name	Federal Ta	Experienc	Experience Cat	Experience Categ	Disciplines	Vendor Roles(s)	SOQ Score	EDGE Stati	Authorized Ca	Agreemer	Amendme	Reservati	Available Capa	County	Vendor Sta
OFCC Arch	Stone Environmenta	31-126268	A04 Air Pc	G04 Geographi	O01 Office Buildi	08 CADD Technician,	Architect/Engine	215	Yes	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch	Paul J. Ford & Compa	31-079366	A06 Airpo	G01 Garages; V	P02 Petroleum ar	02 Administrative, 08	Architect/Engine	180	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch	Advanced Engineerii	31-161230	A05 Airpo	F03 Fire Protec	O01 Office Buildi	02 Administrative, 08	Architect/Engine	142	Yes	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch	Dynamix Engineerin	31-153663	A06 Airpo	F02 Field Hous	O01 Office Buildi	02 Administrative, 08	Architect/Engine	110	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch	Kramer Engineers	31-103577	A08 Anim	F02 Field Hous	O01 Office Buildi	02 Administrative, 08	Architect/Engine	167	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch	Prater Engineering A	31-146519	A11 Audit	F02 Field Hous	O01 Office Buildi	02 Administrative, 08	Architect/Engine	165	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch	Roger D. Fields Asso	47-359469	A11 Audit	F02 Field Hous	O01 Office Buildi	02 Administrative, 08	Architect/Engine	71	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch	Terracon Consultant	42-124991	A06 Airpo	G04 Geographi	O01 Office Buildi	02 Administrative, 05	Architect/Engine	135	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch	S&ME, Inc.	56-079158	A06 Airpo	G01 Garages; V	N03 Nuclear Facil	02 Administrative, 05	Architect/Engine	102	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch	Monks Engineers, LL	81-101403	A11 Audit	F03 Fire Protec	O01 Office Buildi	02 Administrative, 21	Architect/Engine	141	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch	Sands Decker CPS, LL	31-160256	C10 Comm	F03 Fire Protec	O01 Office Buildi	02 Administrative, 08	Architect/Engine	140	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch	Korda/Nemeth Engi	31-092299	A06 Airpo	F02 Field Hous	O01 Office Buildi	02 Administrative, 08	Architect/Engine	135	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch	O'Reilly Engineering	27-329485	B01 Barrac	F01 Fallout She	O01 Office Buildi	02 Administrative, 08	Architect/Engine	205	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch	XYZ Survey Service, I	04-384661	C05 Child	F05 Forensic Er	P05 Planning (Cor	06 Architect, 08 CADD	Architect/Engine	276	Yes	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch	Pennoni Associates I	23-168342	B02 Bridge	H04 Heating; V	O01 Office Buildi	02 Administrative, 06	Architect/Engine	141	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch	MEP Associates	82-058194	A06 Airpo	G01 Garages; V	P06 Planning (Site	02 Administrative, 21	Architect/Engine	186	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch	Strand Associates, In	39-102041	B02 Bridge	G01 Garages; V	R04 Recreation Fa	06 Architect, 07 Biolo	Architect/Engine	155	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch	Kohrs, Lonnemann, I	61-070018	A06 Airpo	H09 Hospital ar	O01 Office Buildi	02 Administrative, 13	Architect/Engine	130	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch	Geotechnical Consul	31-096079	B02 Bridge	H07 Highways;	O01 Office Buildi	02 Administrative, 15	Architect/Engine	155	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch	Go Sustainable Ener	20-541071	C10 Comm	H09 Hospital ar	O01 Office Buildi	02 Administrative, 42	Architect/Engine	195	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch	Bennett Engineering	31-178118	C06 Churc	F03 Fire Protec	O01 Office Buildi	02 Administrative, 21	Architect/Engine	163	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch	HAWA Incorporated	31-064548	A11 Audit	F03 Fire Protec	O01 Office Buildi	02 Administrative, 08	Architect/Engine	120	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch	SMBH, Inc.	31-081418	A08 Anim	F02 Field Hous	O01 Office Buildi	02 Administrative, 08	Architect/Engine	145	No	250,000.00	0	0	0	250,000.00	Franklin	Active
OFCC Arch	Shremshock Archite	31-102326	C10 Comm	F03 Fire Protec	O01 Office Buildi	02 Administrative, 06	Architect/Engine	165	No	250,000.00	0	0	0	250,000.00	Franklin	Active

Consultant Reservation

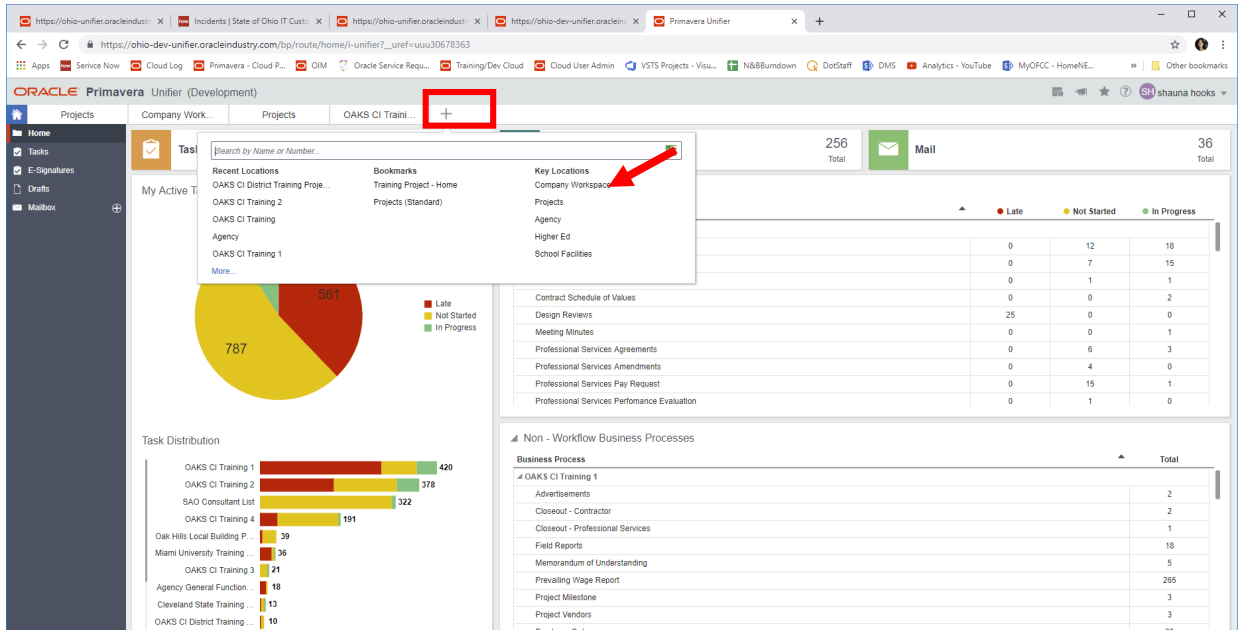
The Agency Consultant Coordinator(ACC) will:

- Reserve Consultant(s) to ensure their capacity is blocked for usage
  - *Reservations update nightly (once reservation is created, it will reflect in the OAKS CI Vendor report the next business day)*
  - *A reservation must be created for each project utilizing a consultant from the list*

Create Reservation for Consultants

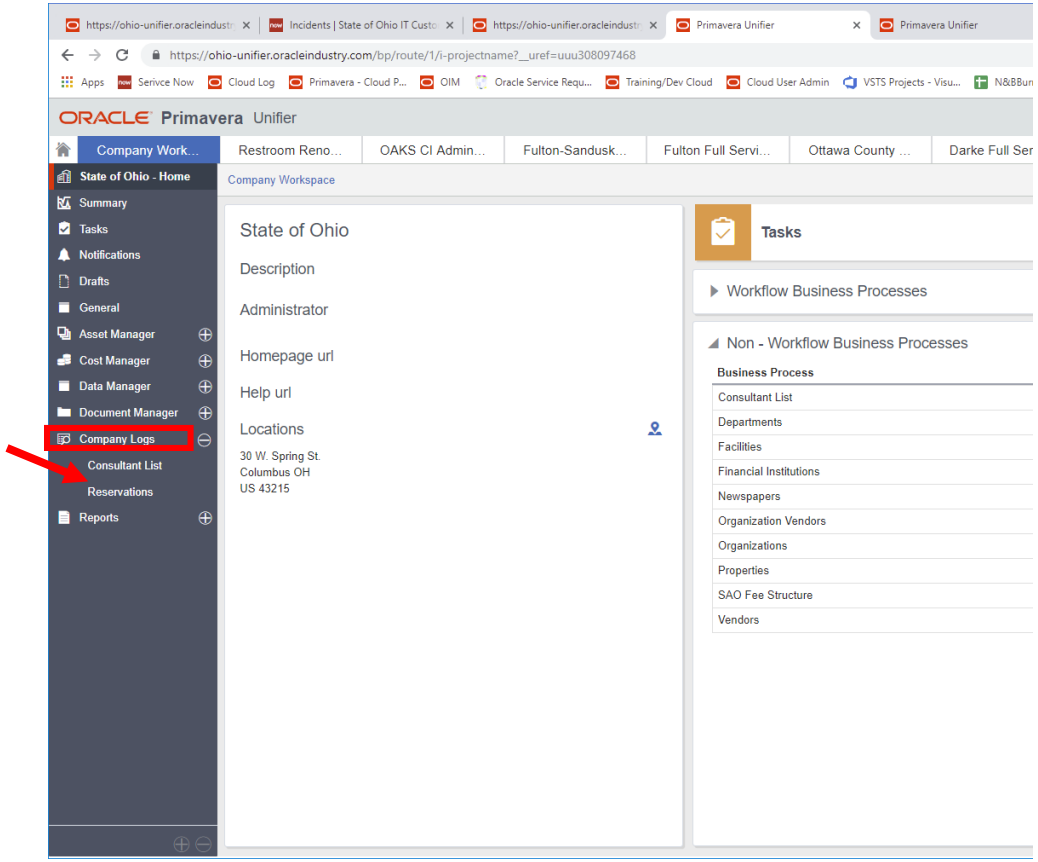
- In order to reserve a Consultant from the Consultant List, you must create a Reservation record in OAKS CI
- Log into OAKS CI
  - Click the + sign
    - Click Company Workspace

Please note: The reservation is created in Company Workspace not in your project



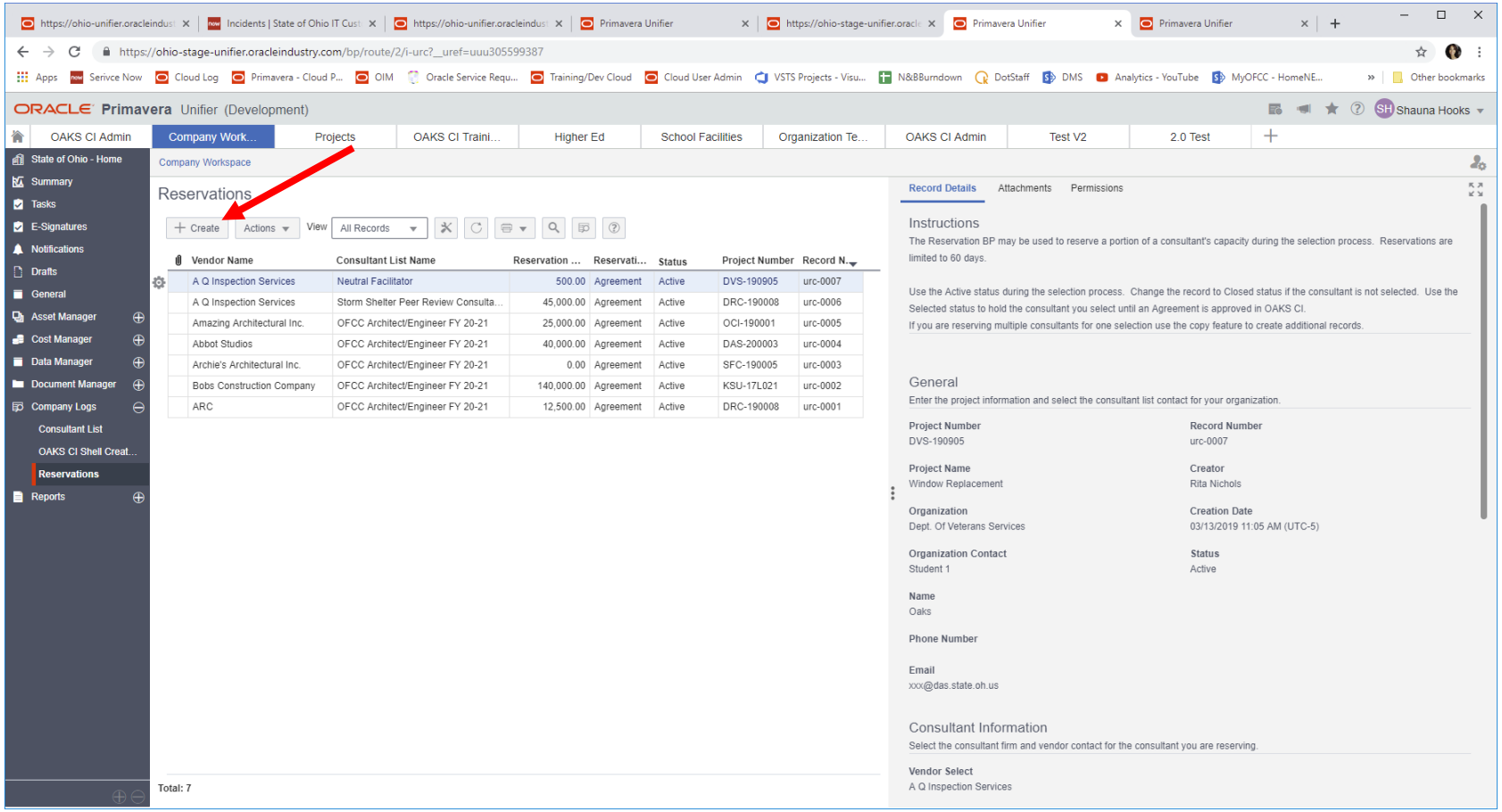
Create Reservation for Consultants

- Click **Company Logs**
  - Select **Reservations**



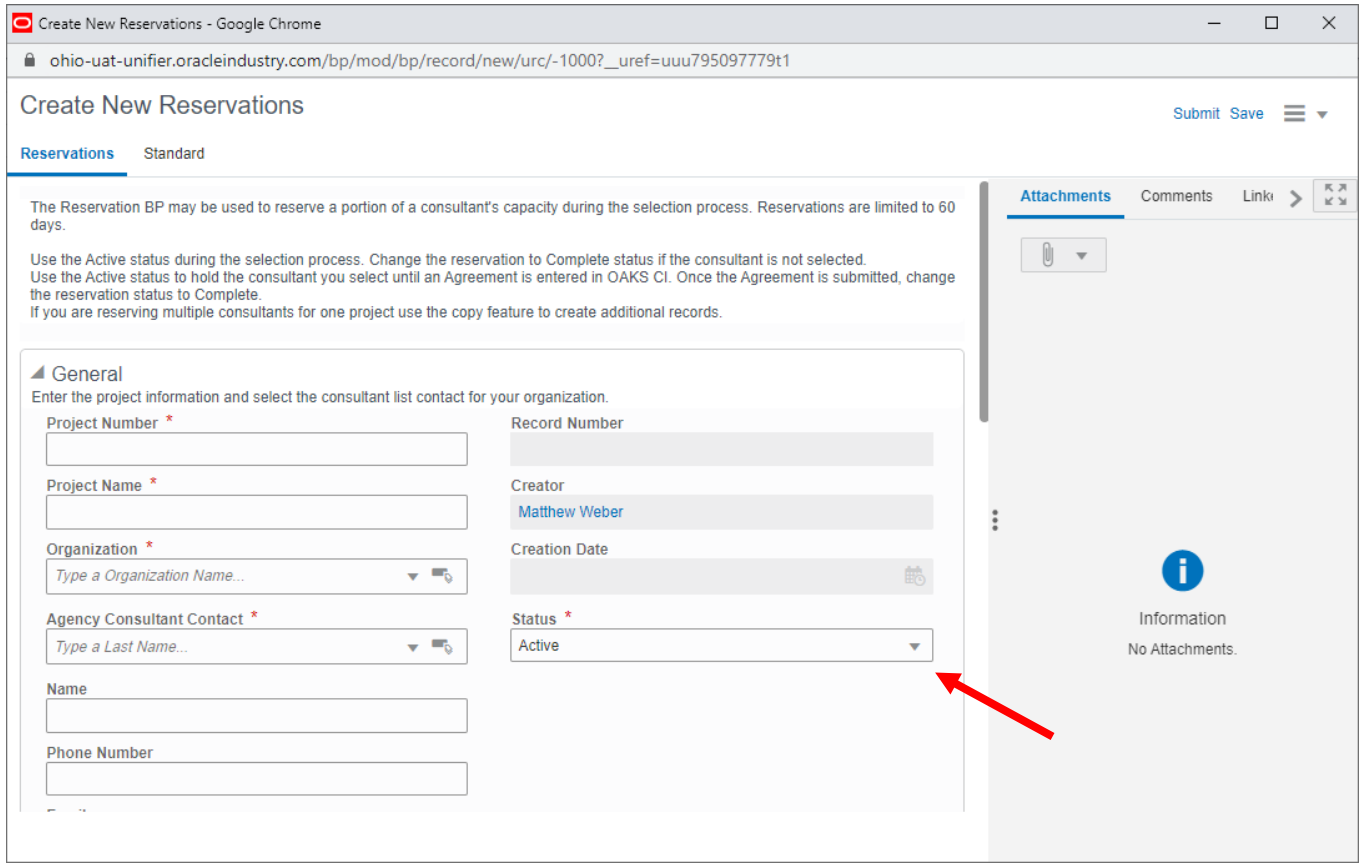
Create Reservation for Consultants

- Click **Create**



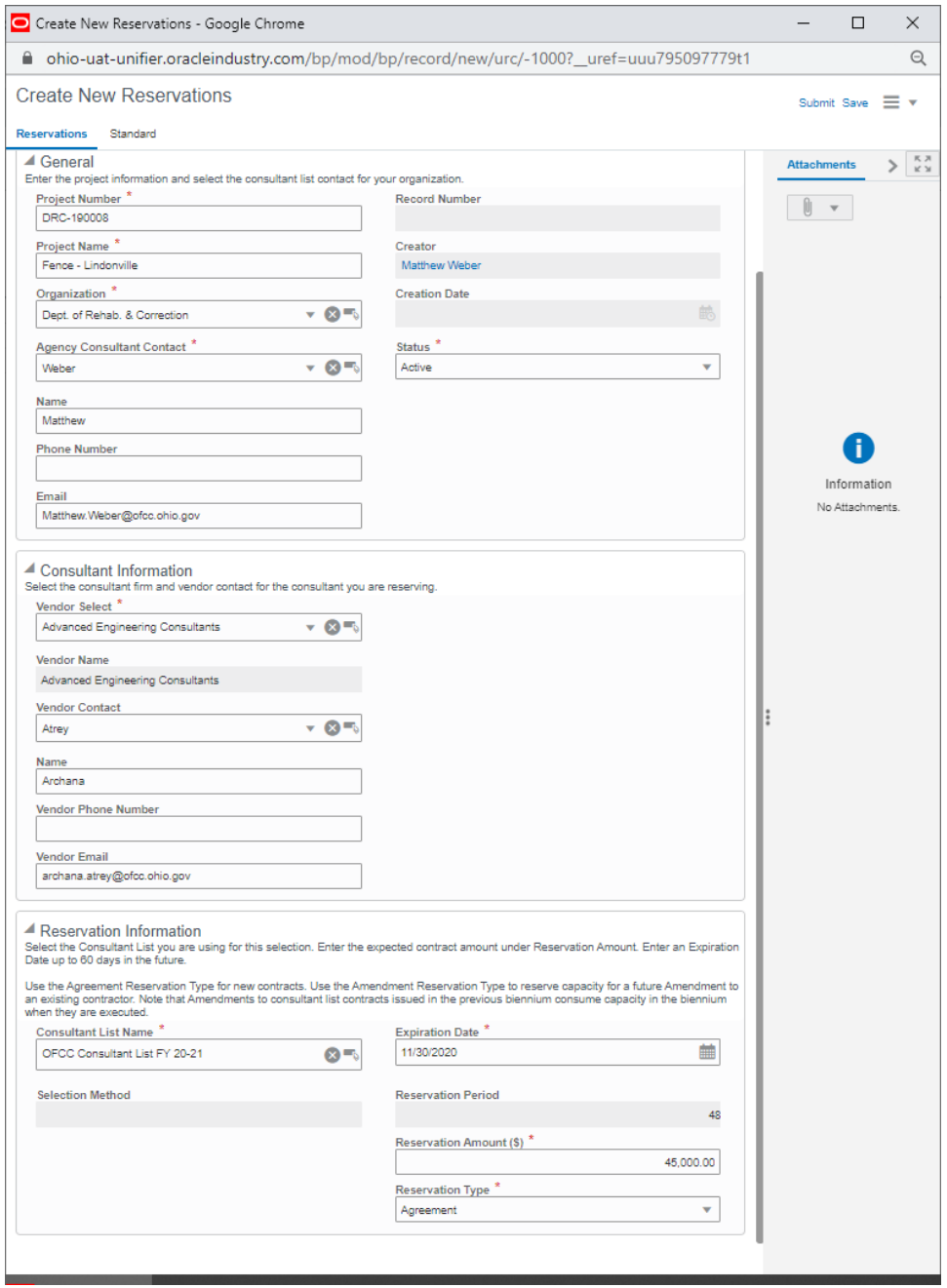
Create Reservation for Consultants

- Complete form by following instructions, all * fields are mandatory
- Use Active status during selection process
- Click **Submit** when complete



Create Reservation for Consultants

- Sample of Completed Reservation



Create Reservation for Consultants

- If there are no firms interested in your project opportunity, release reservations for each consultant in OAKS CI
  - Follow up with Project Team in order to attain new firms to pursue
  - Create new Reservations

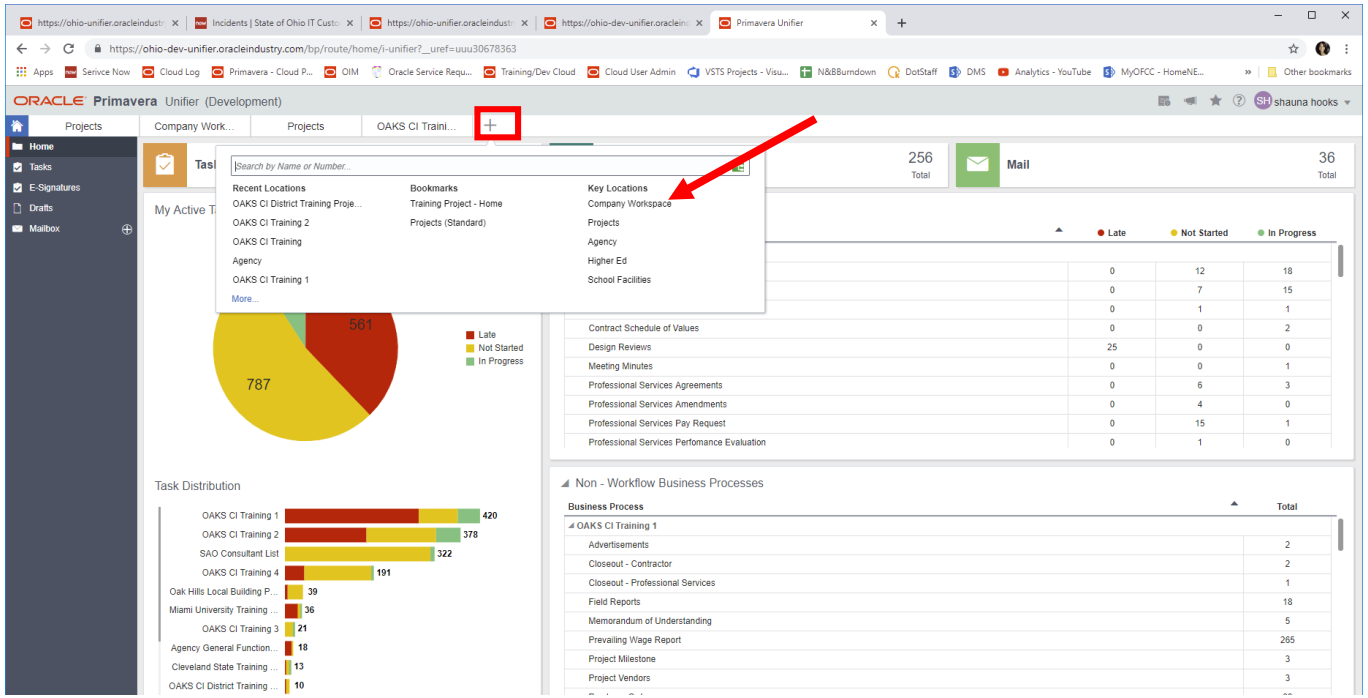
Release Reservation

- The ACC must release the reservation:
  - For any Consultant(s) not selected or not interested
  - Once an Agreement has been initiated for the chosen consultant

Release Reservation

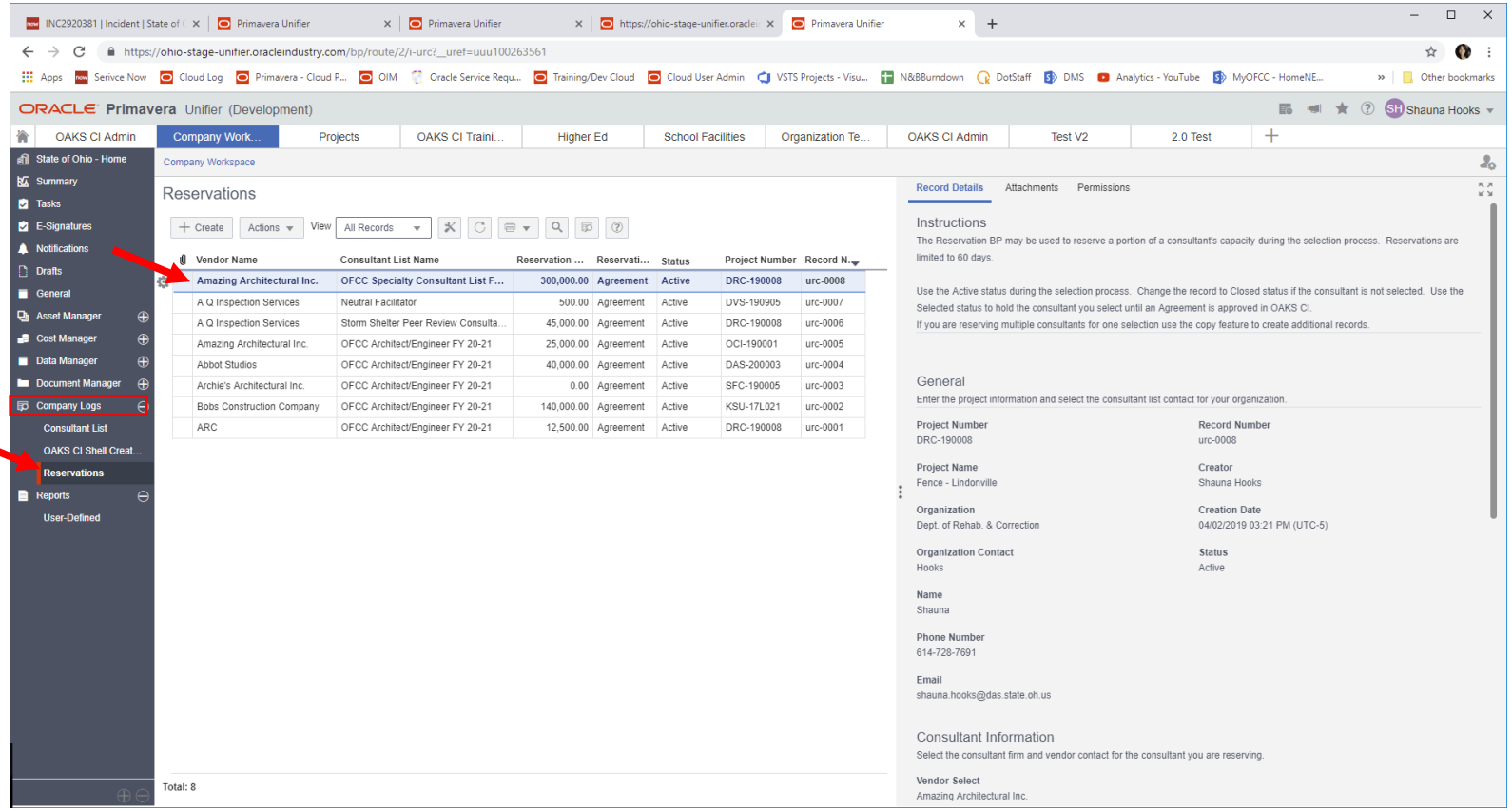
- You **must** release the reservation for any Consultant(s) not selected, and when the chosen consultant has an initiated agreement
- Log into OAKS CI
  - Click the + sign
    - Click Company Workspace

Please note: The reservation is released in Company Workspace not within your project



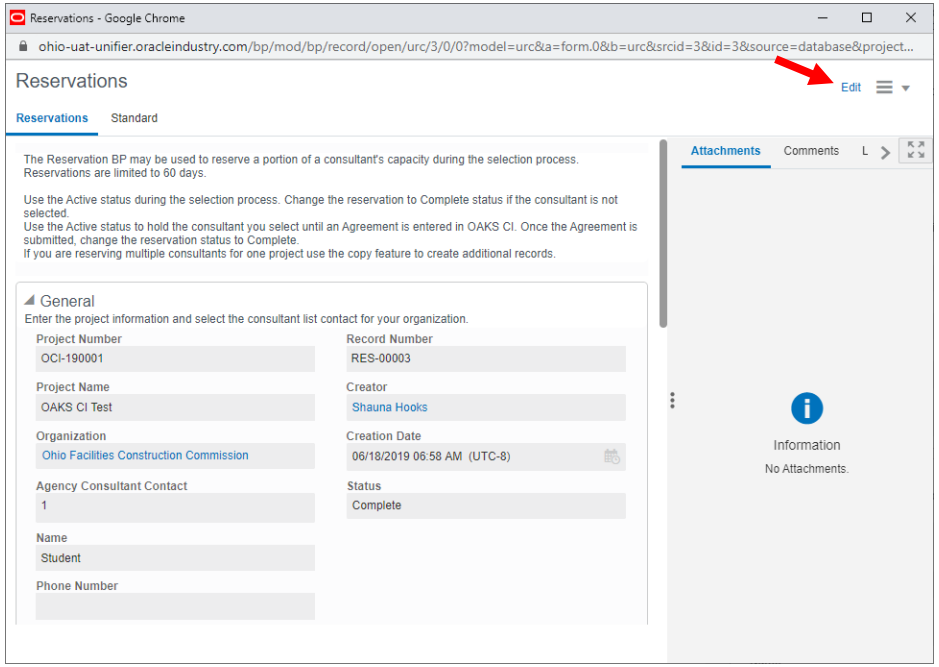
Release Reservation

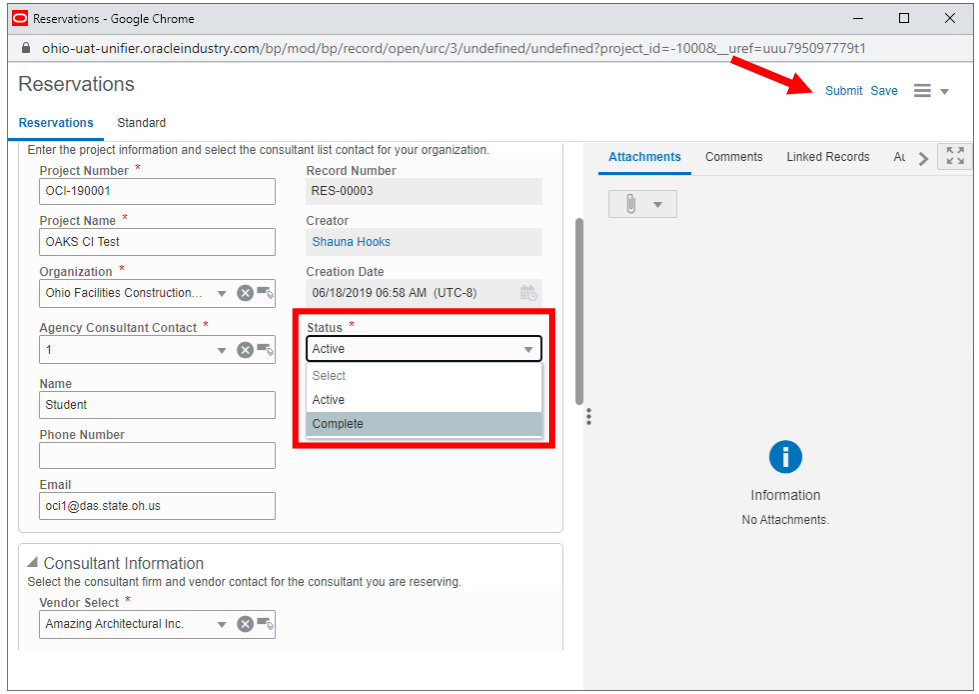
- Click Company Logs
  - Select Reservations
  - Double click the Reservation you wish to release



Release Reservation

- Click **Edit**
- Change Status from Active to Complete
- Click **Submit**





Release Reservation

- Release each reservation for each consultant in OAKS CI, not chosen.
- Release the reservation for the chosen consultant once the Agreement has been created

Consultant Vendor Record

The Consultant Vendor record must be in the project prior to the creation of the Professional Services (PS) (Consultant) Agreement

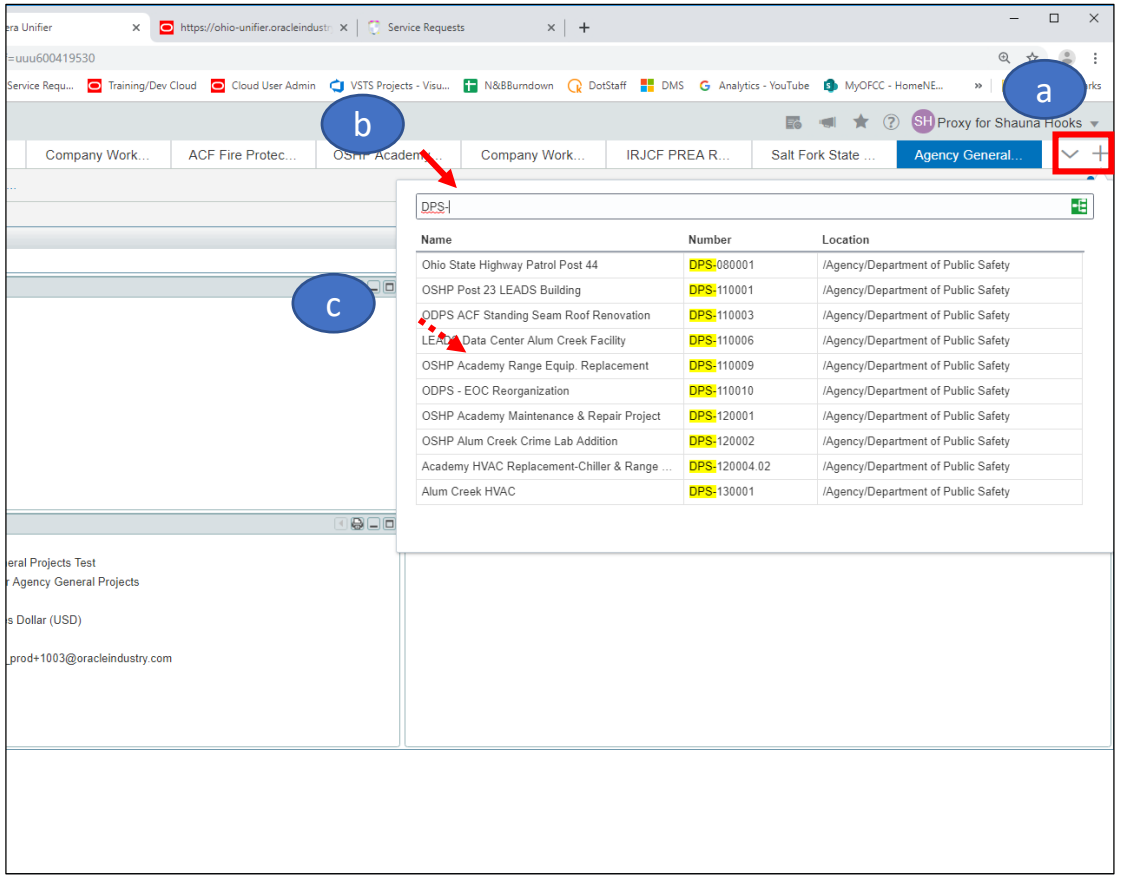
Create Vendor Record (PC)

- Log into OAKS CI

  a. Click + sign

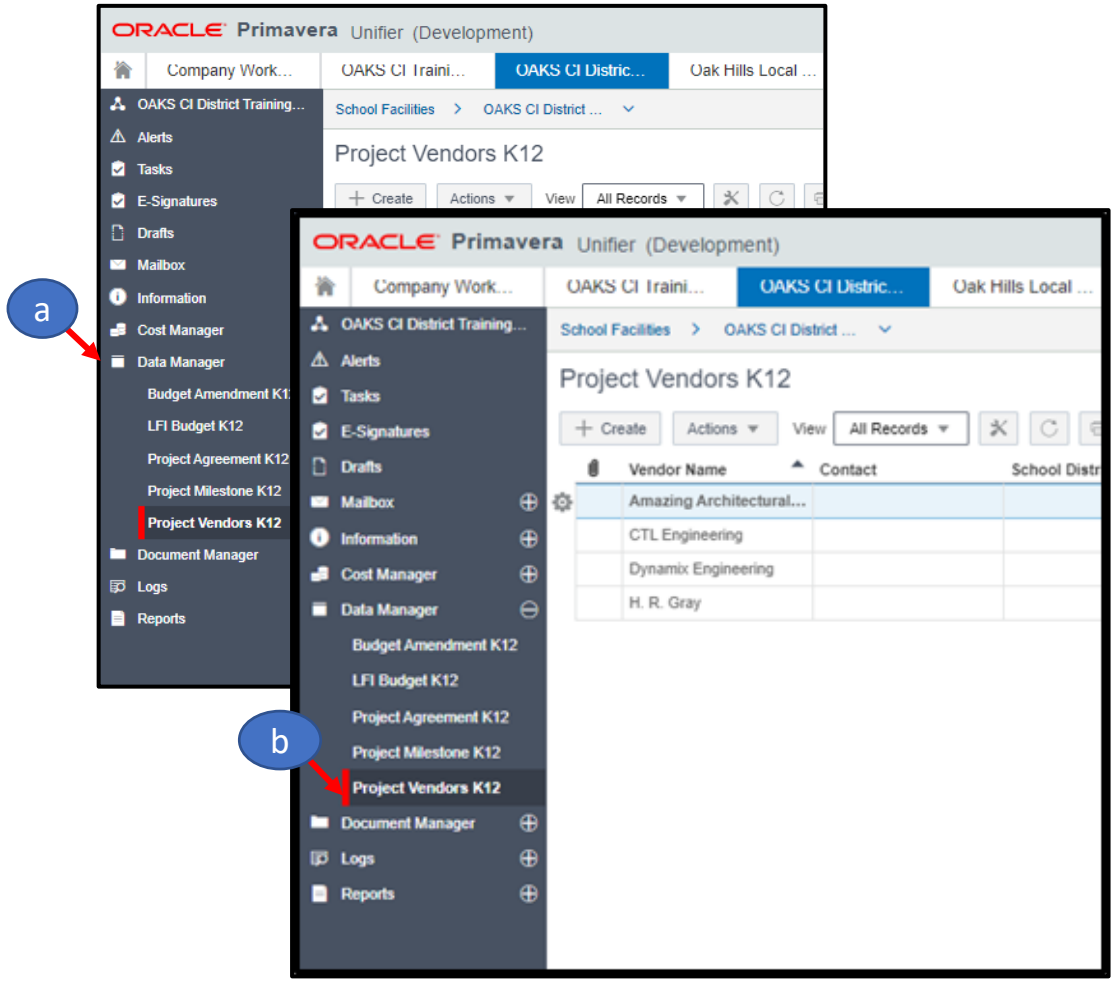
  b. Type project name or number in search bar

  c. Click appropriate project to open



Create Vendor Record (PC)

- Once in your project:
  - **a.** Click Data Manager
  - **b.** Click Project Vendors K12



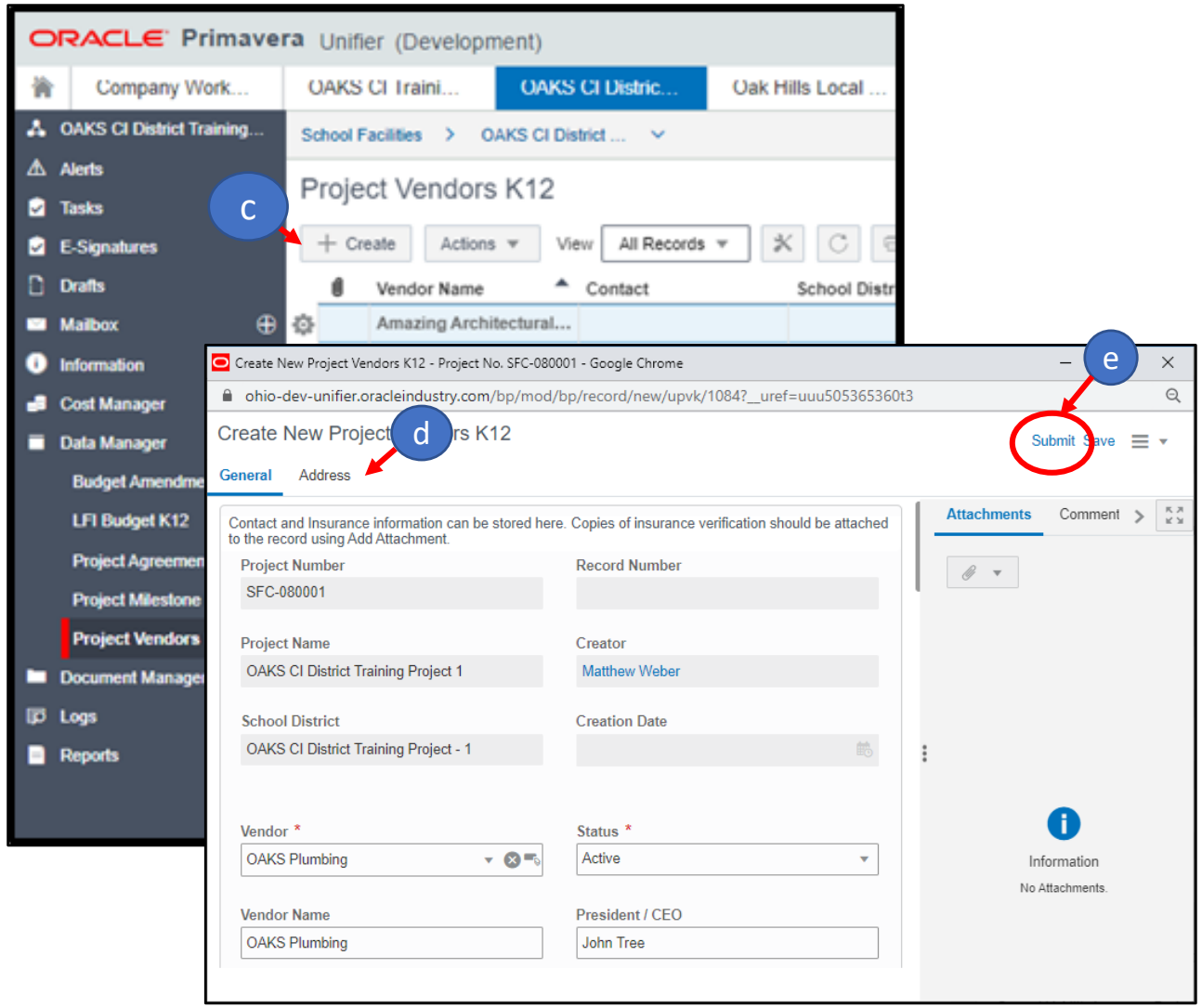
Create Vendor Record (PC)

c. Click **Create** to open a new record

Complete all fields

d. Click Address tab to update Vendor address

e. Click **Submit**



Professional Services (Consultant) Agreement

Create, Review, and Approve Agreement

Professional Services (Consultant) Agreement Purpose

- This Business Process (BP) utilizes the information presented in the Technical Proposal to develop the contract language and fee requirements for the Professional Services (Consultant) Agreement.
- Upon completion of this BP, the Professional Services Provider (Consultant) receives:
  - A contract
  - Authorization to proceed with the work
- The Professional Services (Consultant) Agreement BP also establishes the Schedule of Values (SOV) for Professional Services (Consultant) Pay Requests.

Consultant Agreement

- Prior to creating a Professional Services (Consultant) Agreement record in OAKS CI:
  - Ensure that you have closed the reservations for the Consultants not chosen
  - Ensure that you have submitted a signed OAKS CI Request for Access form for the chosen Consultant to the OAKS CI Support team.
  - Ensure that you have added the Consultant to the project, via the Project Vendor record

Professional Services (Consultant) Agreement Agency Consultant Coordinator (Create)

- Agency Consultant Coordinator (ACC) will:
  - Initiate the Professional Services (Consultant) Agreement
    - Create and attach the Custom Print
    - Attach all finalized documents :
      - Final Negotiated Technical/fee proposal
      - Clean search of State Auditor (State Auditor website)
      - Exhibit A: Consultant Standard Terms and Conditions
      - Updated Exhibit B: Consultant Scope of Services (with updated schedule, if needed)
      - Attach the previously uploaded documents by Consultant*

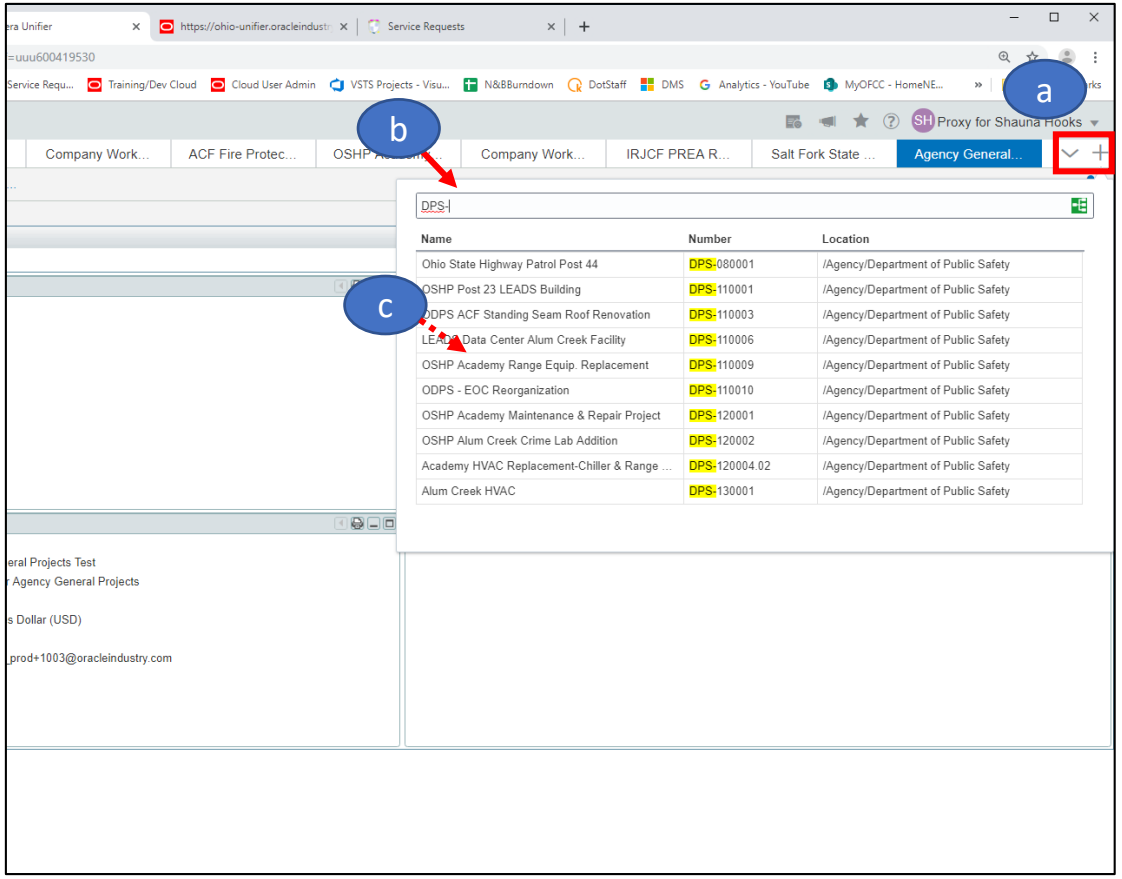
Professional Services (Consultant) Agreement Agency Consultant Coordinator (Create)

- Log into OAKS CI

  a. Click + sign

  b. Type project name or number in search bar

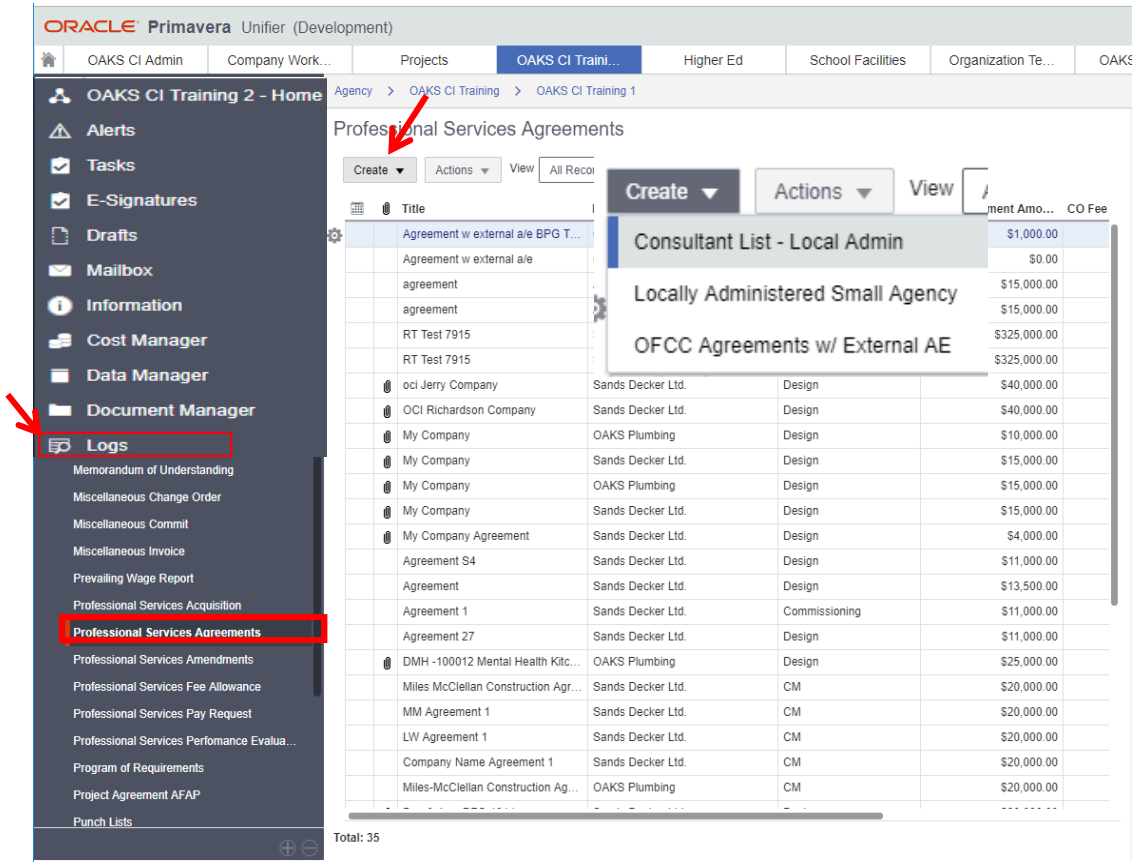
  c. Click appropriate project to open



Professional Services (Consultant) Agreement Agency Consultant Coordinator (Create)

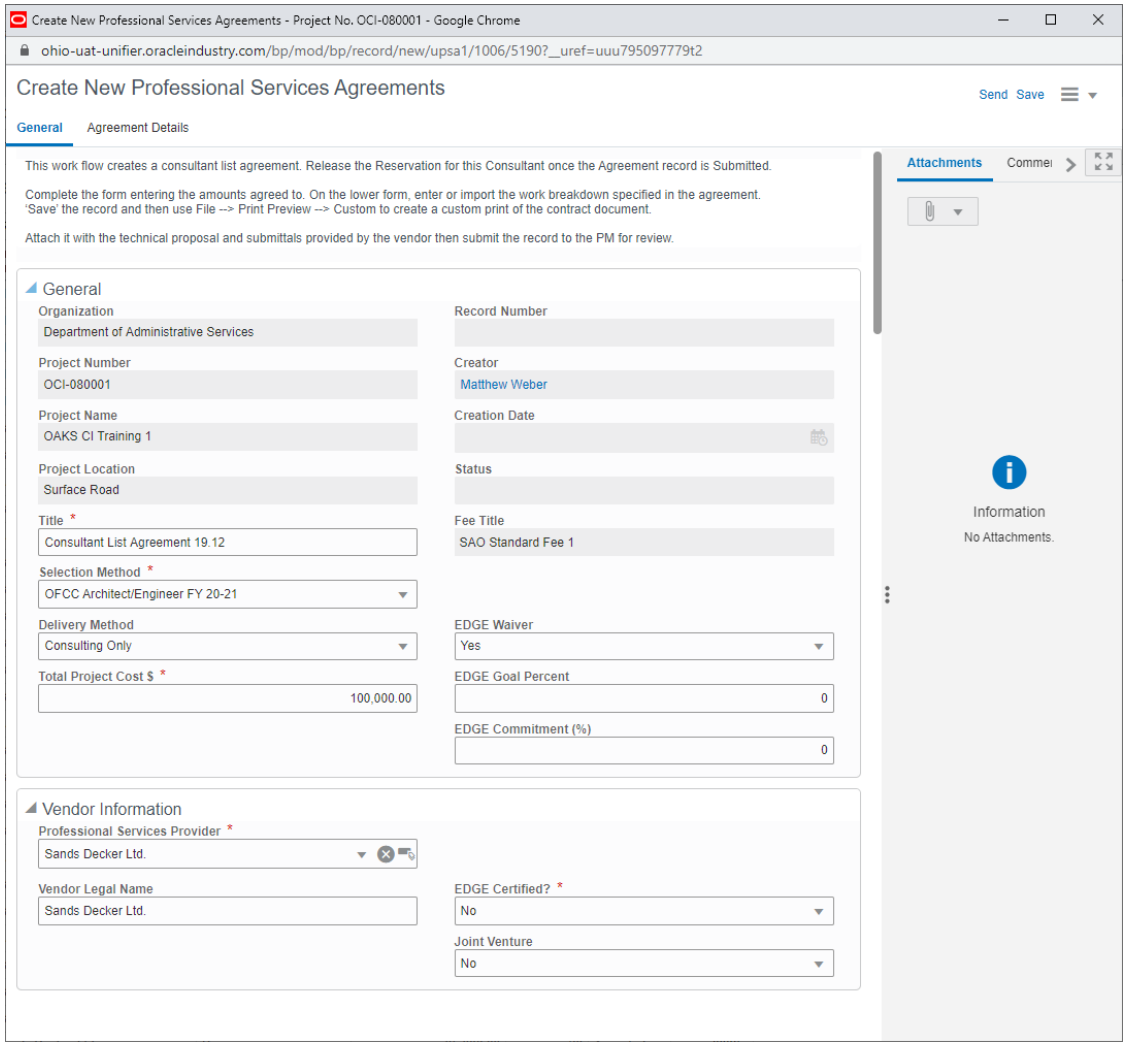
- Click Logs
- Select - Professional Services Agreements
- Click Create

  - *If given a Workflow Option: Select -* ***Consultant List – Local Admin***



Professional Services (Consultant) Agreement Agency Consultant Coordinator (Create)

- Each section of the record requires entry of relevant information.
  - Complete fields in the **General** tab as appropriate

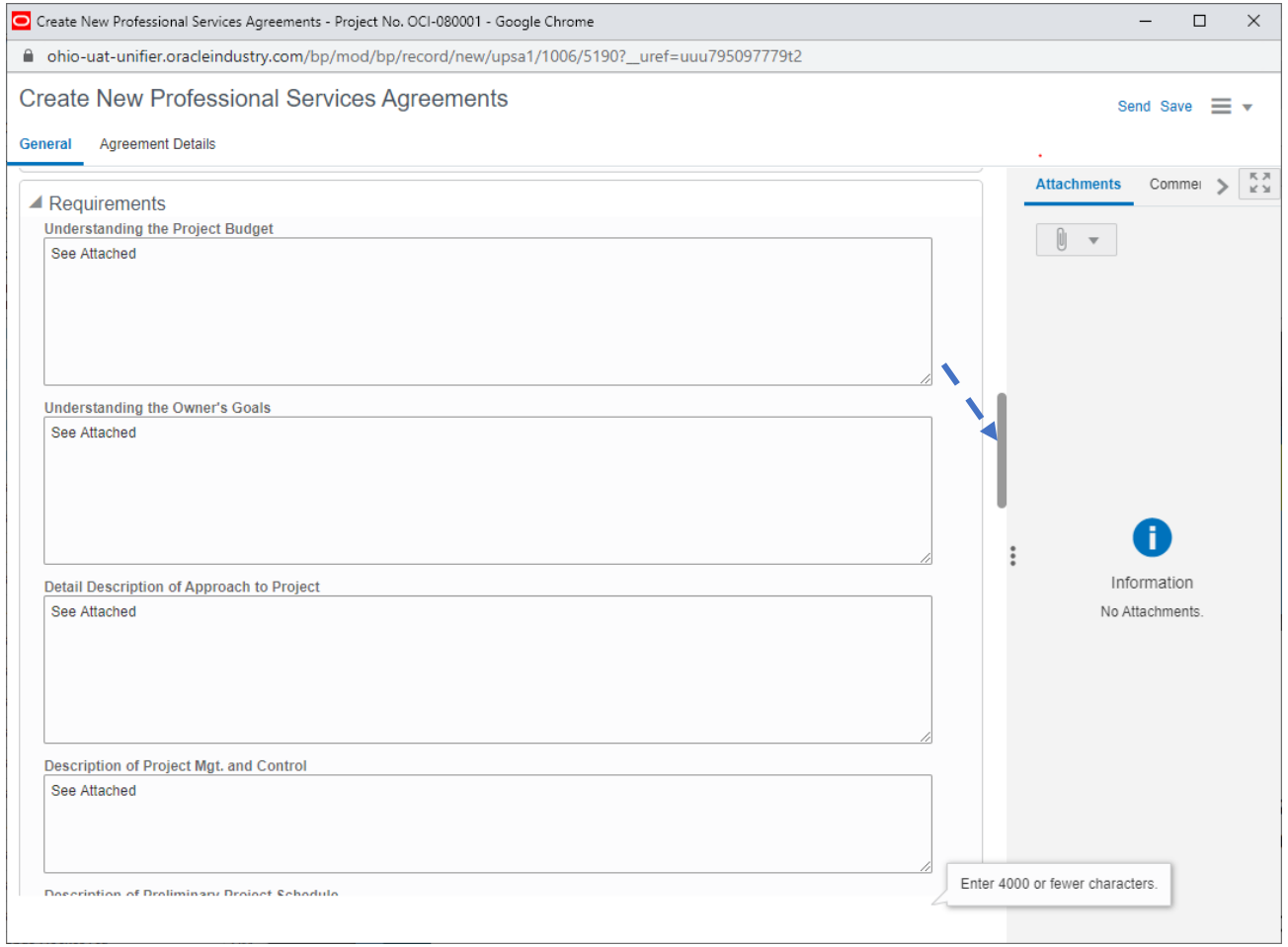


Professional Services (Consultant) Agreement Agency Consultant Coordinator (Create)

Scroll down page:

Requirements block

- Complete blocks – you may enter 'See Attached' if referenced documents are attached to the record



Professional Services (Consultant) Agreement Agency Consultant Coordinator (Create)

Scroll down page:

Fee Summary block:

- For each category in the Fee Summary block enter negotiated amounts.
  - **Line Item Amounts** and **Difference** fields are auto-populated

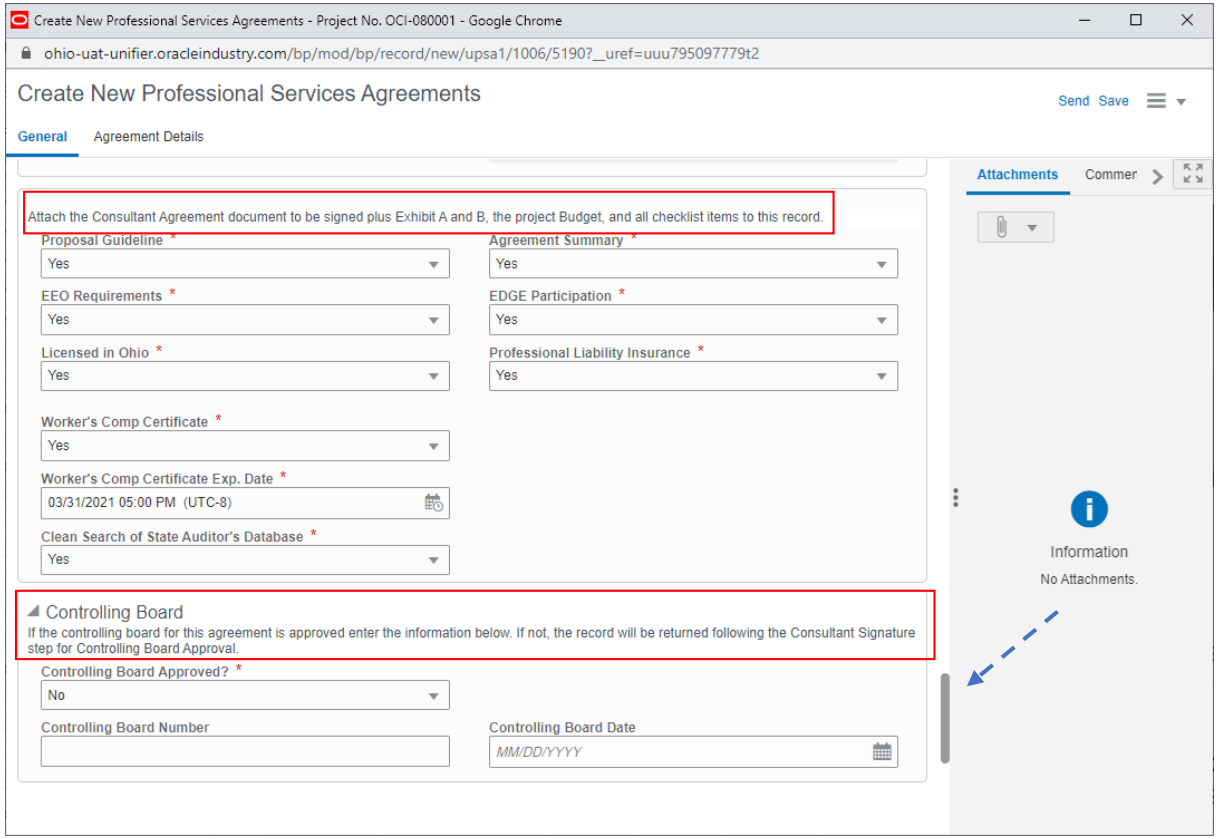
Professional Services (Consultant) Agreement Agency Consultant Coordinator (Add Details)

Scroll down form:

Agreement Checklist Block:
Complete all fields and be prepared to attach all required documents

Controlling Board Block:
If Controlling Board has been approved:
Select **Yes** and
Provide Controlling Board number and date

If Controlling Board has not been approved
Select **No**



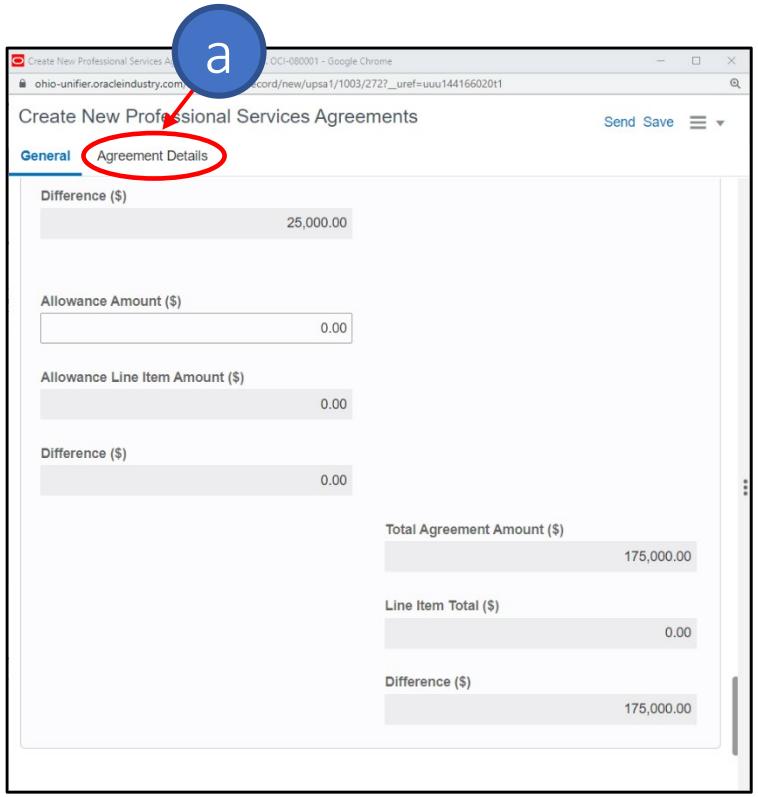
Professional Services (Consultant) Agreement Agency Consultant Coordinator (Add line items)

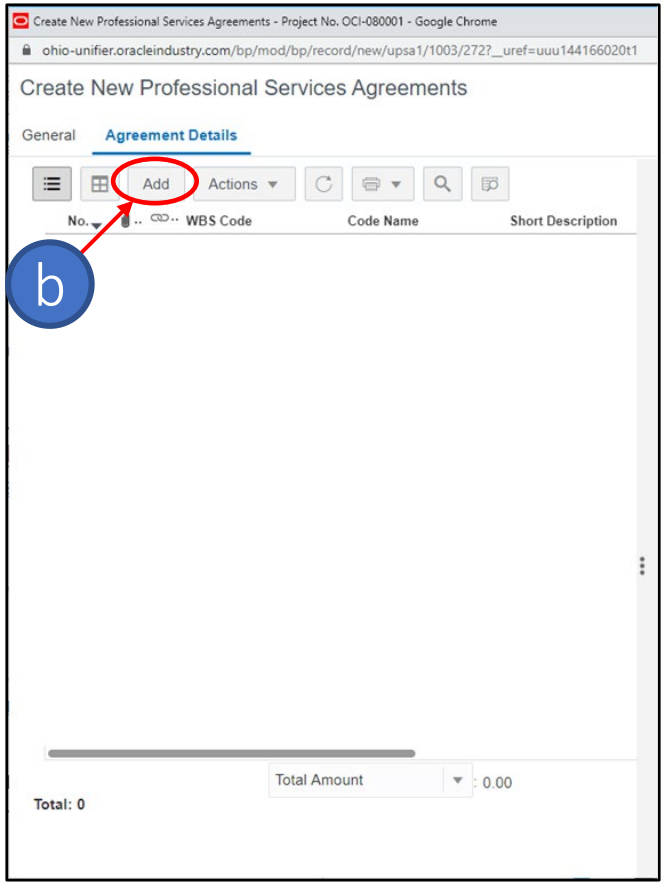
- Line items are used to develop the Schedule of Values agreed to in the technical proposal
- Once the Agreement is approved, the line items will form the basis for each PS (Consultant) Pay Request
- Add as many line items as necessary for this record to define the proposed compensation items

Professional Services (Consultant) Agreement Agency Consultant Coordinator (Add line items)

a) Open the **Agreement Details** Tab

b) Click **Add** to begin adding Line Items

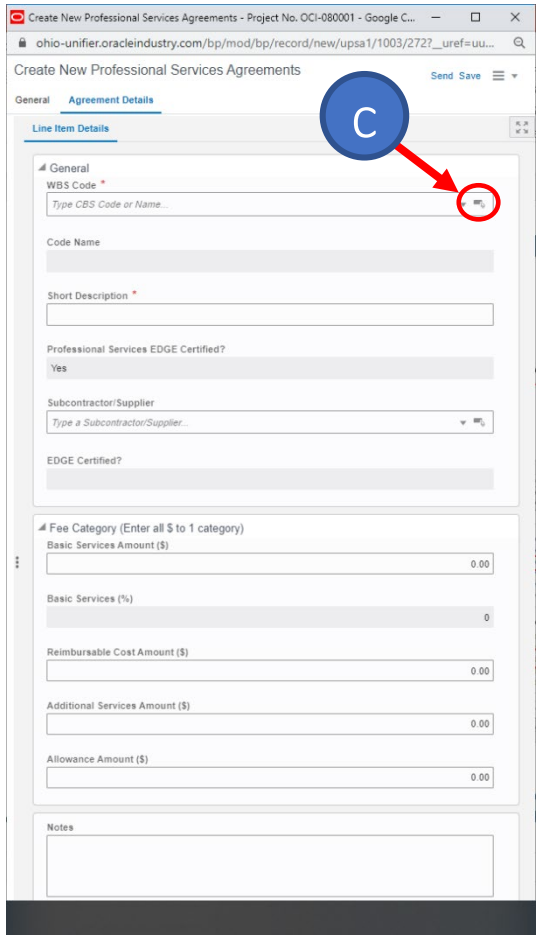


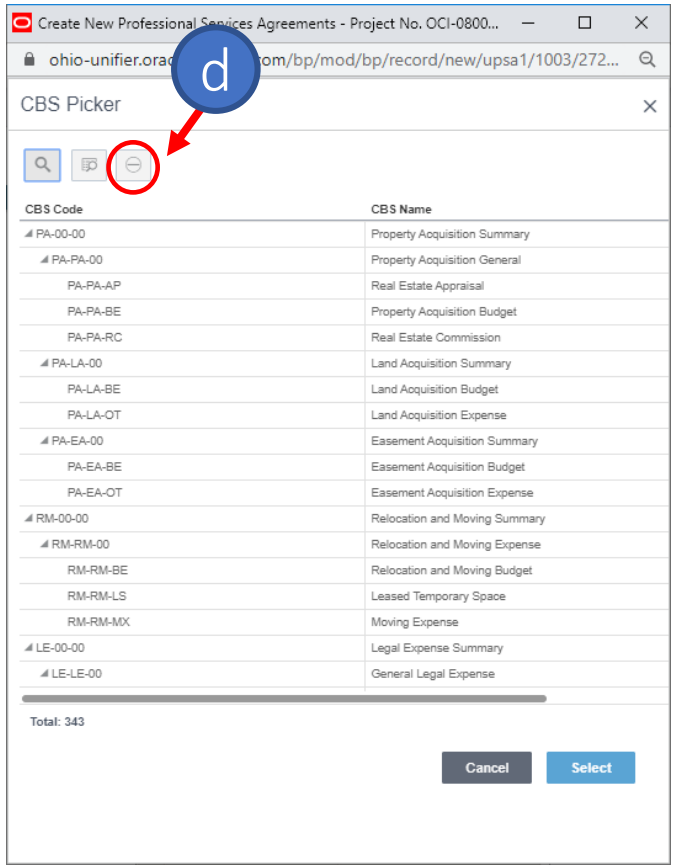


Professional Services (Consultant) Agreement Agency Consultant Coordinator (Add line items)

c) Click the **Select** button next to WBS Code

d) In the new window, click the Collapse button





Professional Services (Consultant) Agreement Agency Consultant Coordinator (Add line items)

Frequently Used Line items for **Basic Services**

Description	WBS Code
1) Pre-Design Services	AE-BS-PD
2) Schematic Design	AE-BS-SD
3) Design Development	AE-BS-DD
4) Construction Documents	AE-BS-CD
5) Bidding and Award services	AE-BS-BA
6) Conform Documents	AE-BS-CN
7) Construction Administration	AE-BS-CA
8) Closeout services	AE-BS-CL

Professional Services (Consultant) Agreement Agency Consultant Coordinator (Add line items)

Frequently Used Line items for **Additional Services** and **Reimbursables**

Description	WBS Code
1) Field Investigation	AE-AS-OT
2) Multiple Phases	AE-AS-OT
3) Testing (geotechnical or other)	AE-AS-TI
4) Printing	AE-RE-DP
5) Plan Approval and Permits	RF-GF-PP
6) Advertisement	AE-RE-OT
7) Special Inspections	AE-RE-OT

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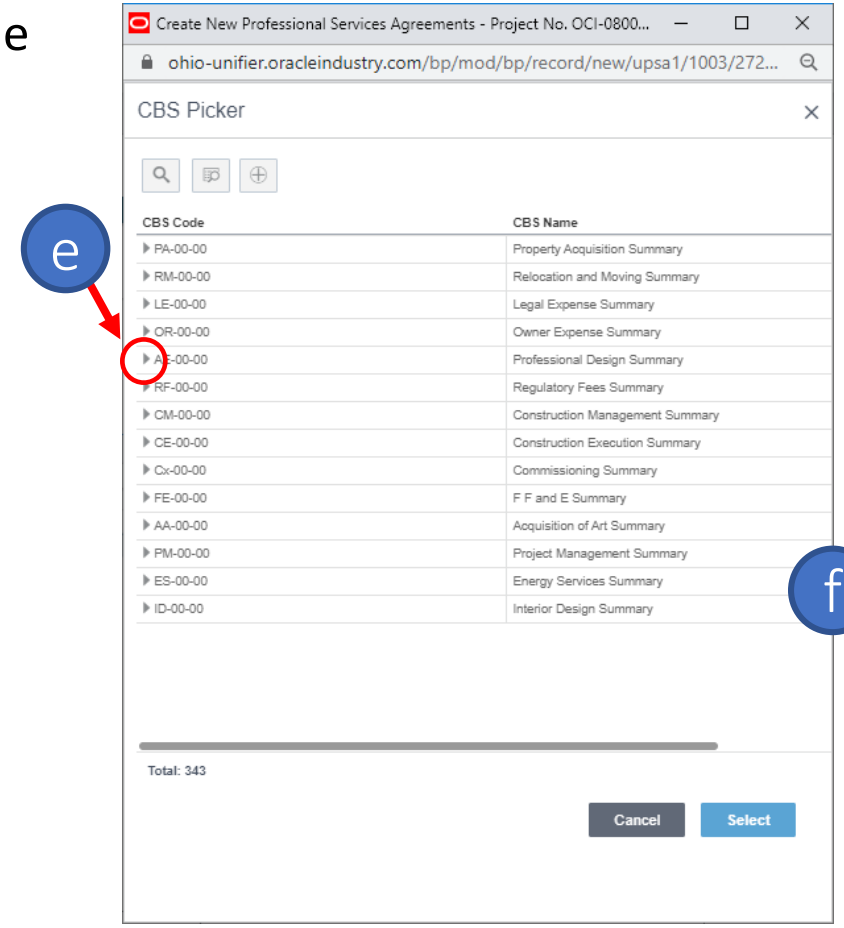
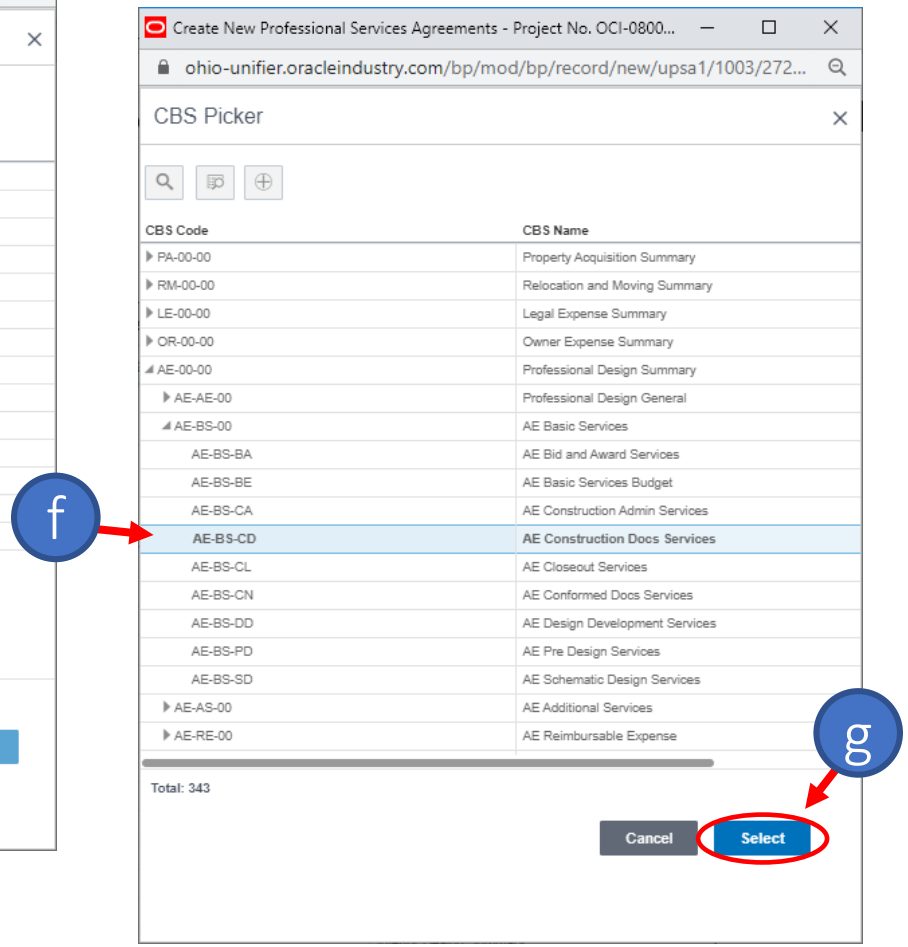
Professional Services Agreement

e) Click the arrow next to the AE Line

f) Choose a category

g) Click **Select**





Professional Services Agreement

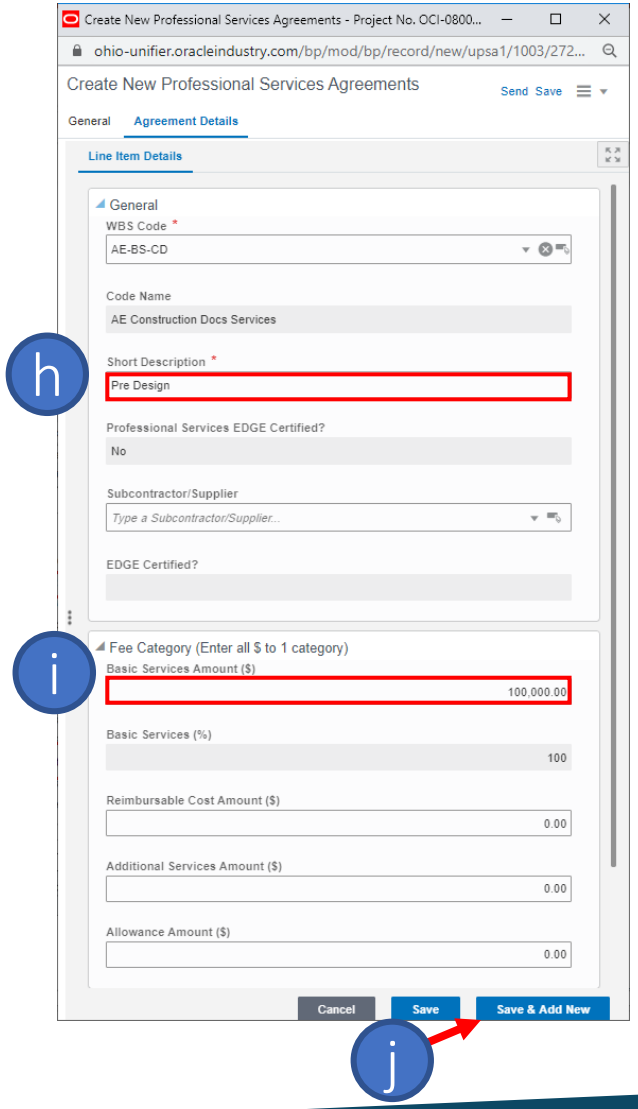
h) Enter a Short Description

i) Enter Fee Category Information

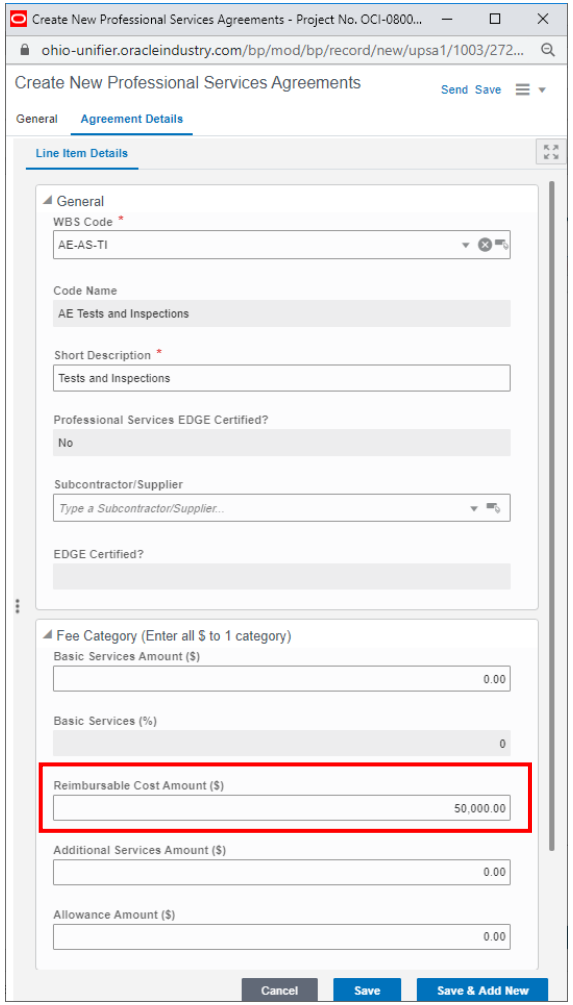
- See example Line Items to the right:
  - The Line Item in Example 1 identifies Basic Services
  - The Line Item in Example 2 falls under Reimbursable Costs
  - The record will not move forward if the amounts are in the incorrect Fee Category

j) Click “Save & Add New” to continue adding all necessary line

Example 1

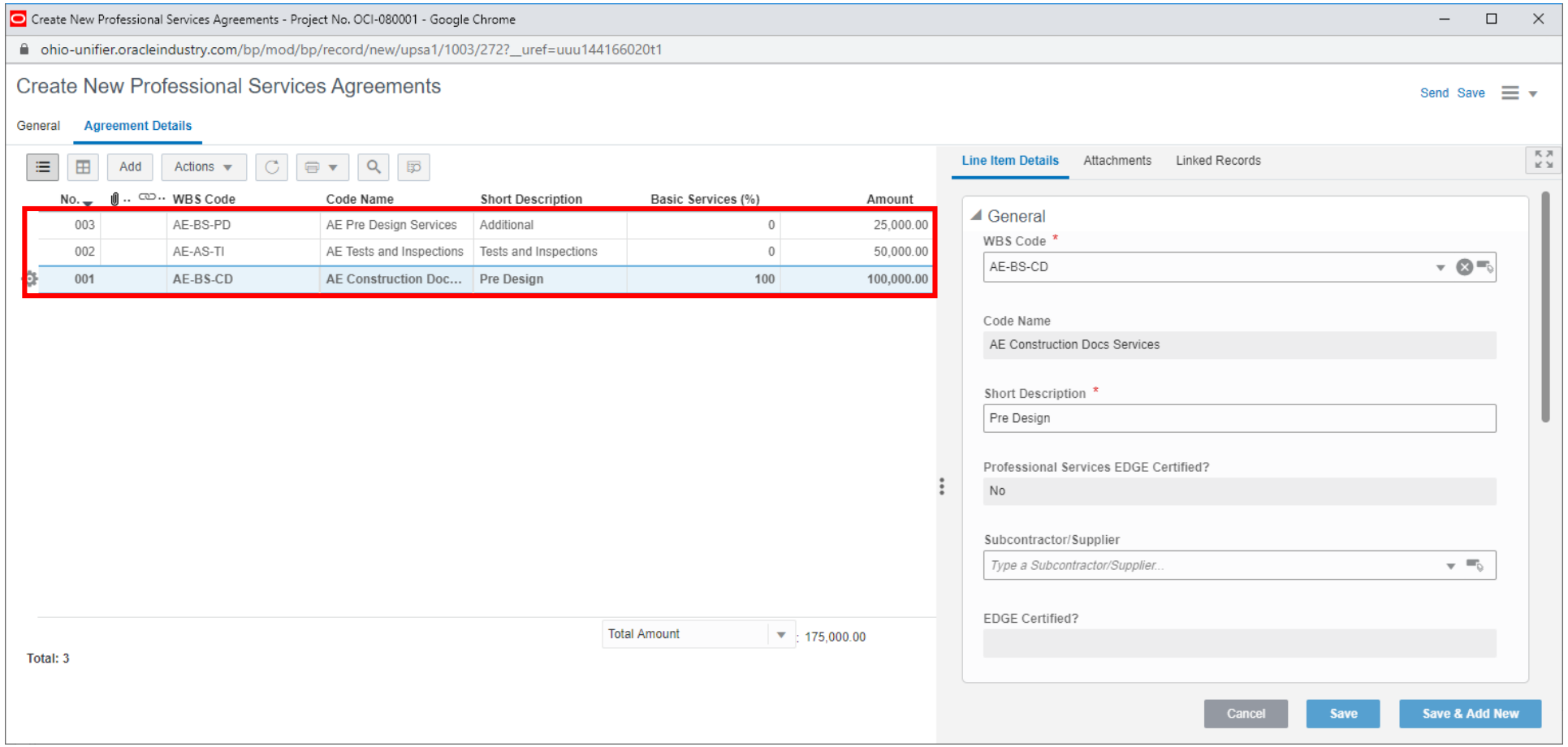


Example 2



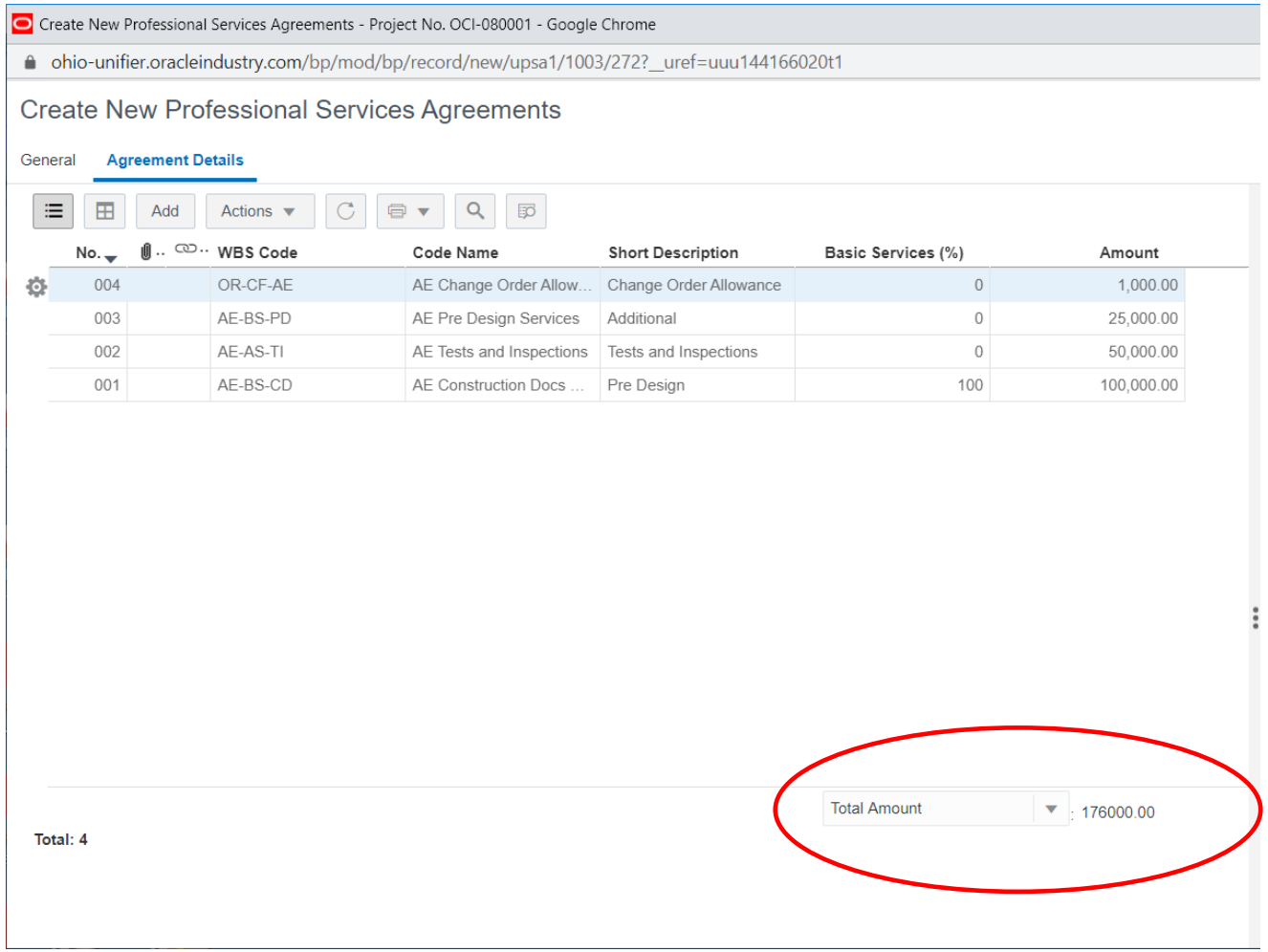
Professional Services Agreement

- Line Items will populate under Agreement Details
- Double click the line item to make adjustments



Professional Services Agreement

- When all line items have been added, take note of the **Total Amount** on the Agreement Details tab.
- This should match the Total Agreement Amount from the General tab and the Difference should be **$0.00** (see next slide)

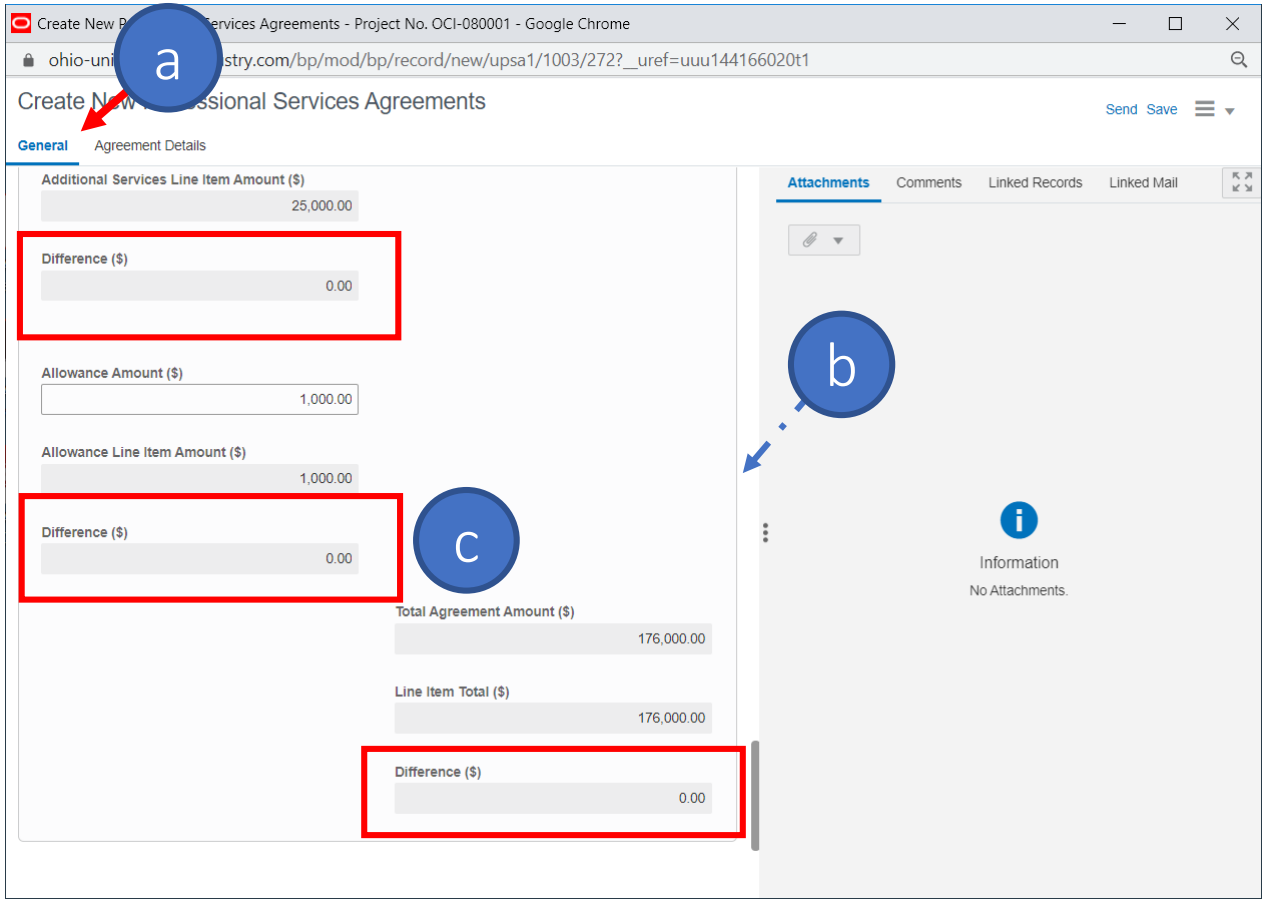


Professional Services Agreement

a) Open the **General** tab

b) Scroll down to the bottom of the Fee Summary section

c) Ensure the Total Agreement Amount is equal to the Line Item Total. The Difference in each category as well as the Total Difference must equal $0.00



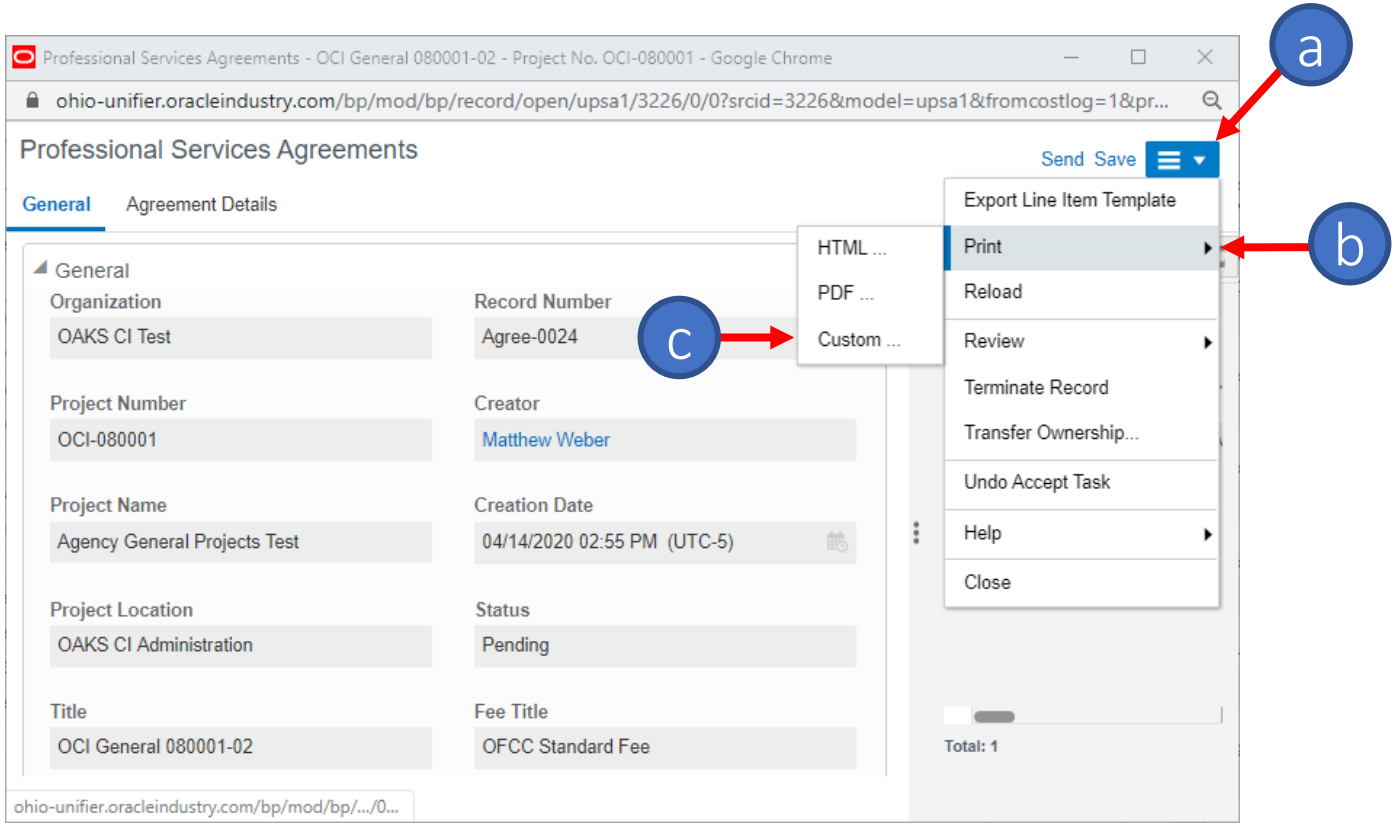
Professional Services (Consultant) Agreement Agency Consultant Coordinator (Create Custom Print)

Once record is complete:

a) Click the Menu at the top right of the record

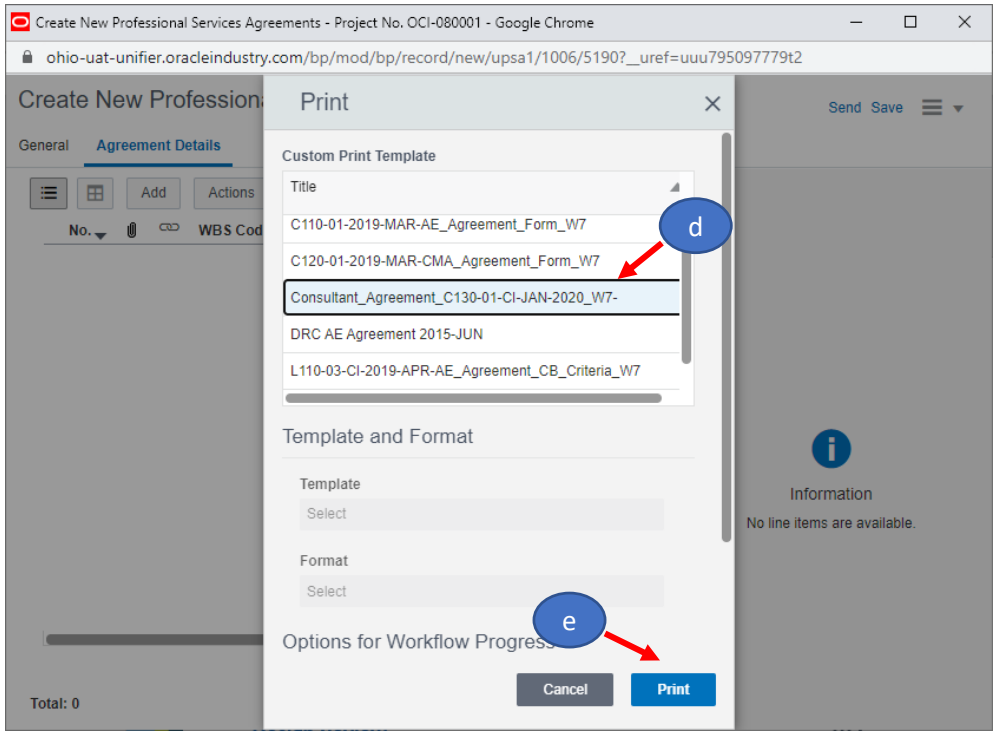
b) Click **Print**

c) Select **Custom**



Professional Services (Consultant) Agreement Agency Consultant Coordinator (Create Custom Print)

d. Select: Consultant Agreement
e. Click : **OK**

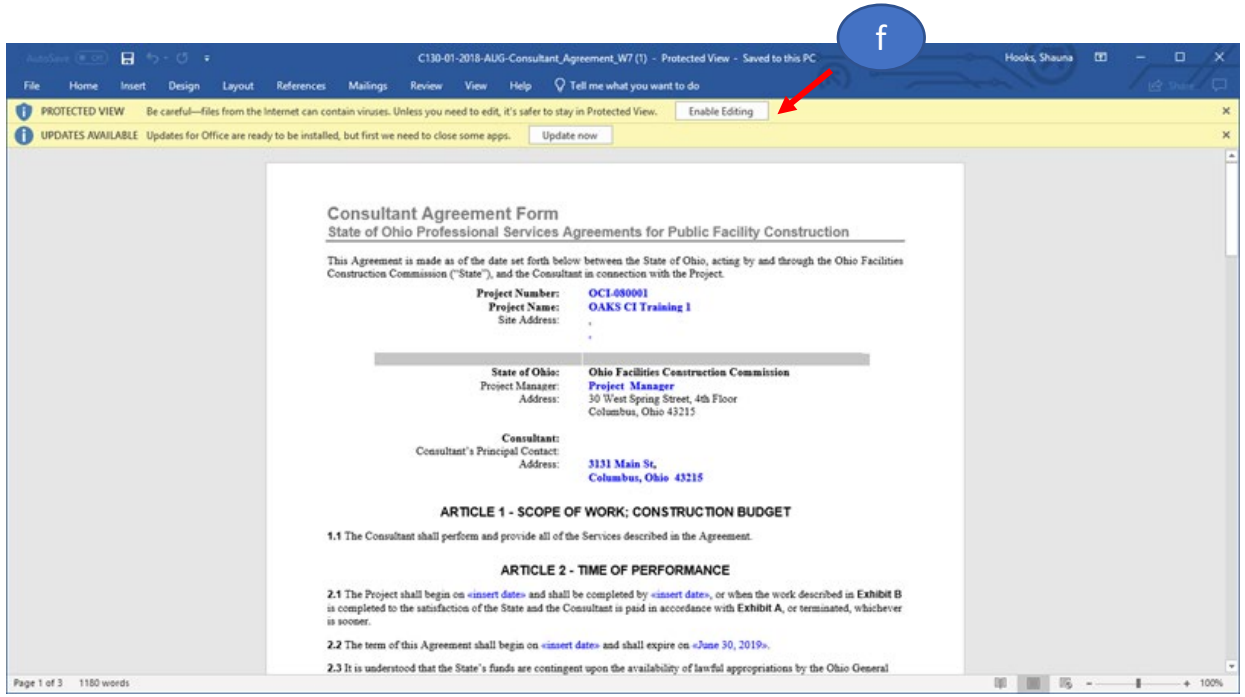


Professional Services (Consultant) Agreement Agency Consultant Coordinator (Create Custom Print)

Open the document

f. Click Enable Editing and update any necessary fields.

Once complete, Save the document to your computer



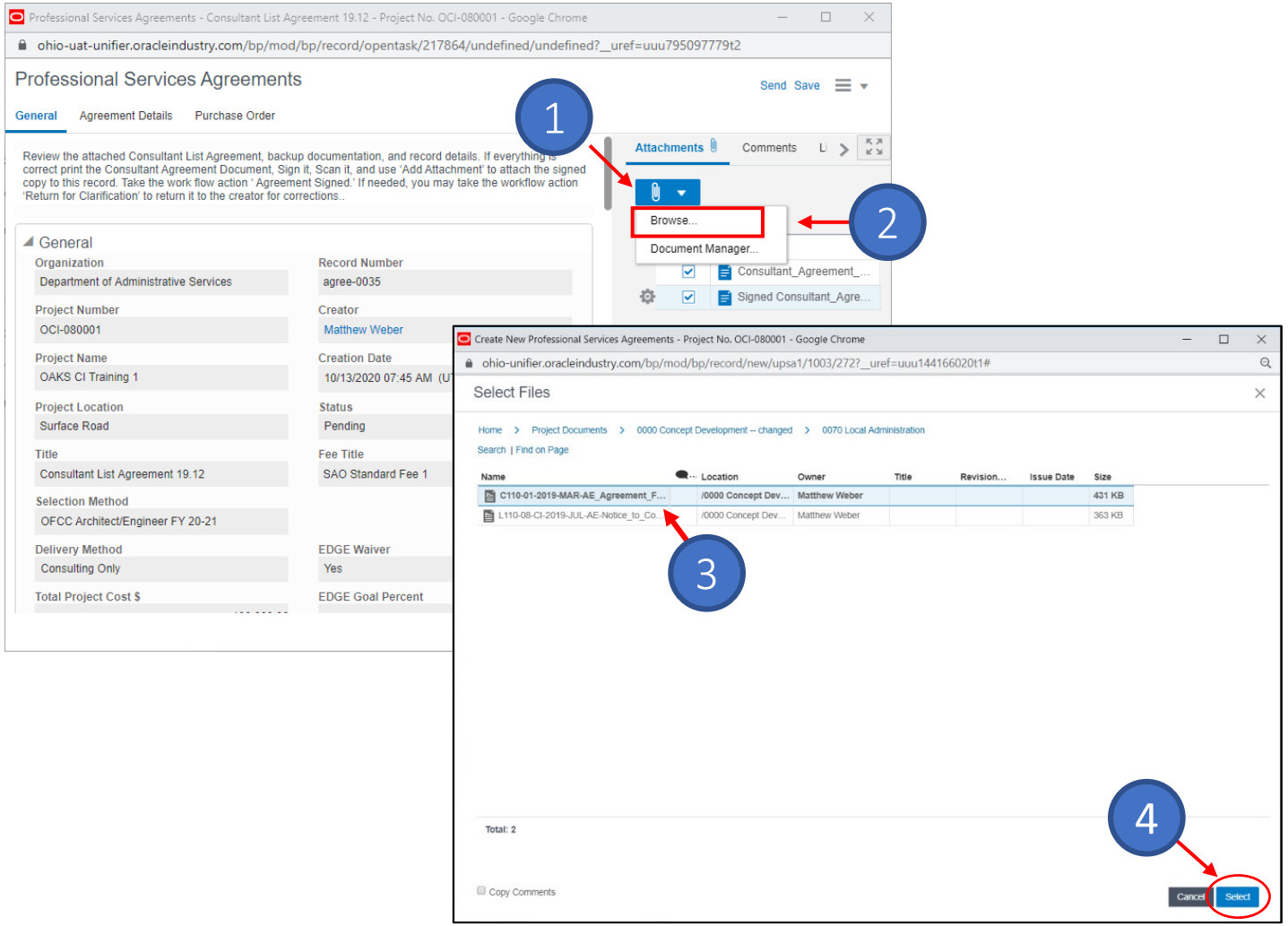
Professional Services (Consultant) Agreement Agency Consultant Coordinator (Create Custom Print)

1) Under the **Attachments** tab on the right side of the record, click the attachments button

2) Choose **Browse**

3) Navigate to the folder where the document is stored; select the document you wish to attach

4) Click **Select**

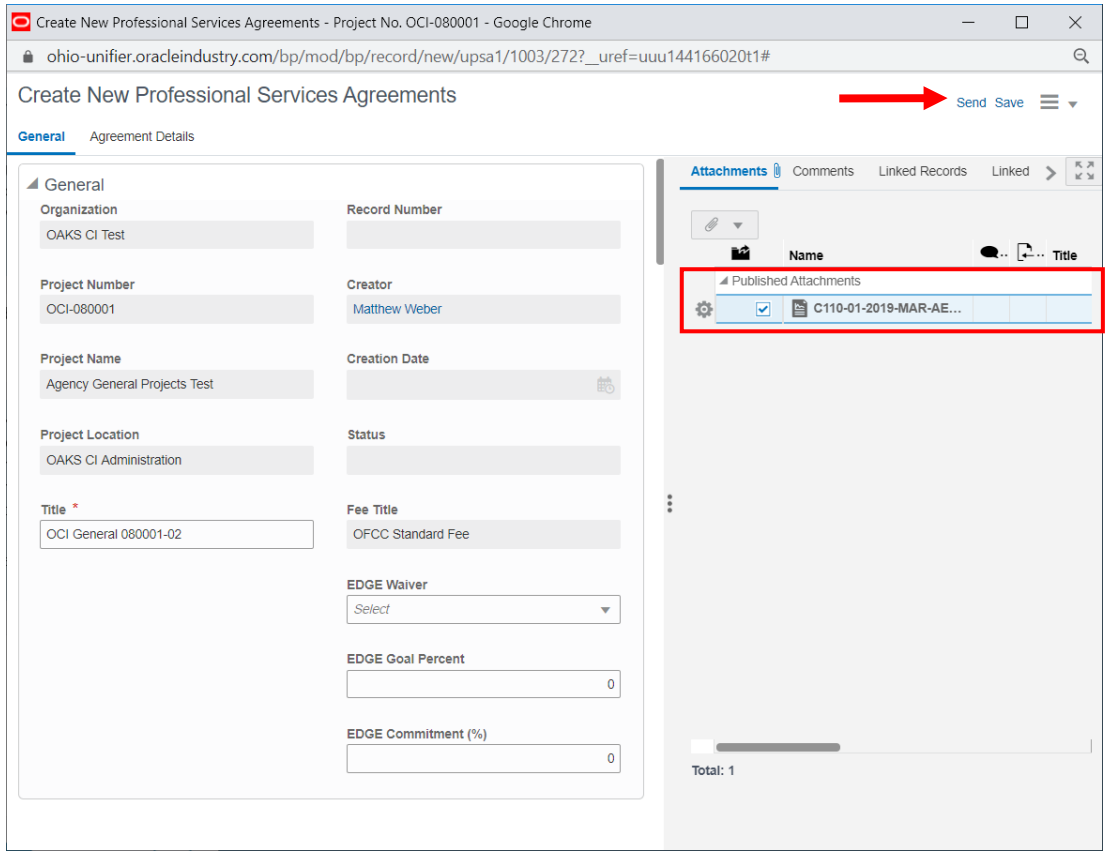


Professional Services (Consultant) Agreement Agency Consultant Coordinator (Create Custom Print)

The Document Manager screen will close:

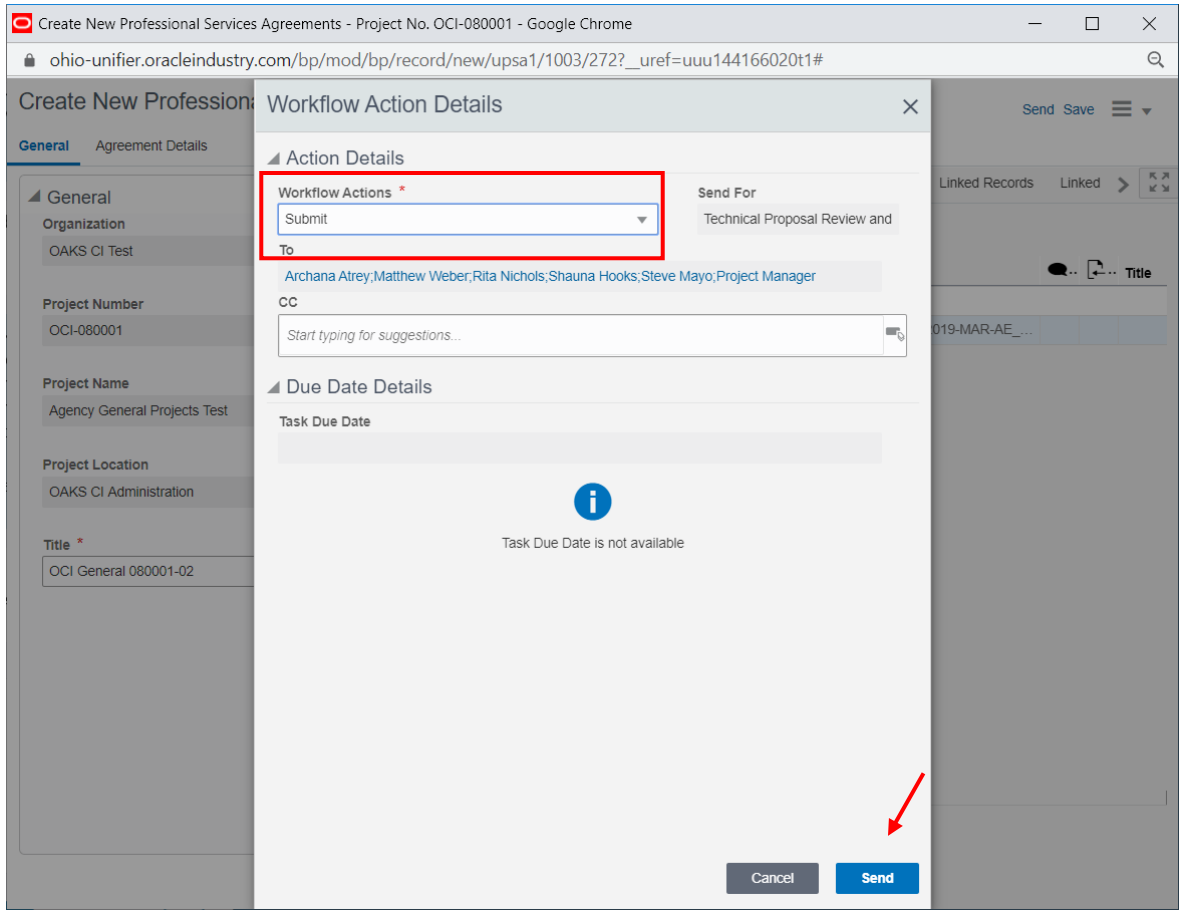
The added attachment(s) will be updated and display under the Attachments tab

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



Professional Services (Consultant) Agreement Agency Consultant Coordinator (Create Custom Print)

- Verify Workflow Action - **Submit**
- Click **Send**
- The record will move forward to the PM for Review



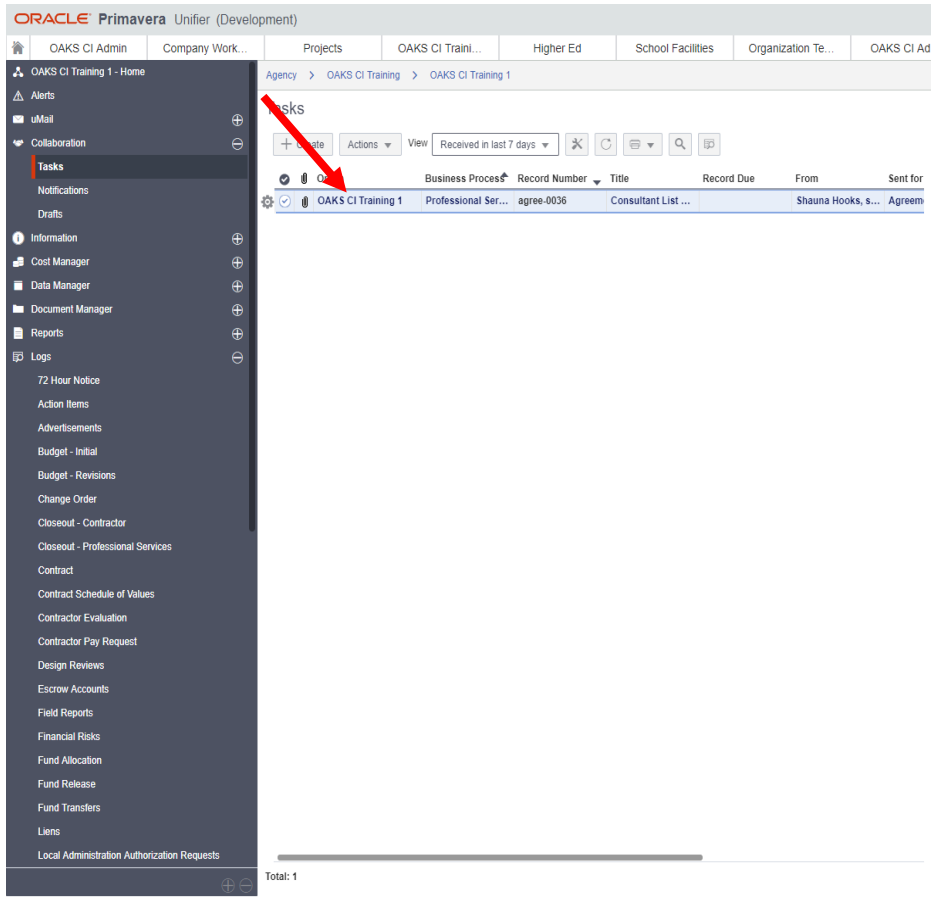
Professional Services (Consultant) Agreement PM (Review and Controlling Board)

Project Manager will receive a notification from OAKS CI via email:

Click the link in the email or:

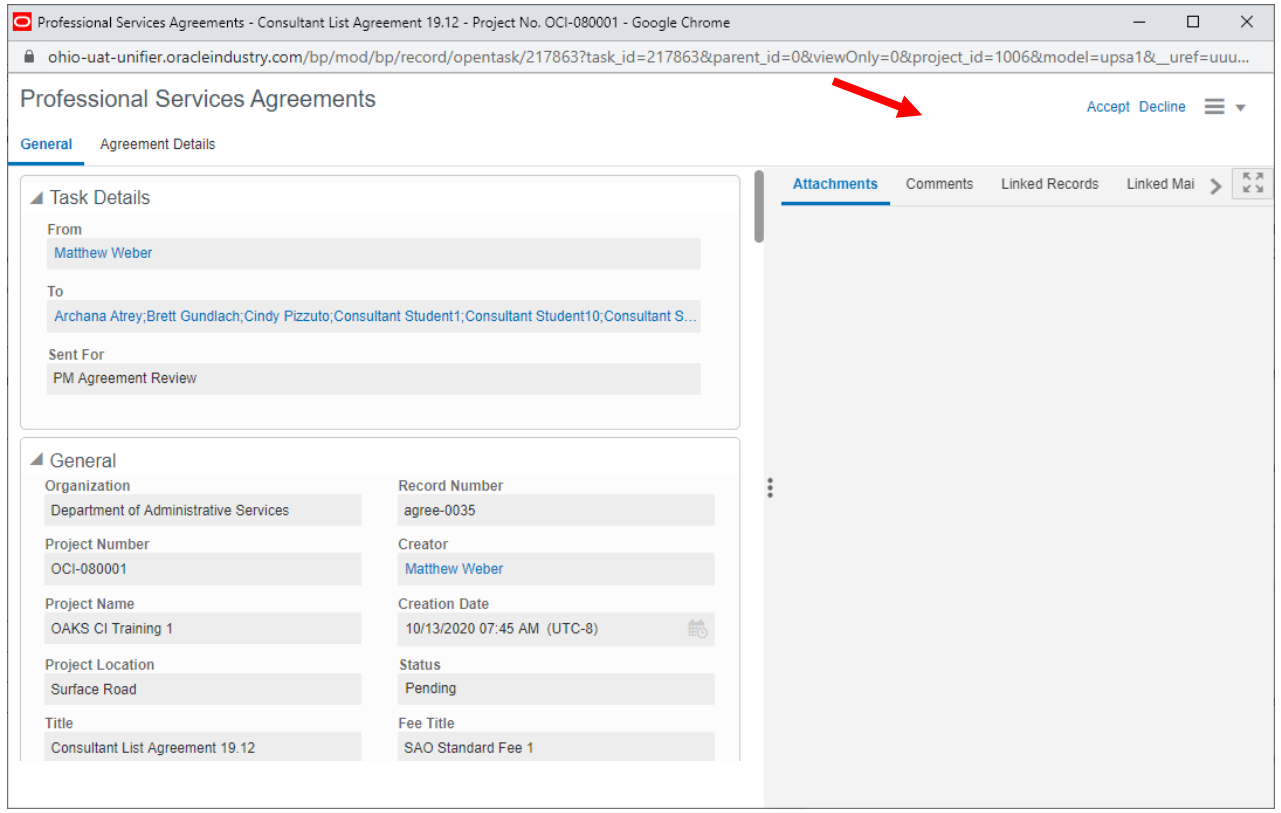
- Log into your project
- Click Tasks
- Double click the record

to open



Professional Services (Consultant) Agreement PM (Review and Controlling Board)

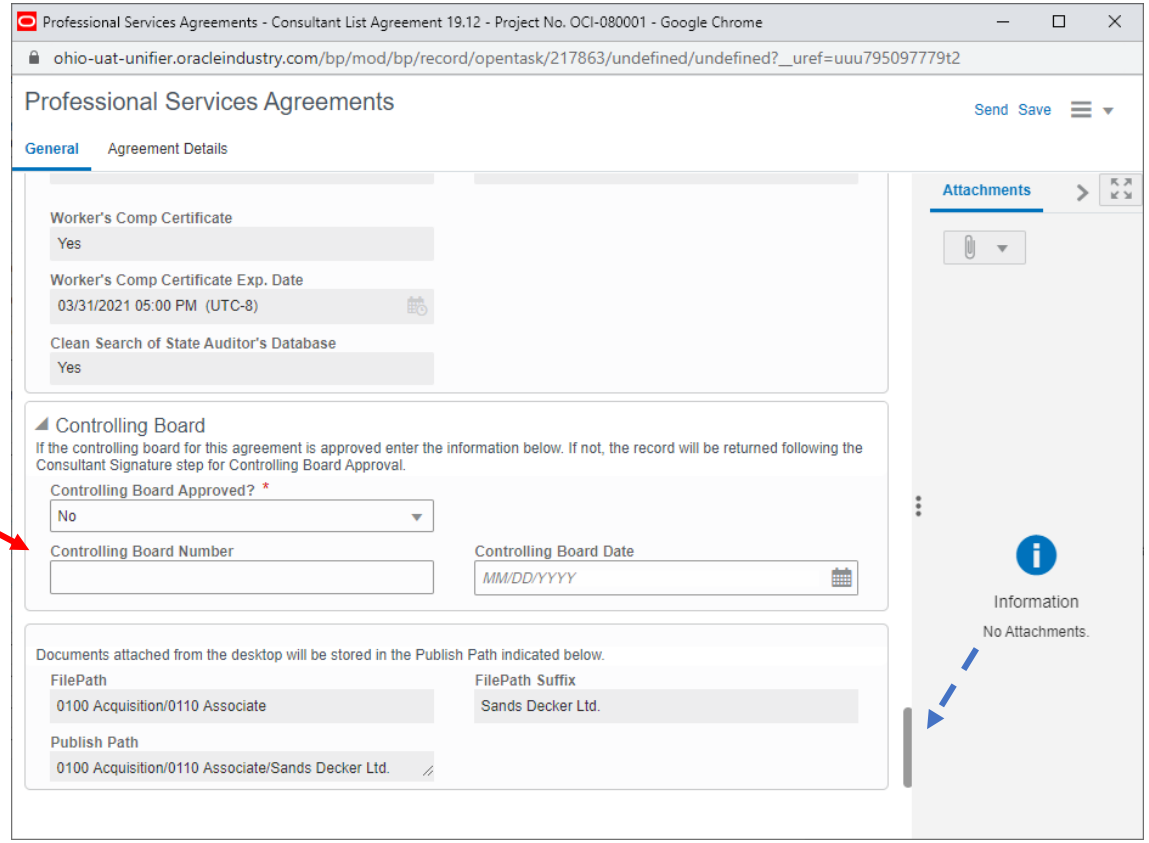
- Click **Accept**



Professional Services (Consultant) Agreement (PM Review and Controlling Board*)

- Review record and attachments
- Scroll down to: **Controlling Board**
- If Controlling Board has been approved:
  - ***Select Yes***
  - ***Enter Controlling Board Number and Date***
- If Controlling Board has not been Approved:
  - ***Select No***

**** if you choose: No, the record will come back to you after the Consultant signature for Controlling board information***



Professional Services (Consultant) Agreement PM (Review and Controlling Board) Submit to Consultant

- Click **Send** at the top of the record

➢ Choose workflow action:

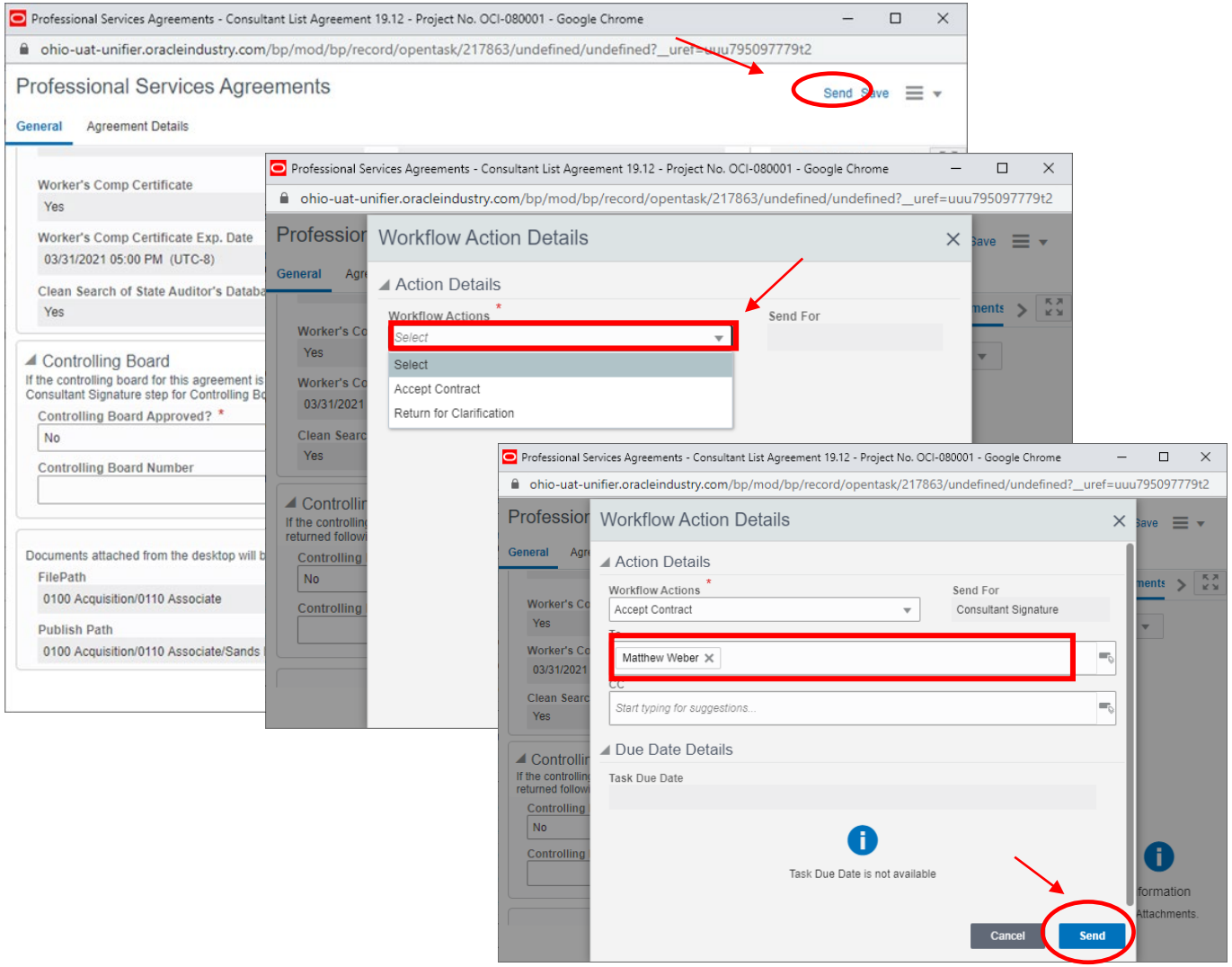
If 'Accept Contract' workflow action is chosen, record will go to the Consultant for Signature

If 'Return for Clarification' workflow action is chosen, record will go back to ACC for update, please ensure that you add General Comments

➢ Click Action Details:

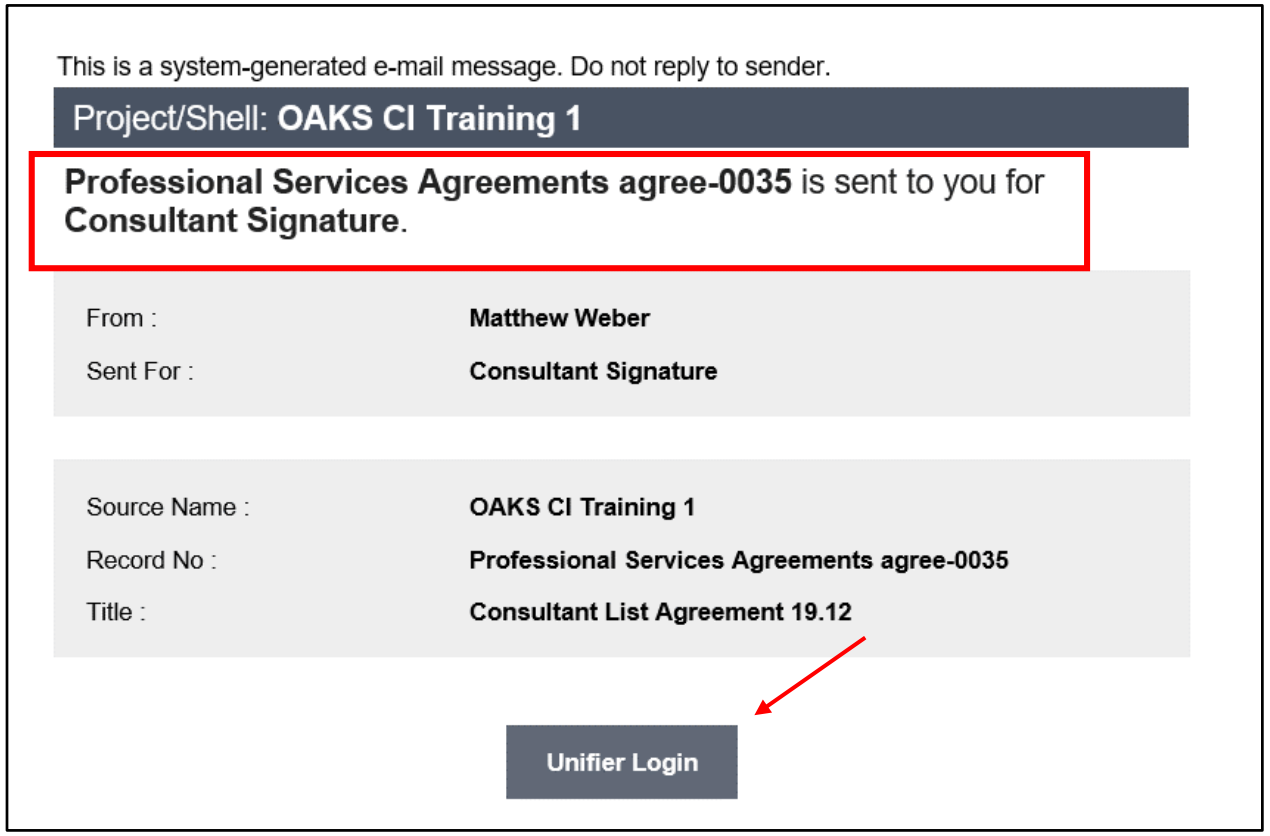
Select Consultant

➢ Click **Send**



Professional Services (Consultant) Agreement Consultant Signature

- Consultant receives an Email
- Click on the “Unifier Login” button to access the task



This is a system-generated e-mail message. Do not reply to sender.

Project/Shell: **OAKS CI Training 1**

Professional Services Agreements agree-0035 is sent to you for **Consultant Signature**.

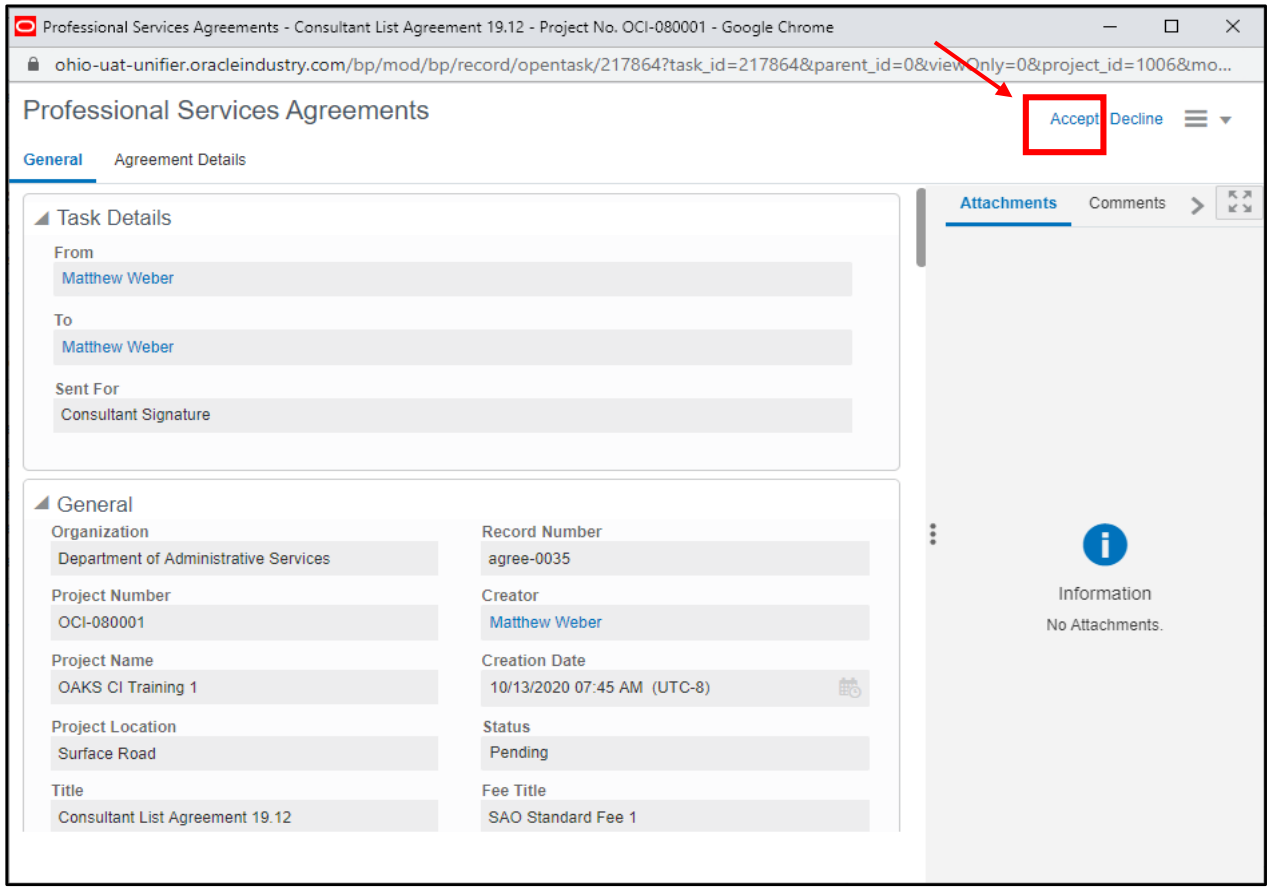
From :	**Matthew Weber**
Sent For :	**Consultant Signature**

Source Name :	**OAKS CI Training 1**
Record No :	**Professional Services Agreements agree-0035**
Title :	**Consultant List Agreement 19.12**

Unifier Login

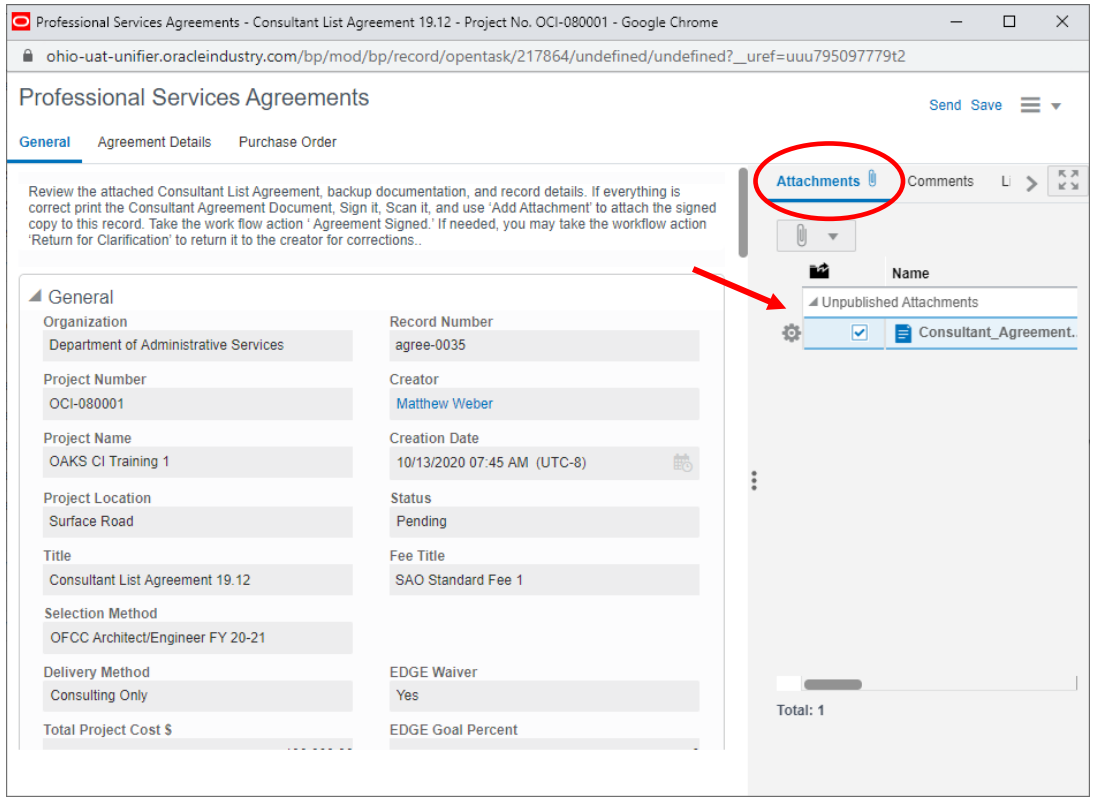
Professional Services (Consultant) Agreement Consultant Signature

- Click **Accept**



Professional Services (Consultant) Agreement Consultant Signature

- Open document in attachments tab
- Print and sign the attached agreement, scan copy of signed agreement to your computer
- Attach signed agreement with the supporting documents



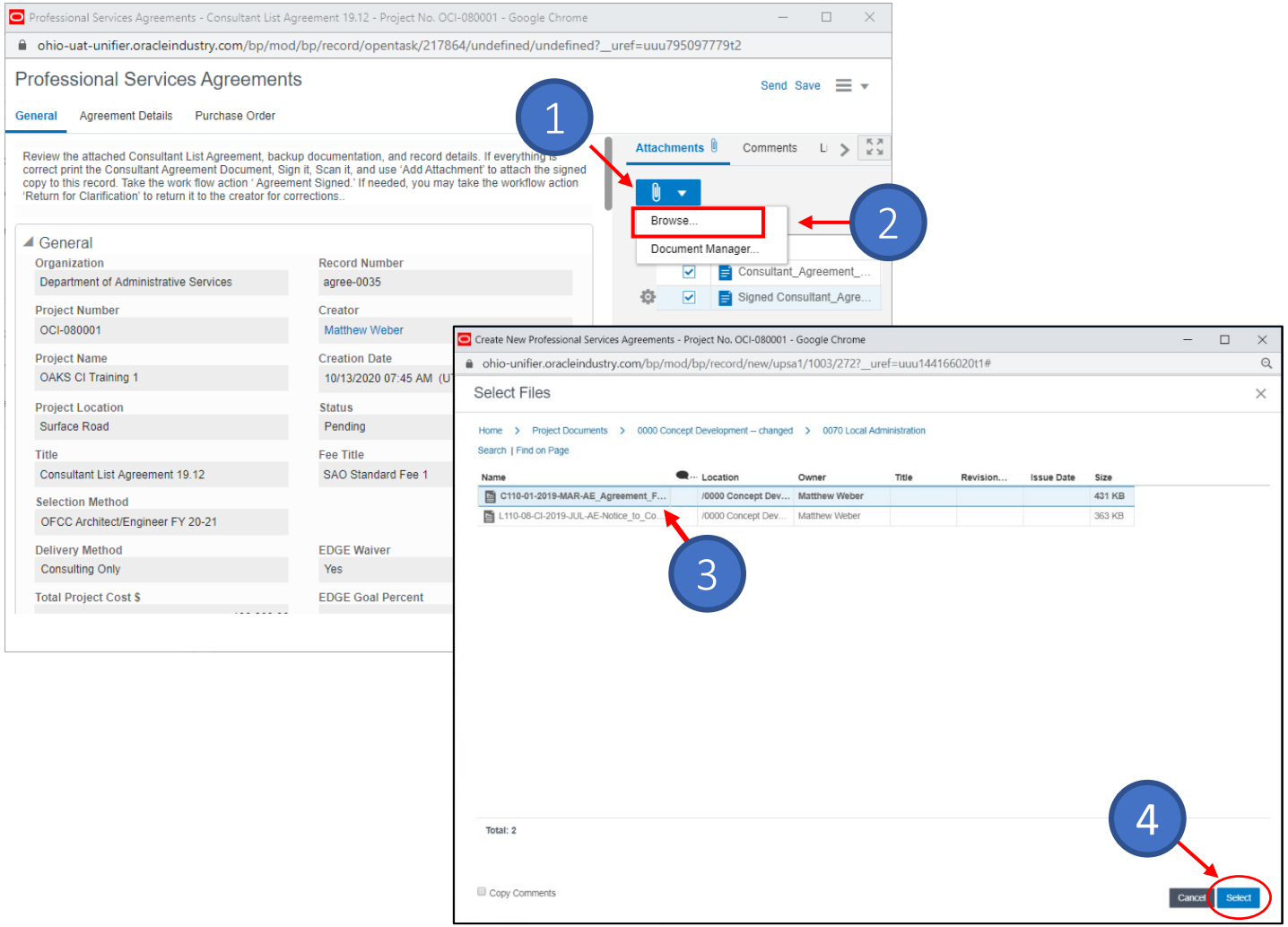
Professional Services (Consultant) Agreement Consultant Signature (Attach Documents)

1) Under the **Attachments** tab on the right side of the record, click the attachments button

2) Choose **Browse**

3) Navigate to the folder where the document is stored; select the document you wish to attach

4) Click **Select**

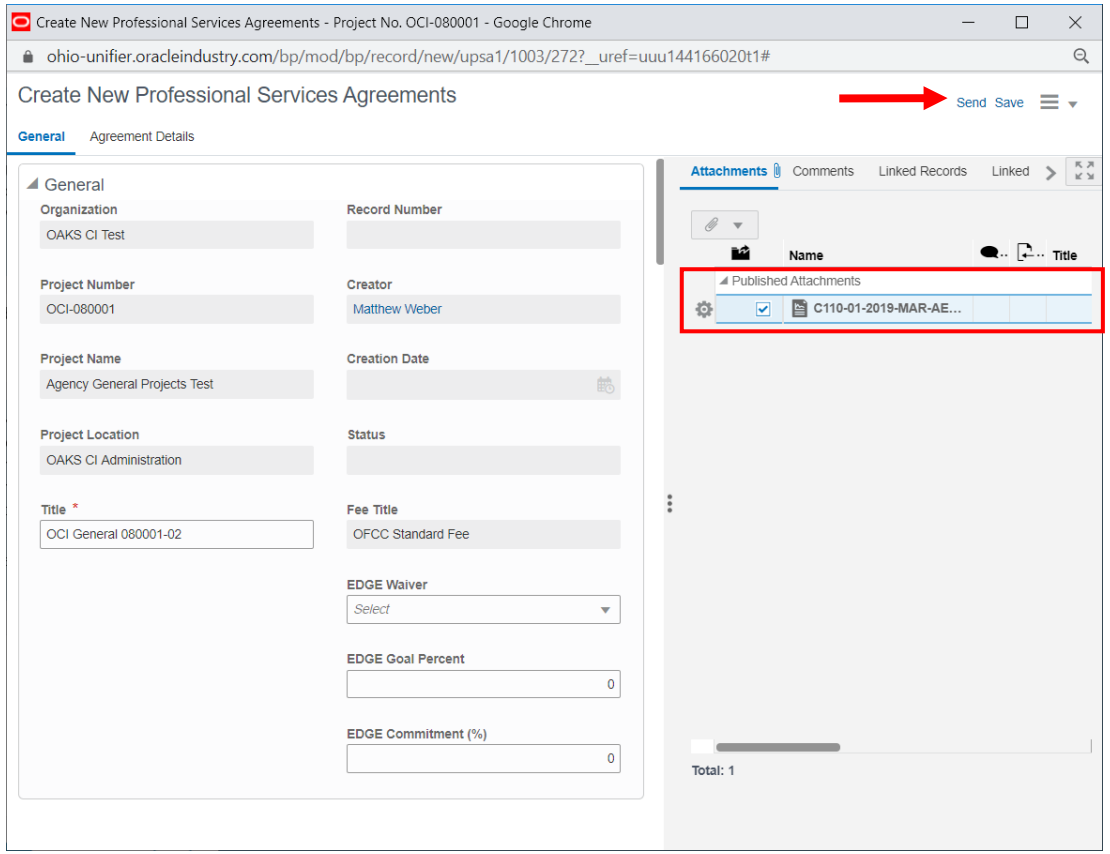


Professional Services (Consultant) Agreement Consultant Signature (Attach Documents)

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**

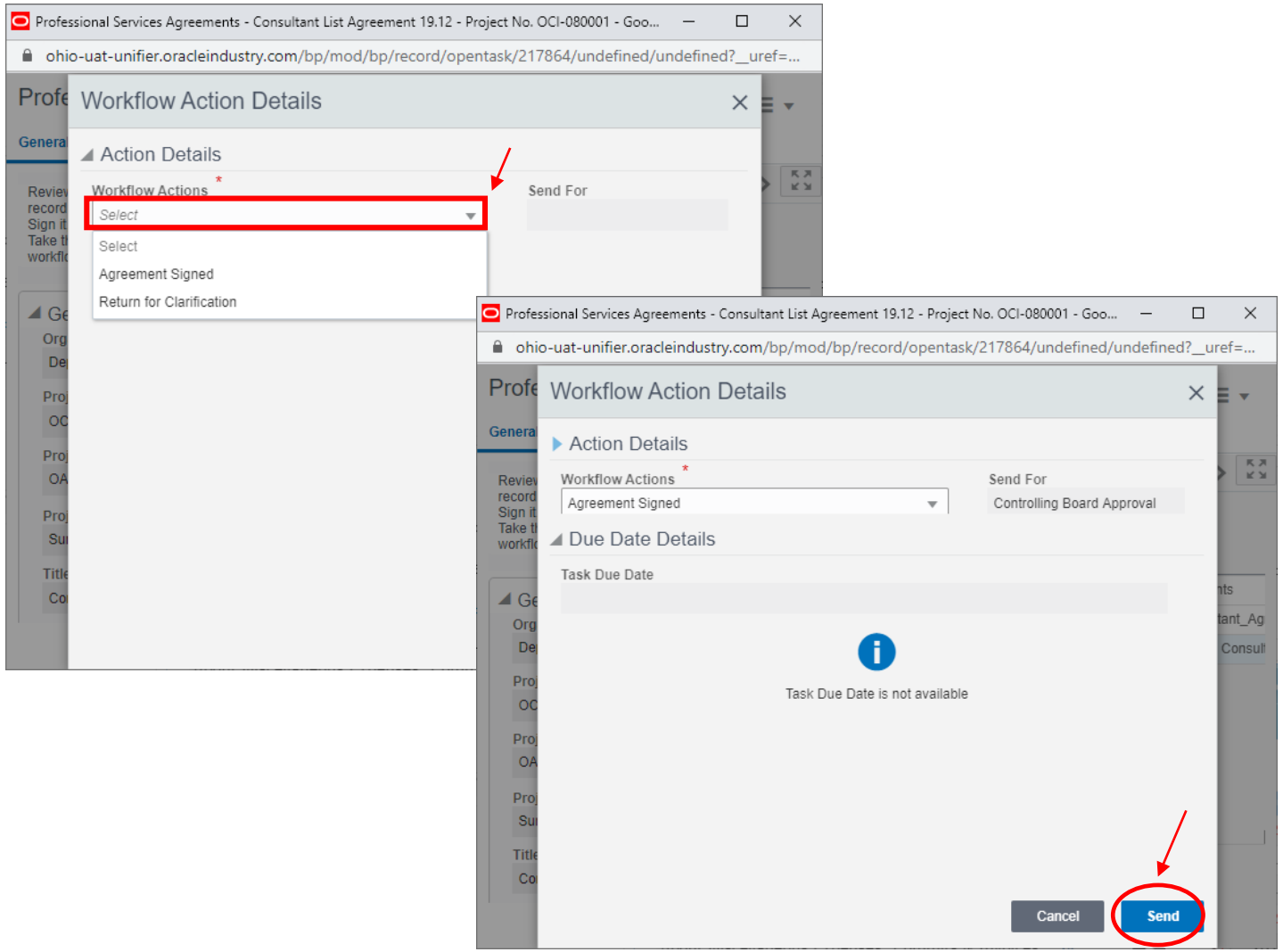


Professional Services (Consultant) Agreement Consultant Signature

Choose Workflow Action:

If you choose 'Accept Contract' the record will go to the Owner Financial for Funding Certification or back to the PM for Controlling Board information if block has not already been completed

If you choose 'Return for Clarification' record will go back to ACC for Update



➢ Click **Send**

Professional Services (Consultant) Agreement
Project Manager (Controlling Board)*

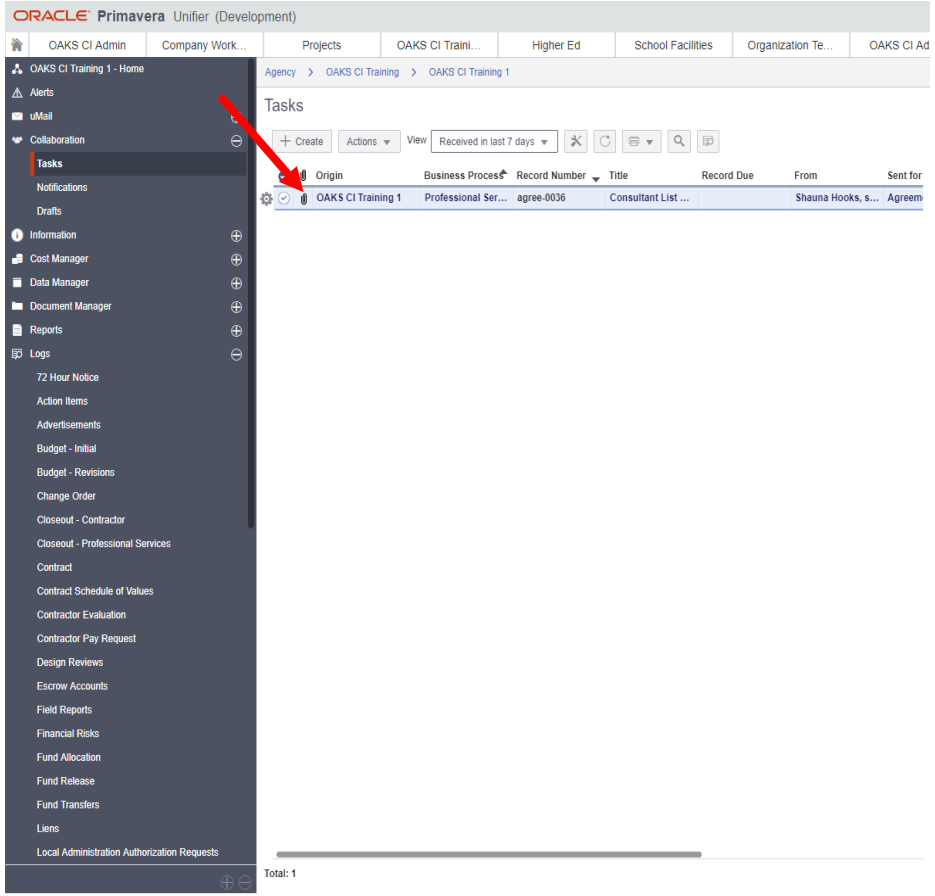
Project Manager will receive a notification from OAKS CI via email:

Click the link in the email or:

- Log into your project
- Click Tasks
- Double click the record

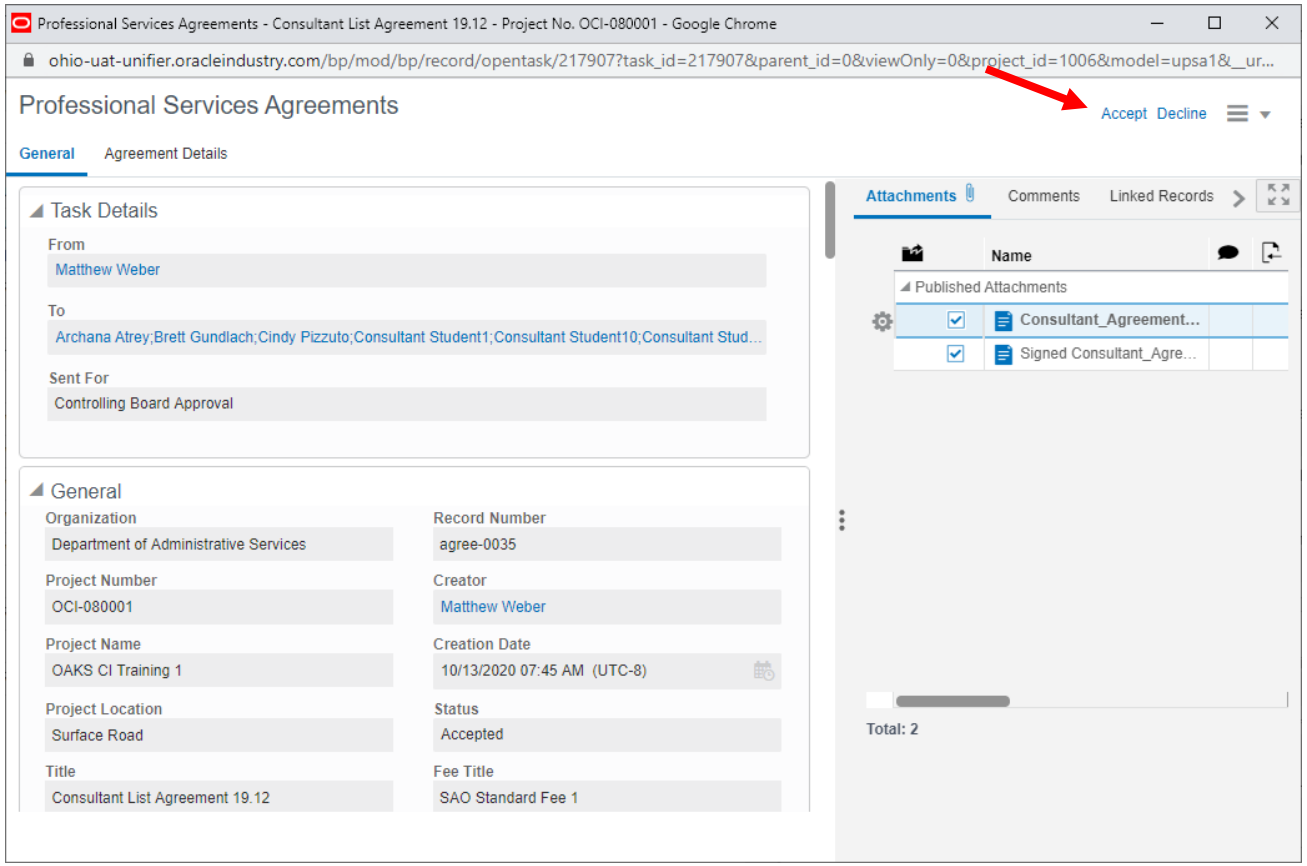
to open

*This step will only occur if the PM did not provide Controlling Board information at the PM Review step



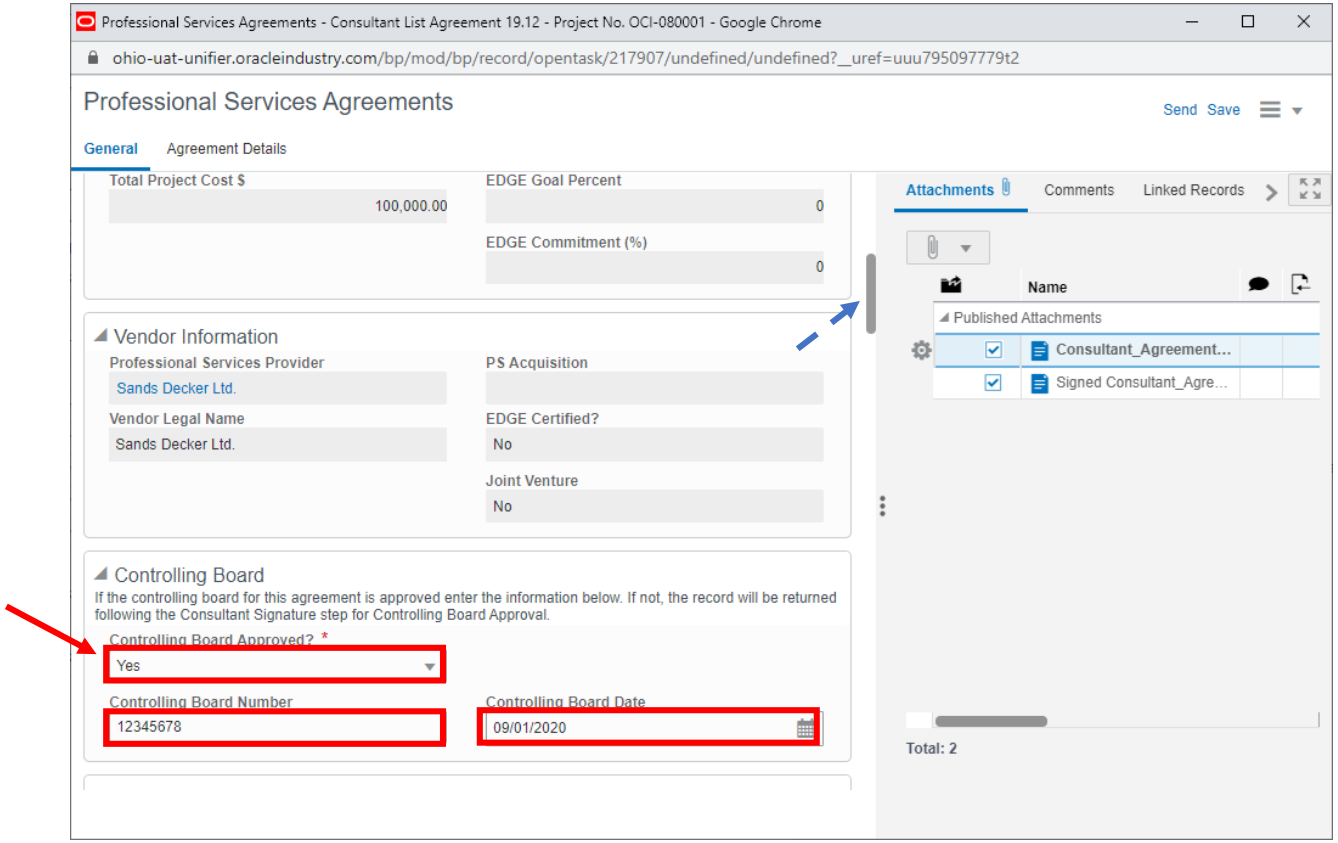
Professional Services (Consultant) Agreement
Project Manager (Controlling Board)*

- Click **Accept**



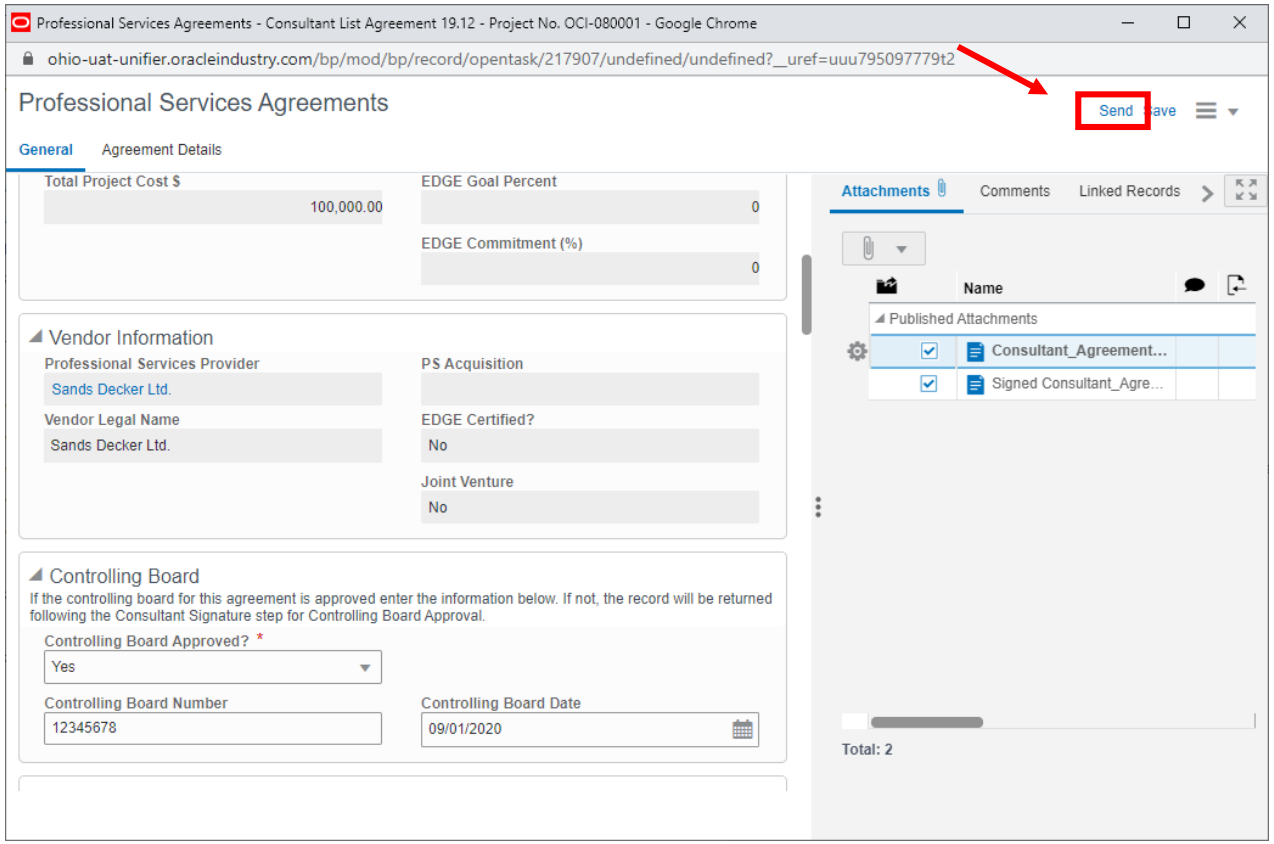
Professional Services (Consultant) Agreement
Project Manager (Controlling Board)*

- Scroll down to: **Controlling Board**
- Complete **Controlling Board** block:
  - ***Select Yes***
  - ***Enter Controlling Board Number and Date***



Professional Services (Consultant) Agreement
Project Manager (Controlling Board)*

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



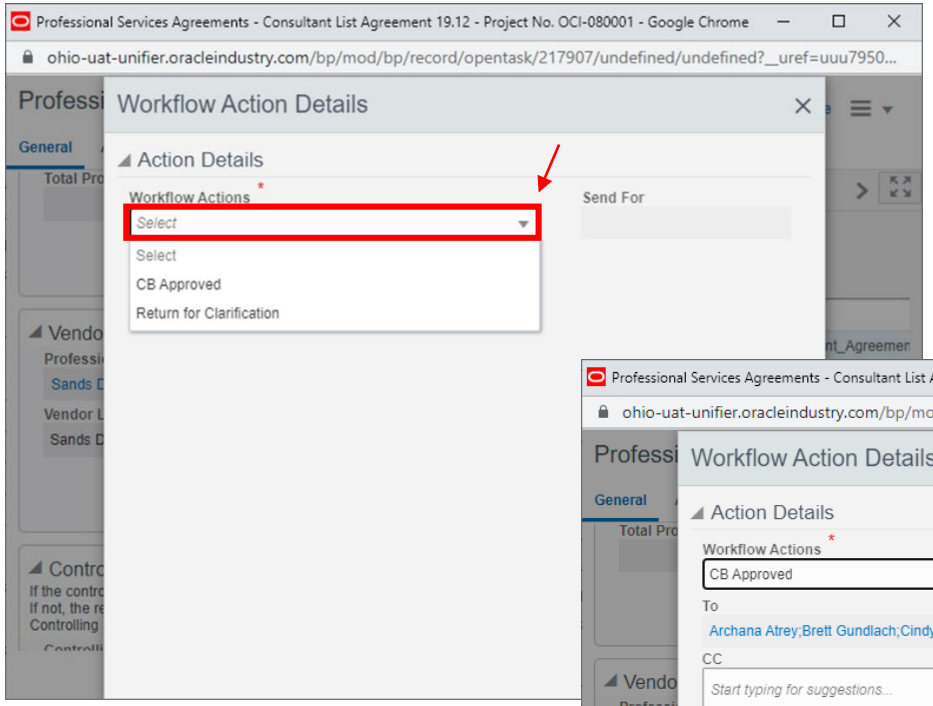
Professional Services (Consultant) Agreement
Project Manager (Controlling Board)*

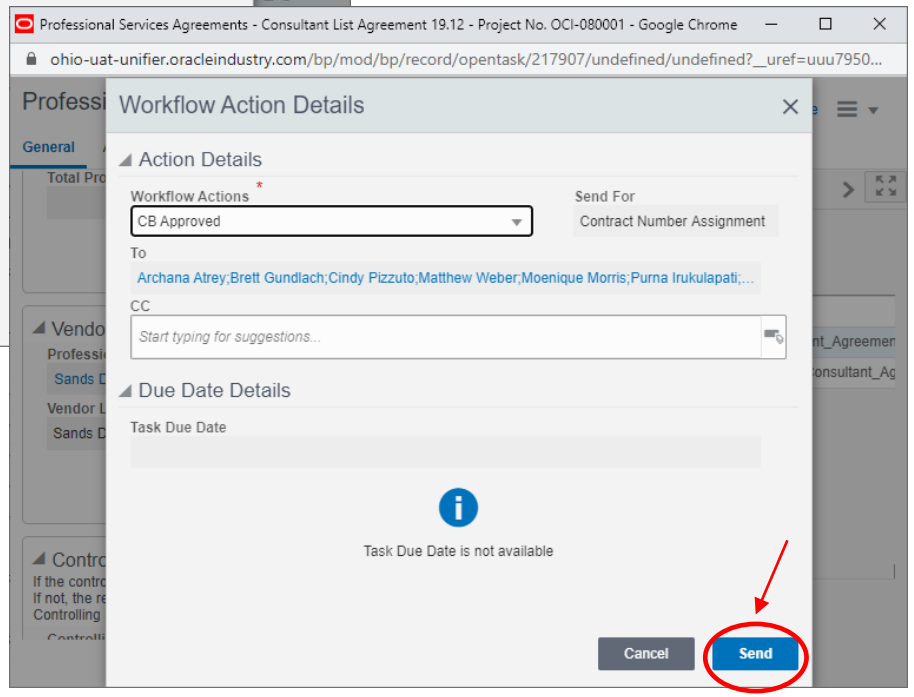
- Choose workflow action:

If 'CB Approved' workflow action is chosen, record will go to OFCC for Contract Number Assignment

If 'Return for Clarification' workflow action is chosen, record will go back to ACC for update, please ensure that you add General Comments

- Click **Send**



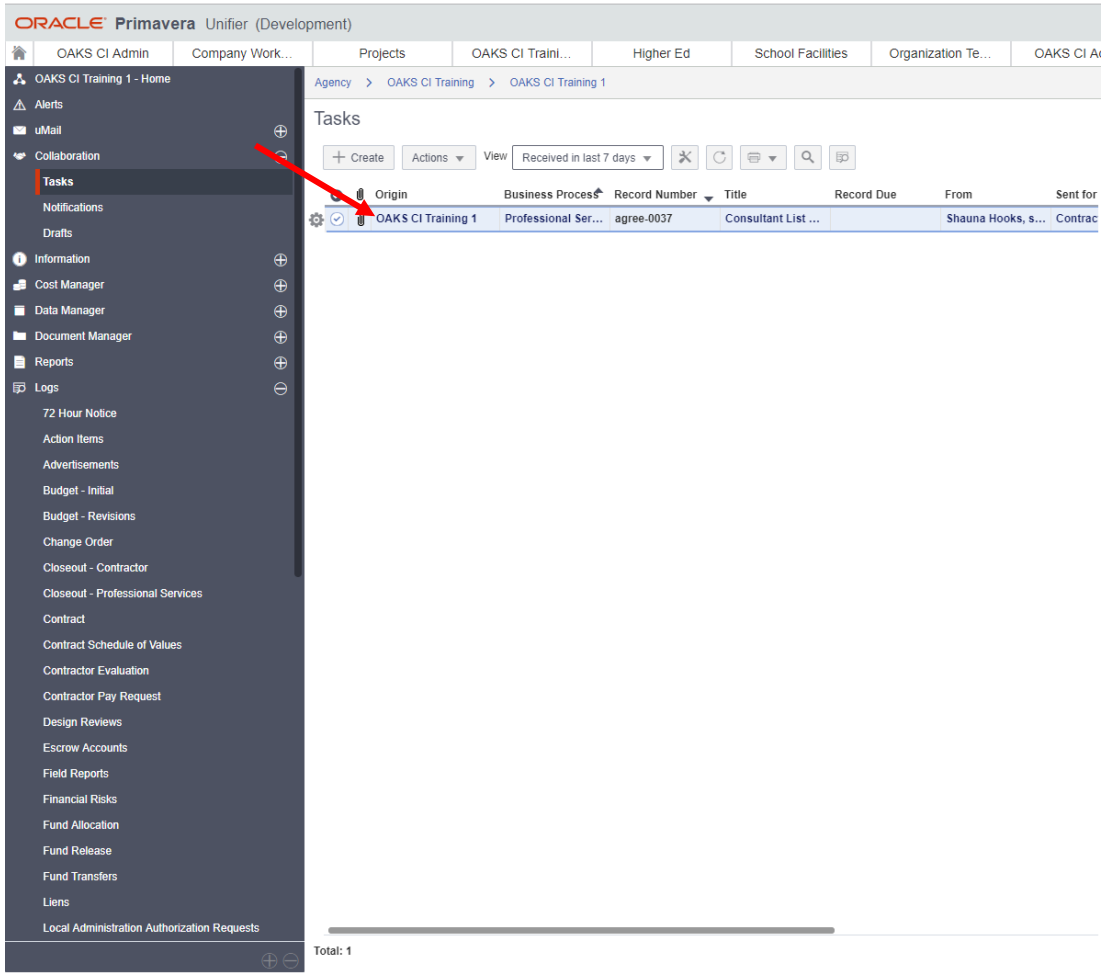


Professional Services (Consultant) Agreement OFCC (Contract Number Assignment)

Consultant Contract Manager will receive a notification from OAKS CI via email:

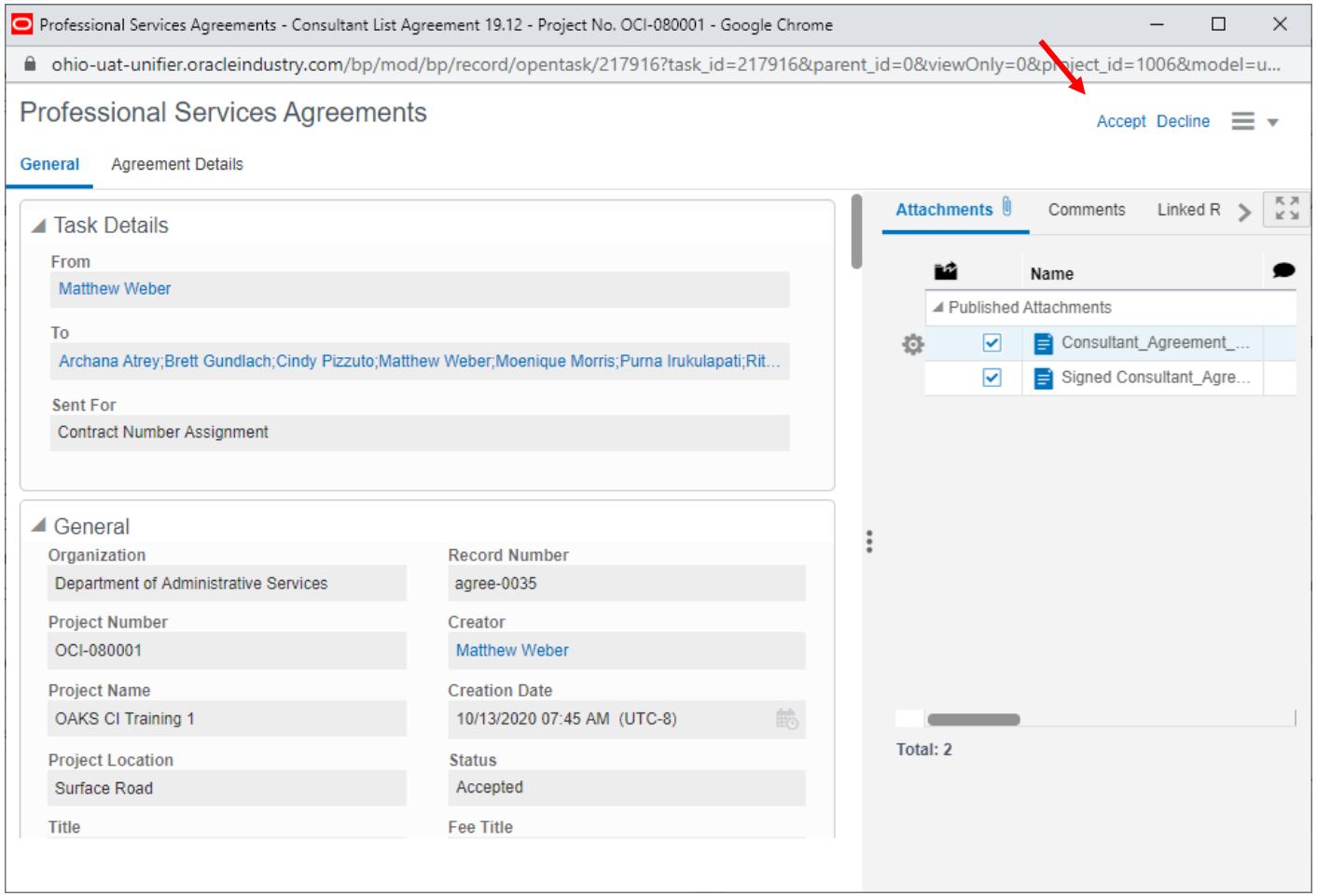
Click the link in the email or:

- Log into your project
- Click Tasks
- Double click the record to open



Professional Services (Consultant) Agreement (OFCC Contract Number)

- Click **Accept**



Professional Services (Consultant) Agreement (OFCC Contract Number)

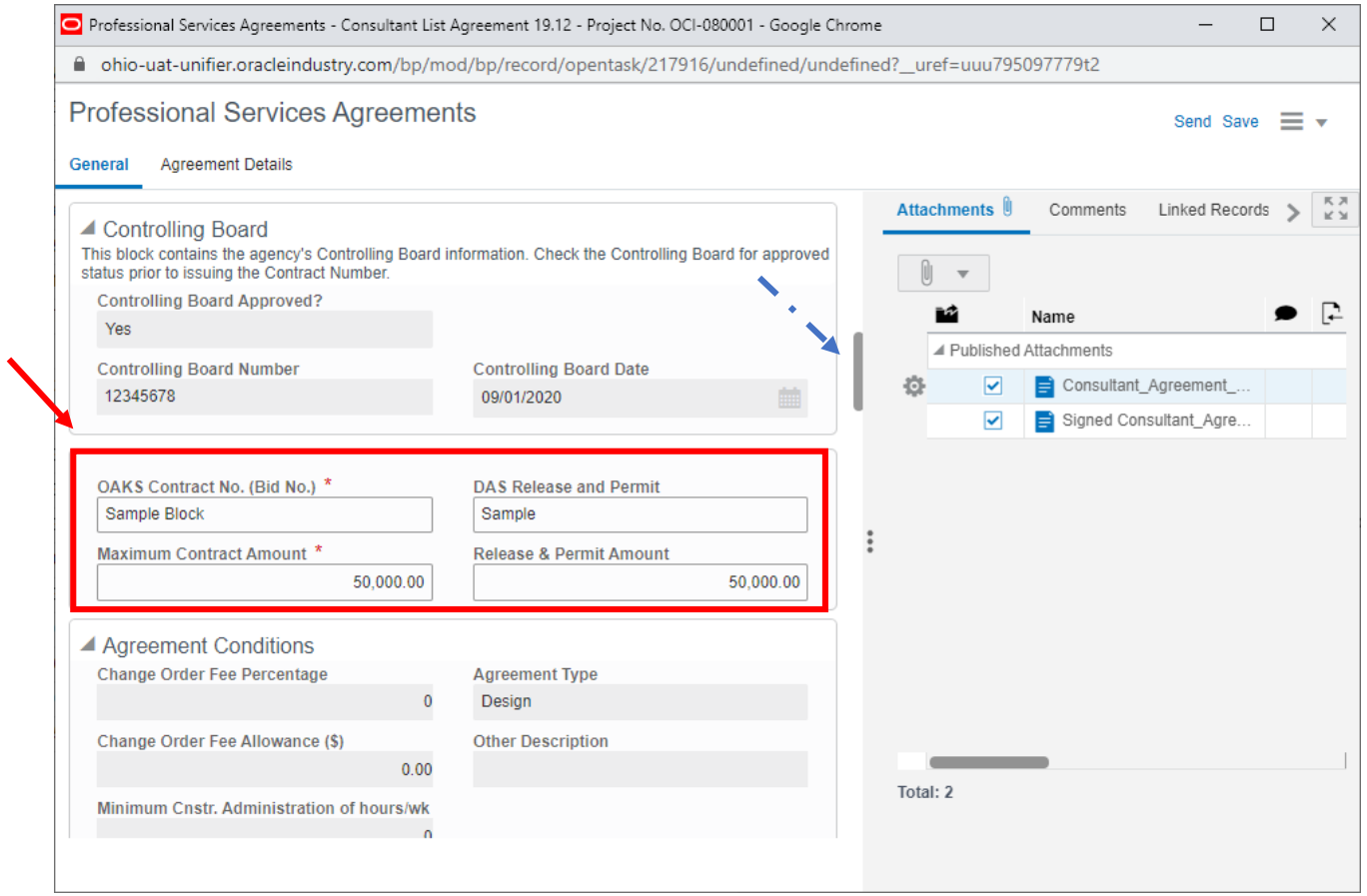
Check the following:

1)Does the consultant have available capacity for this project?

2) Is there a reservation for this consultant in OAKS CI?

3) Were other reservations cancelled (if needed) for any other consultants not chosen on this project?

4) Has controlling board been approved?



- Complete **Releases block**

Professional Services (Consultant) Agreement (Submit to Consultant)

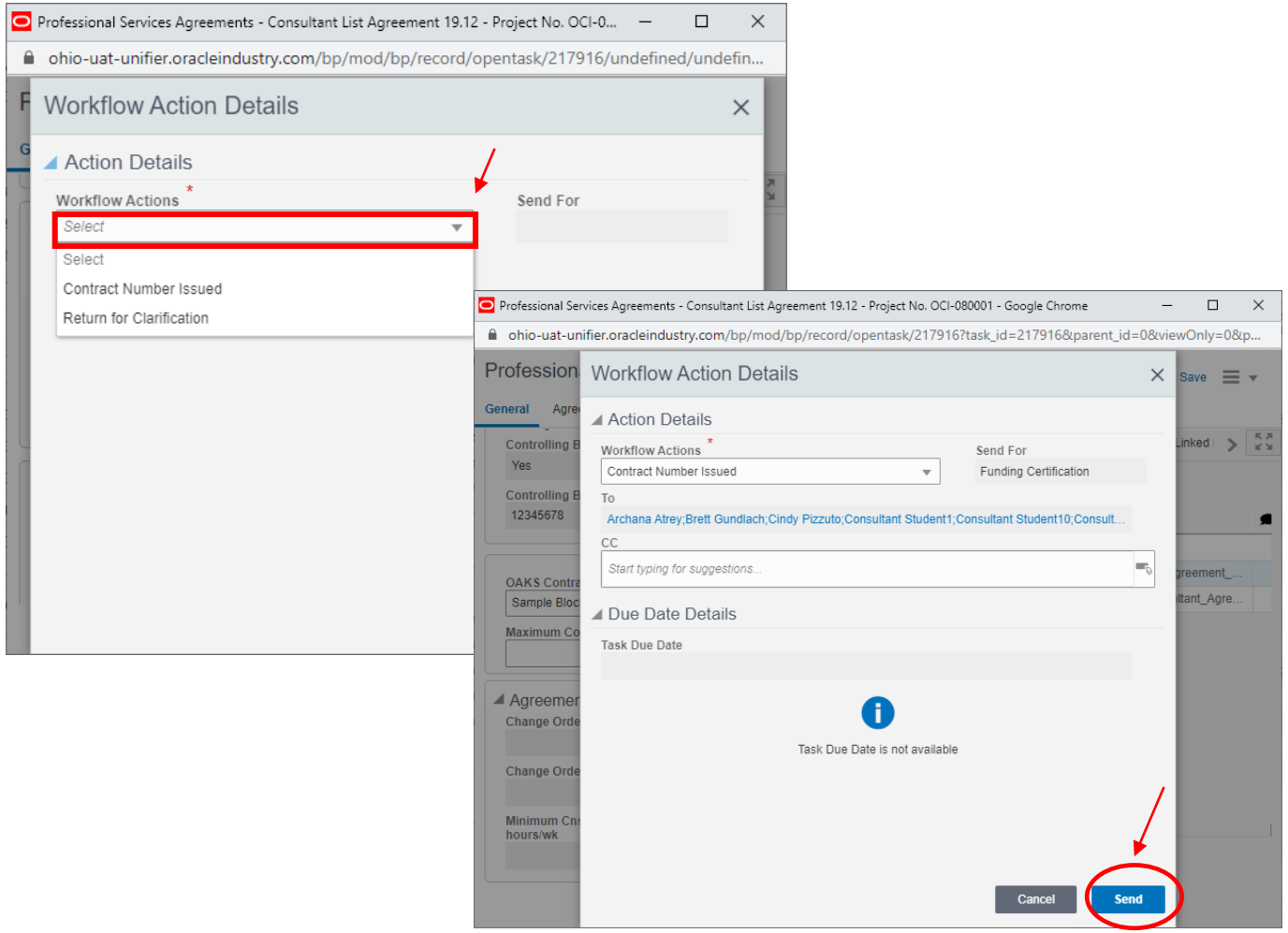
Once complete:

- Choose Workflow Action

If you choose 'Contract Number issued', record will go to the Agency Owner Financial for Funding Certification

If you choose 'Return for Clarification', record will go back to ACC for update

- Click **Send**

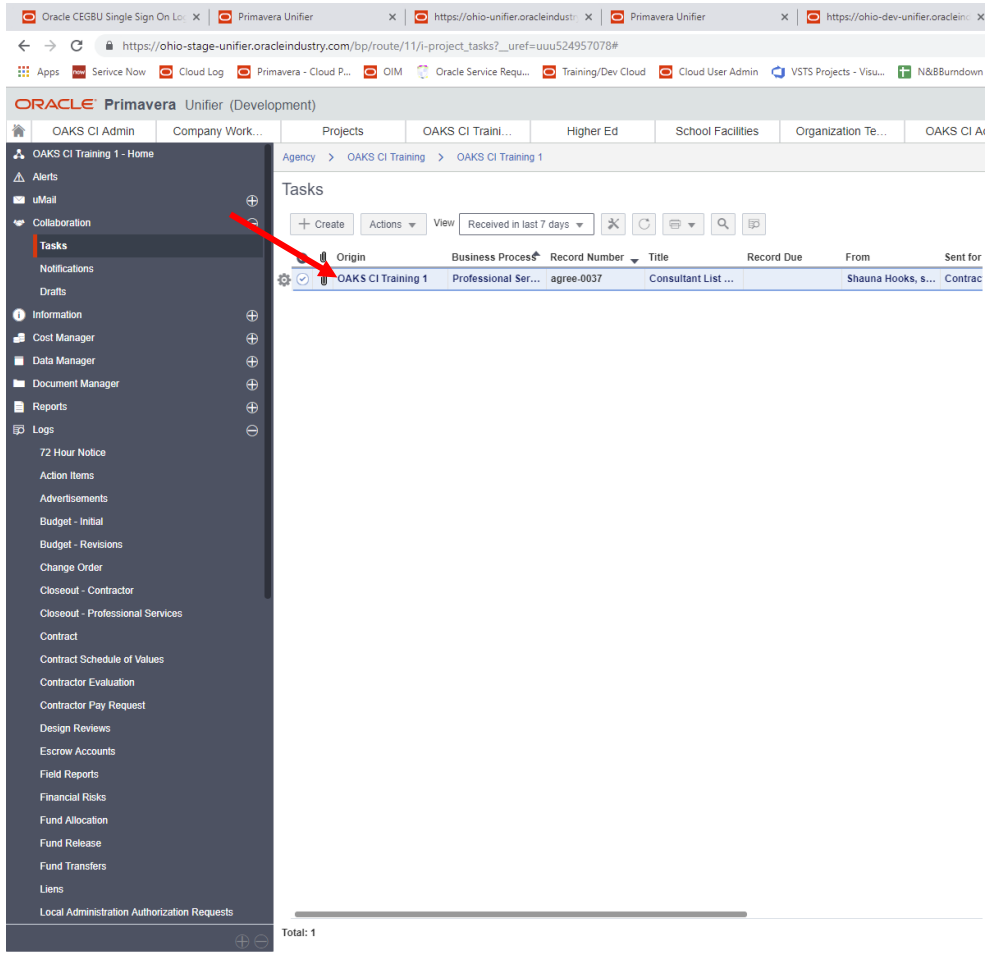


Professional Services (Consultant) Agreement Owner Financial (Funding Certification)

Owner Financial will receive a notification from OAKS CI via email:

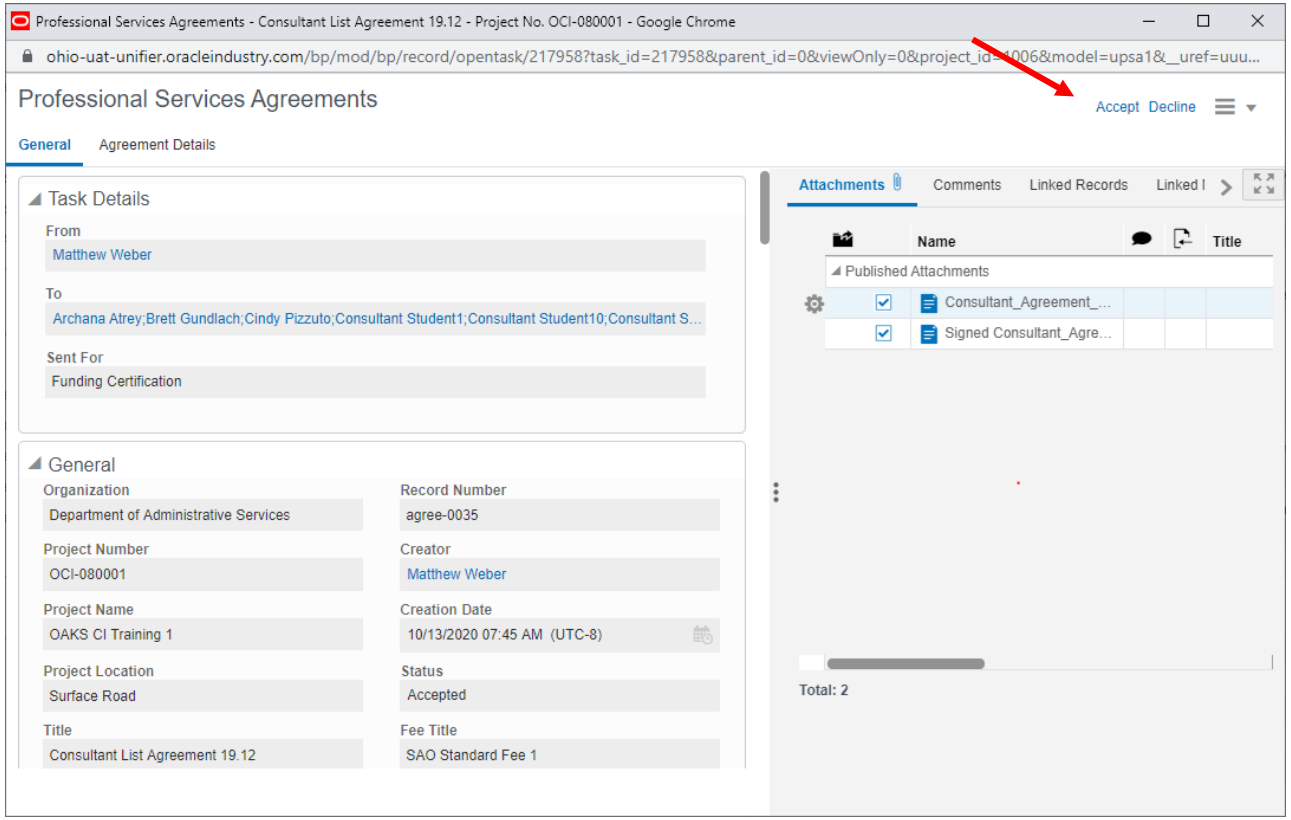
Click the link in the email ***or***

- Log into your project
- Click Tasks
- Double click the record to open



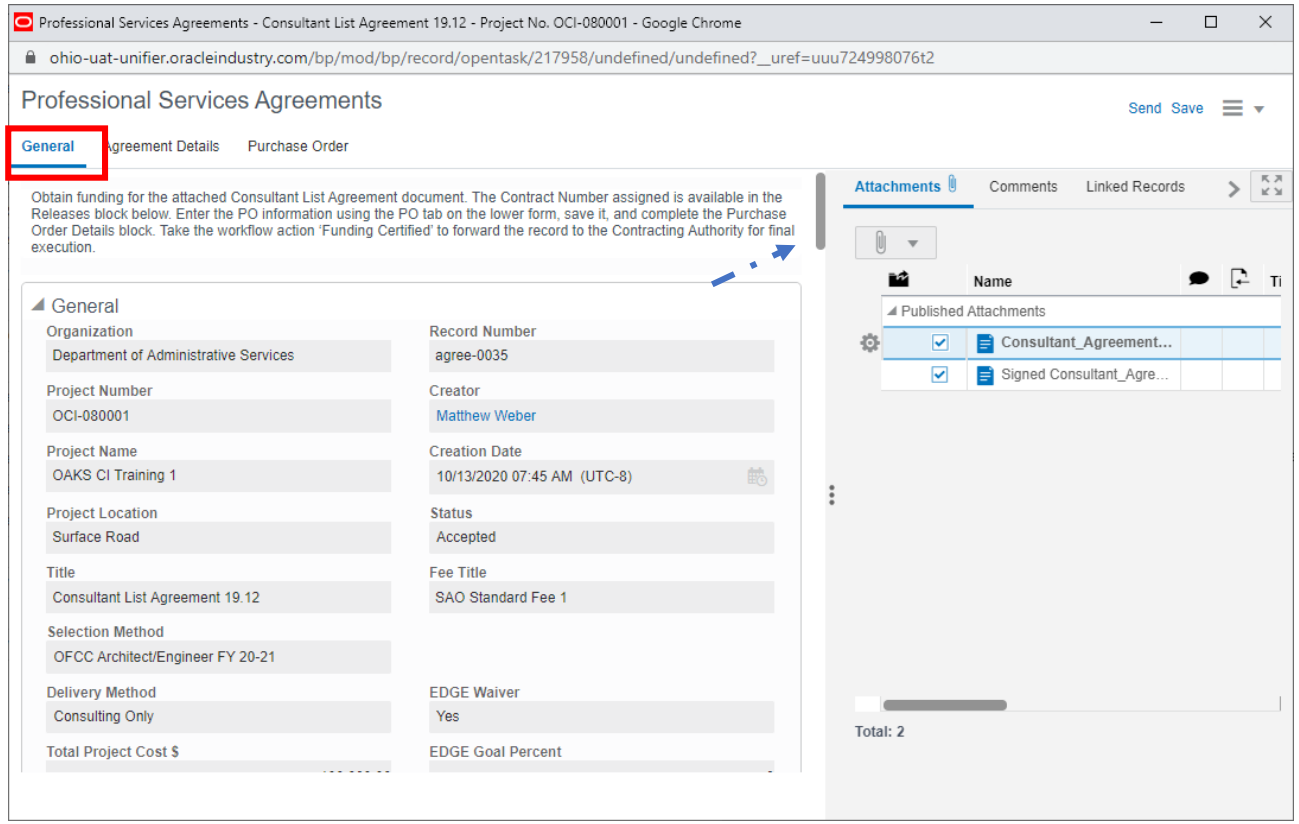
Professional Services (Consultant) Agreement Owner Financial (Funding Certification)

- Click: **Accept**



Professional Services (Consultant) Agreement Owner Financial (Funding Certification)

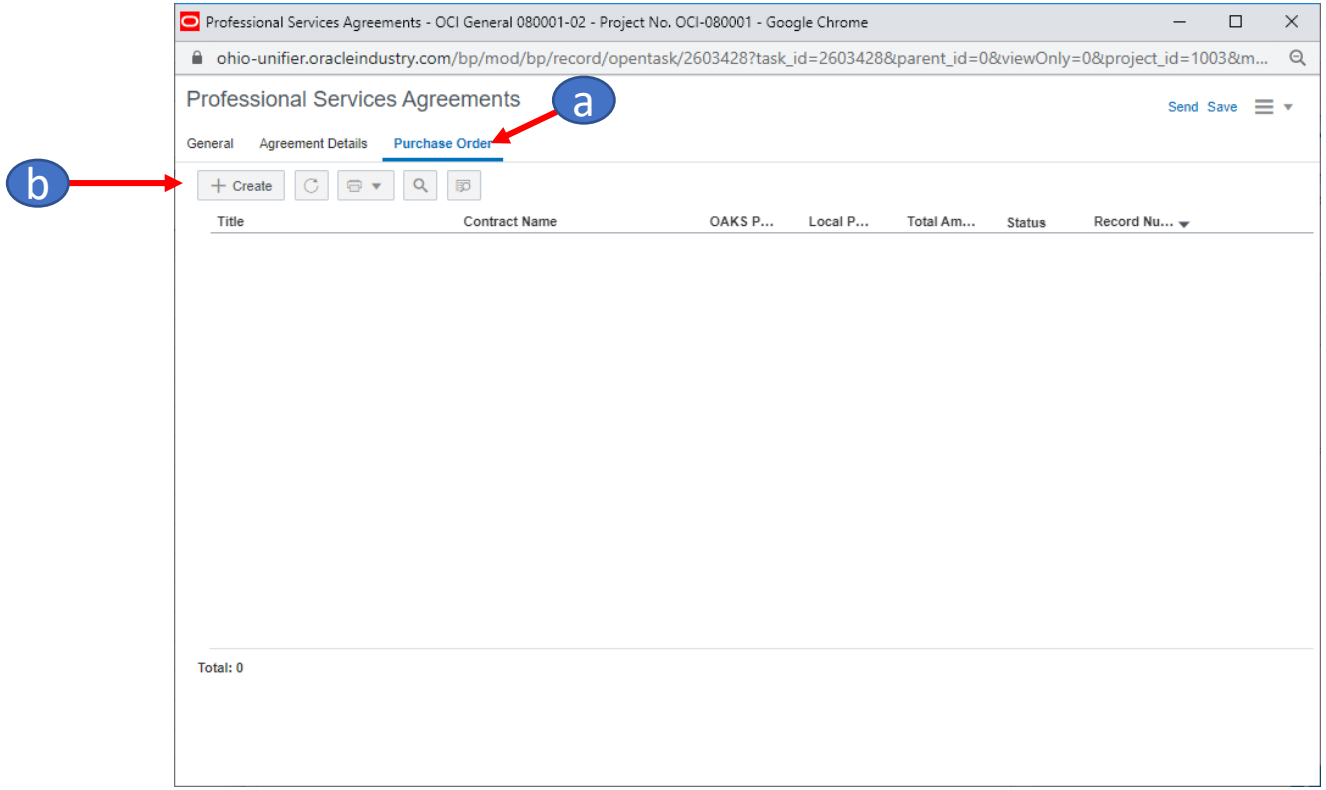
- Review record
- Create the Purchase Order in OAKS FIN or your financial system of record



Professional Services (Consultant) Agreement Owner Financial (Funding Certification)

- ***Record the Purchase Order information in this record***:

  a. Open the Purchase Order tab
  b. Click Create



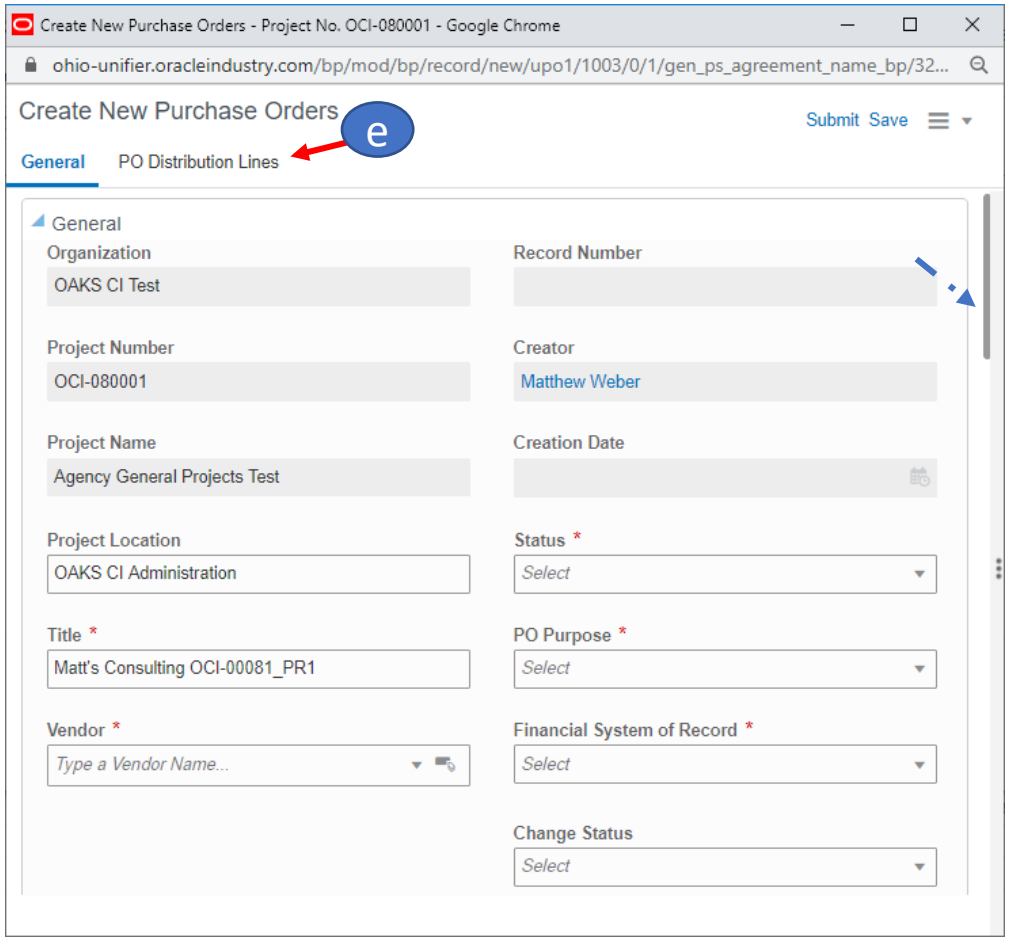
Professional Services (Consultant) Agreement Owner Financial (Funding Certification)

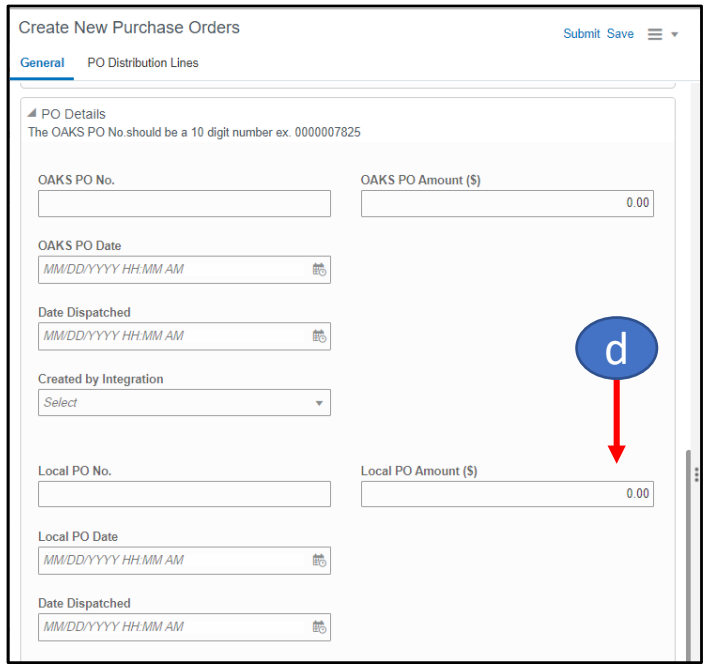
Record the Purchase Order in this record:

c. Complete the General block, scrolling down to all required fields

d. In PO Type section, ***Keep OAKS PO Amount field empty***

e. Click PO Distribution Lines tab to add Fund Codes





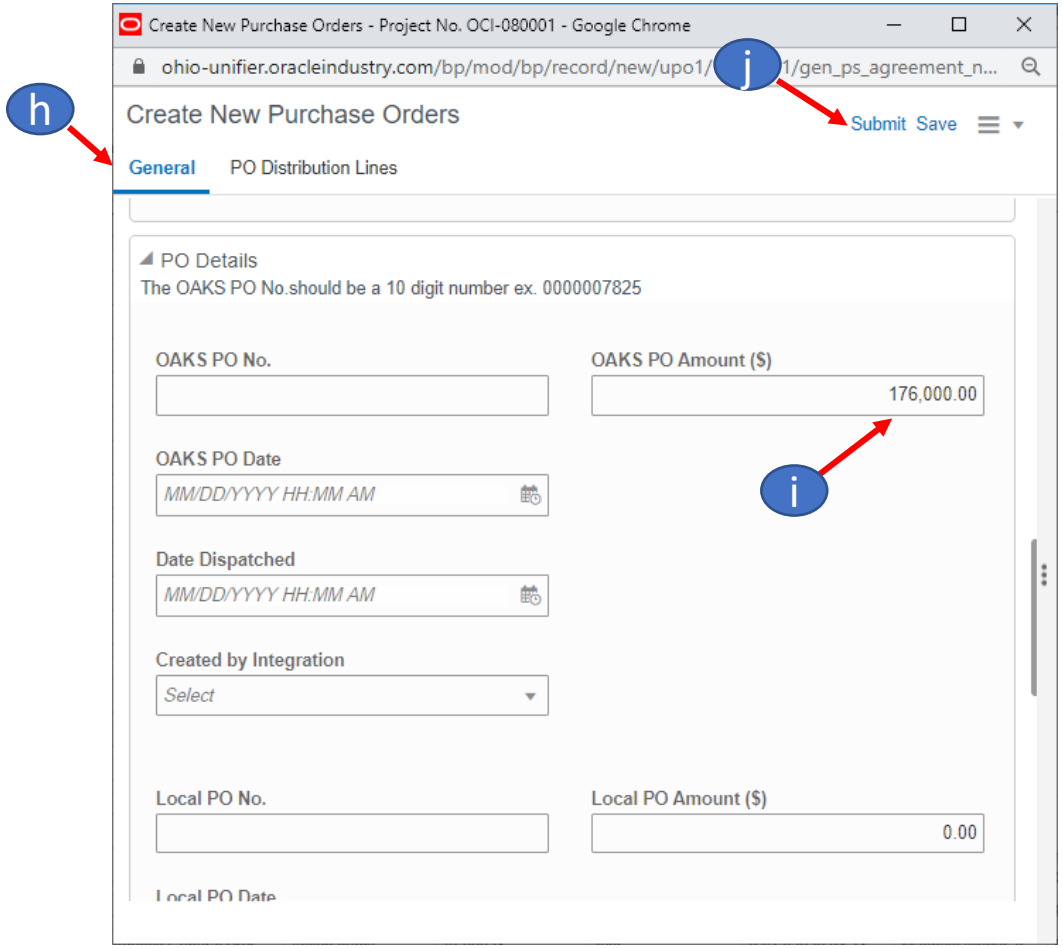
Professional Services (Consultant) Agreement Owner Financial (Funding Certification)

Complete Record:

h. Click General tab
View upper form

i. Enter the OAKS PO Amount

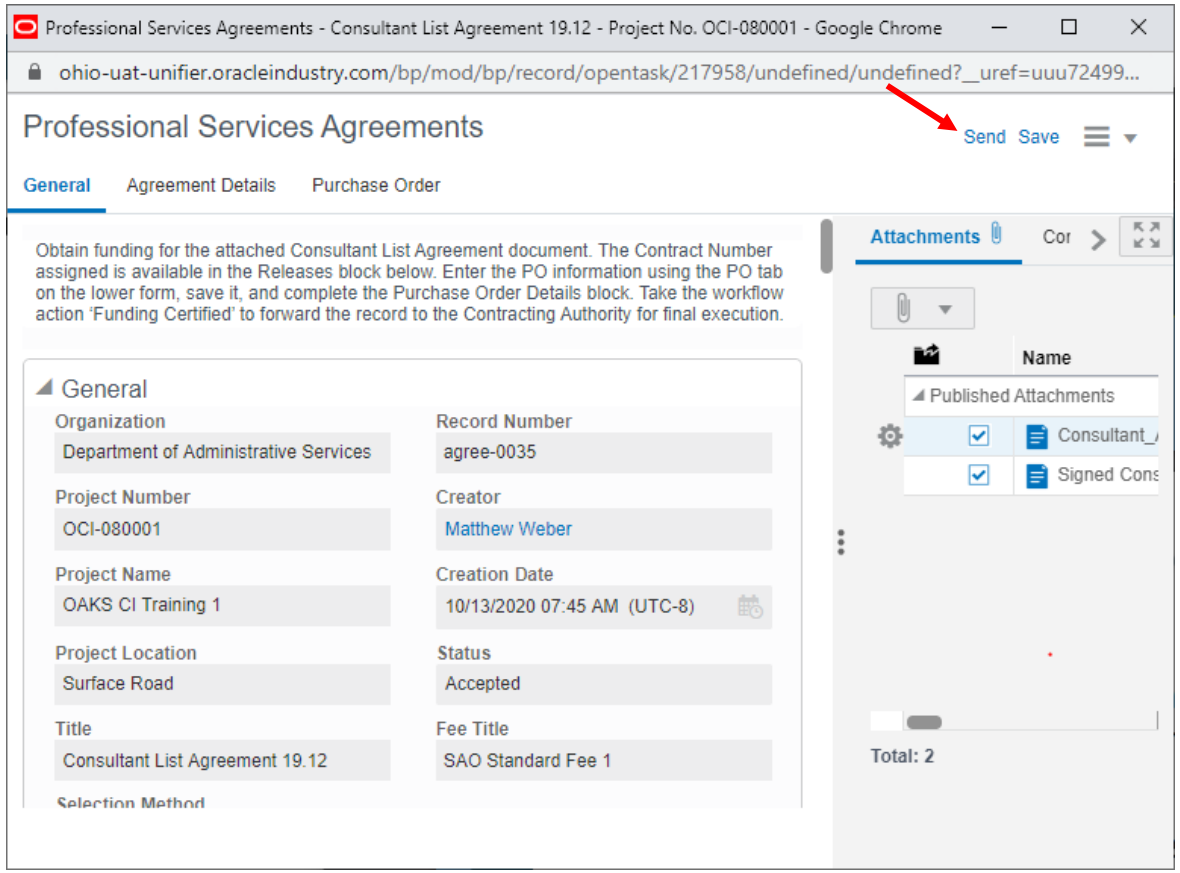
j. Click Submit Editing



Professional Services (Consultant) Agreement Owner Financial (Funding Certification)

Complete Record:

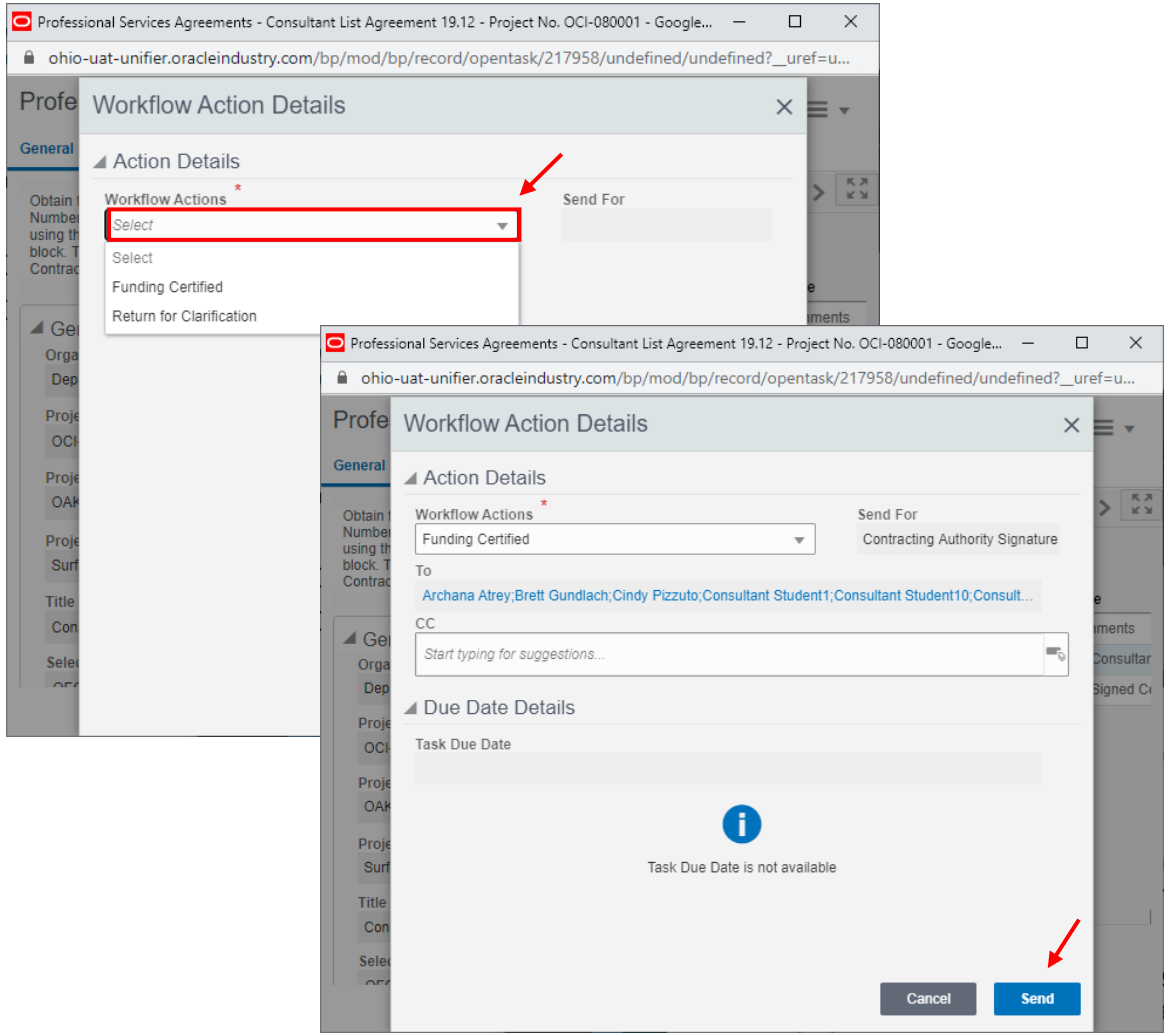
- When the record is ready to move forward, click ***Send***



Professional Services (Consultant) Agreement Owner Financial (Funding Certification)

- Choose: Workflow Action
  - ***If you choose 'Funding Certified', record will go to Contracting Authority for Signature***
  - ***If you choose 'Return for Clarification', record will be returned to ACC for update***

- Click Send

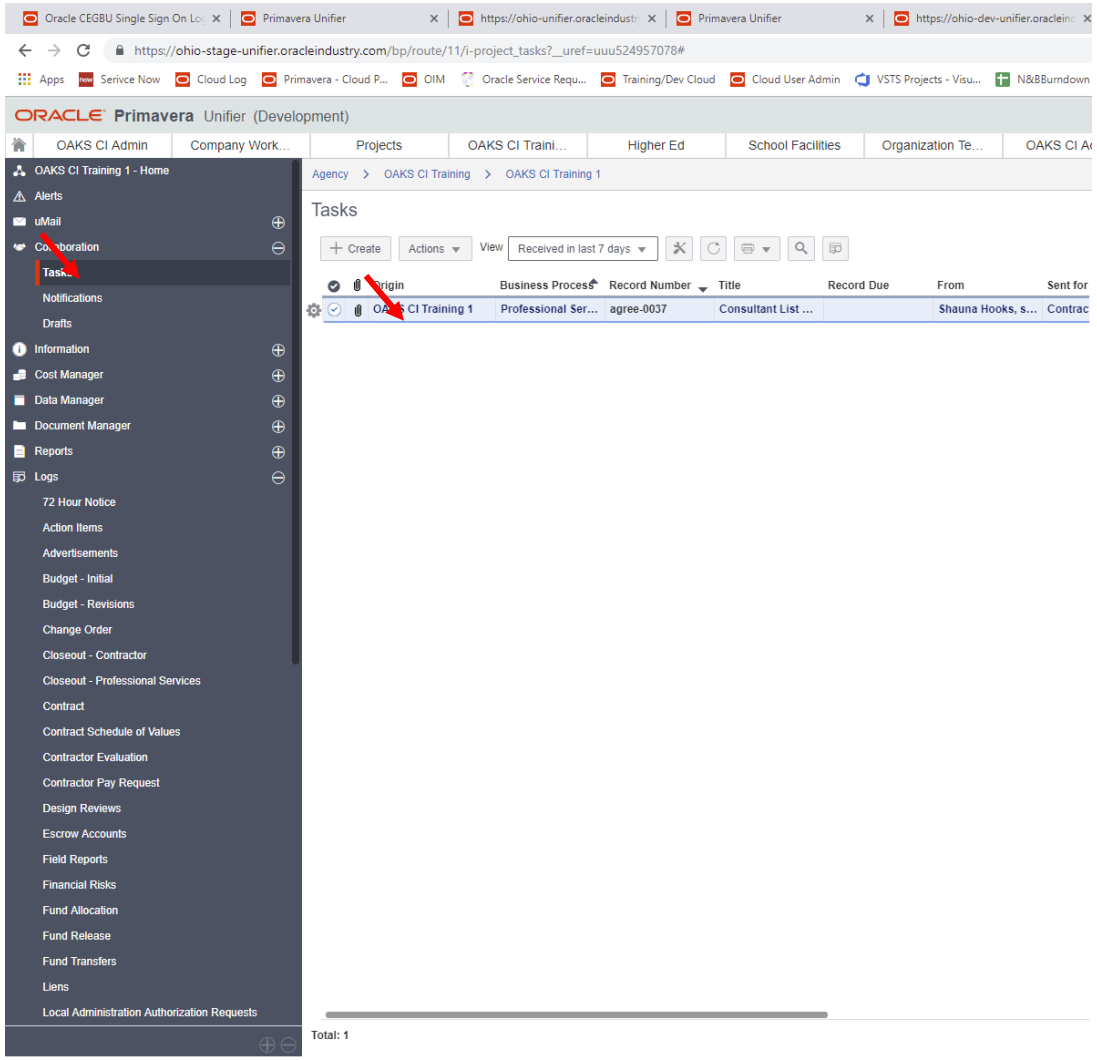


Professional Services (Consultant) Agreement Contracting Authority (Signature)

Contracting Authority will receive a notification from OAKS CI via email:

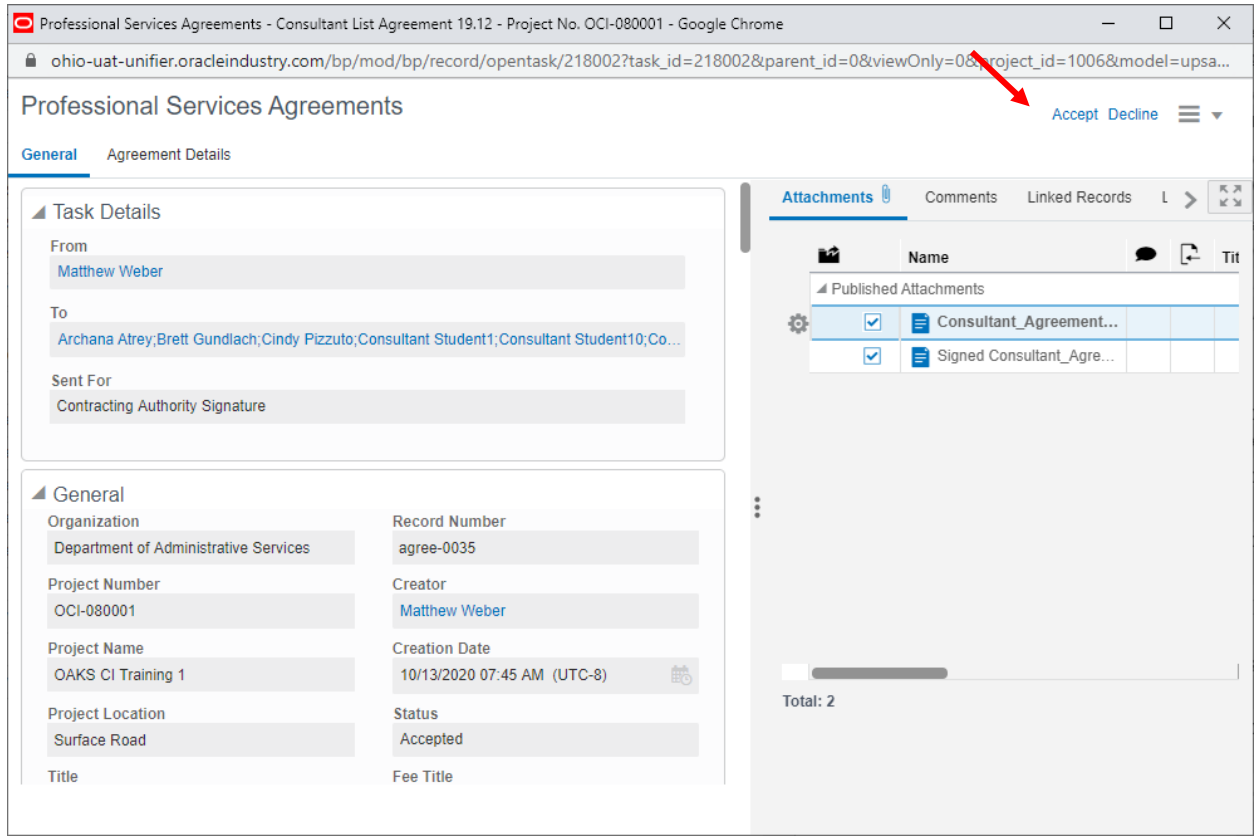
Click the link in the email or :

- Log into your project
- Click Tasks
- Double click the record to open



Professional Services (Consultant) Agreement Contracting Authority (Signature)

- Click: **Accept**
- Print and sign the agreement, scan copy to your computer
- Attach signed agreement to record



Professional Services (Consultant) Agreement Contracting Authority (Signature)

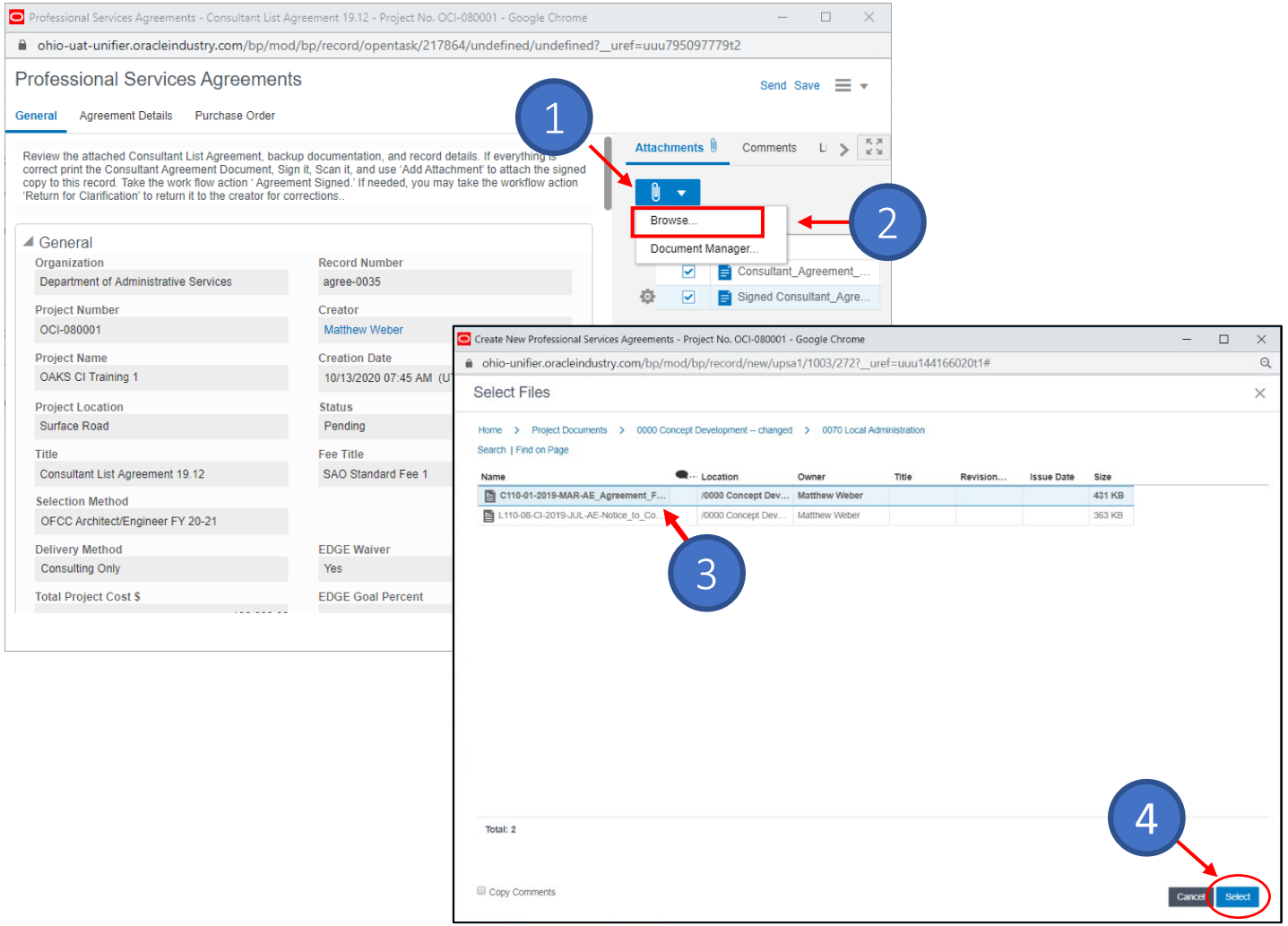
Attach all necessary documents:

1) Under the **Attachments** tab on the right side of the record, click the attachments button

2) Choose **Browse**

3) Navigate to the folder where the document is stored; select the document you wish to attach

4) Click **Select**

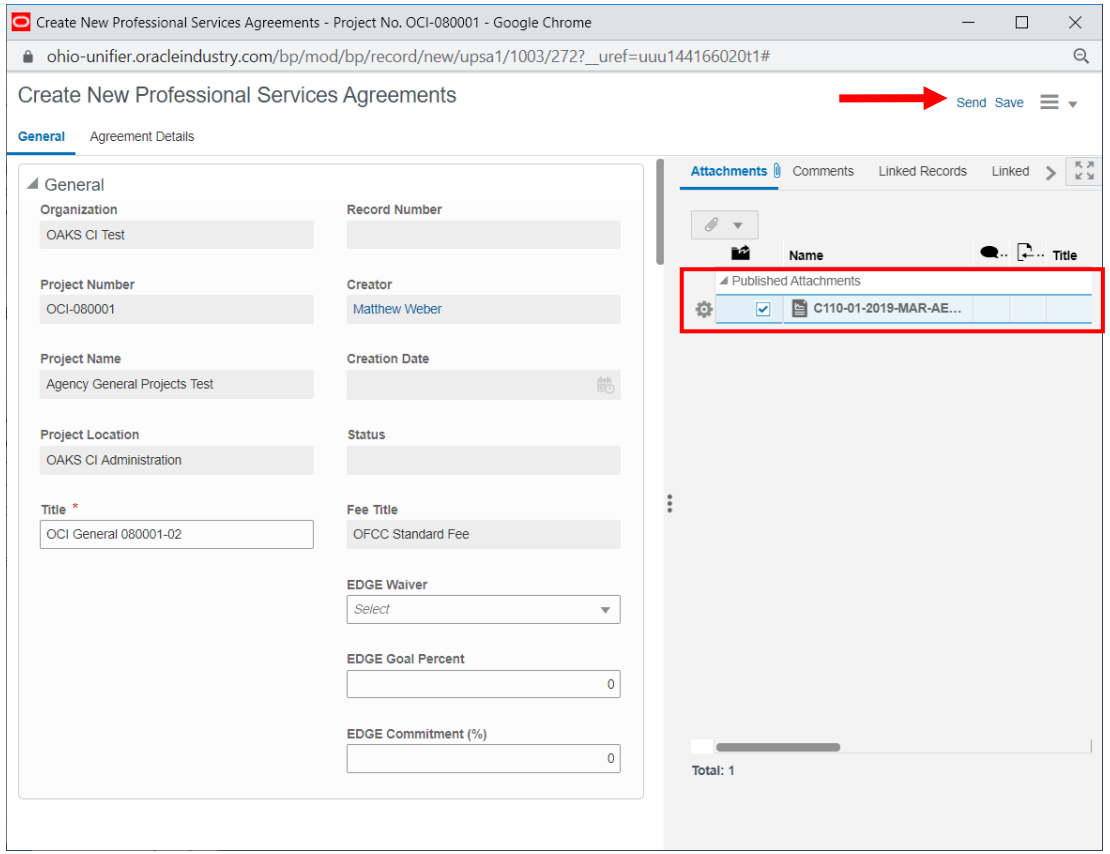


Professional Services (Consultant) Agreement Contracting Authority (Signature)

The Document Manager screen will close:

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

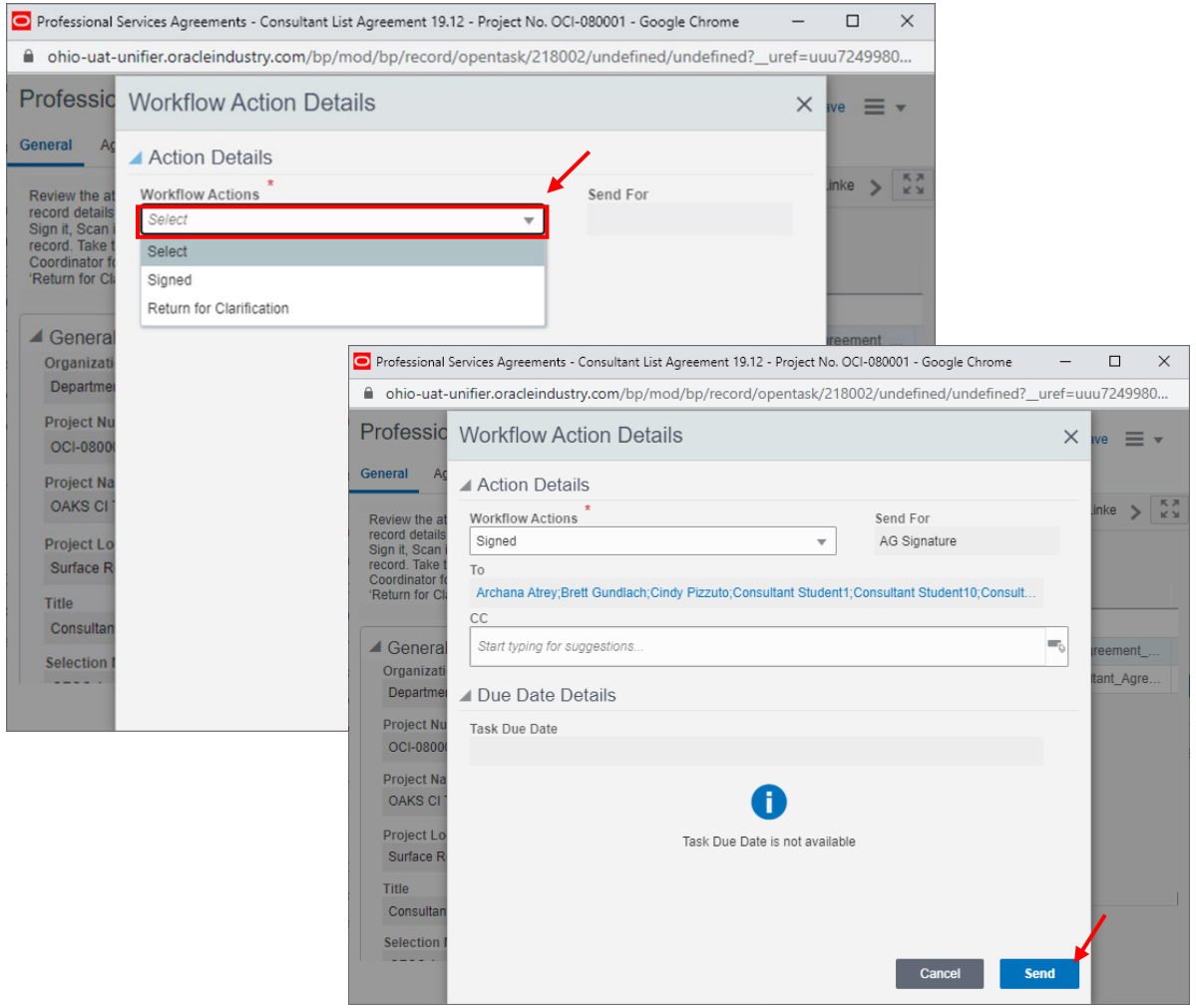
- When the record is ready to move forward, click **Send**



Professional Services (Consultant) Agreement Contracting Authority (Submit to ACC for Document Load)

- Choose: Workflow Action
  - ***If you choose 'Signed' the record will go to the ACC for Document Load***
  - ***If you choose 'Return for Clarification' record will go back to ACC for Update***

- Click **Send**

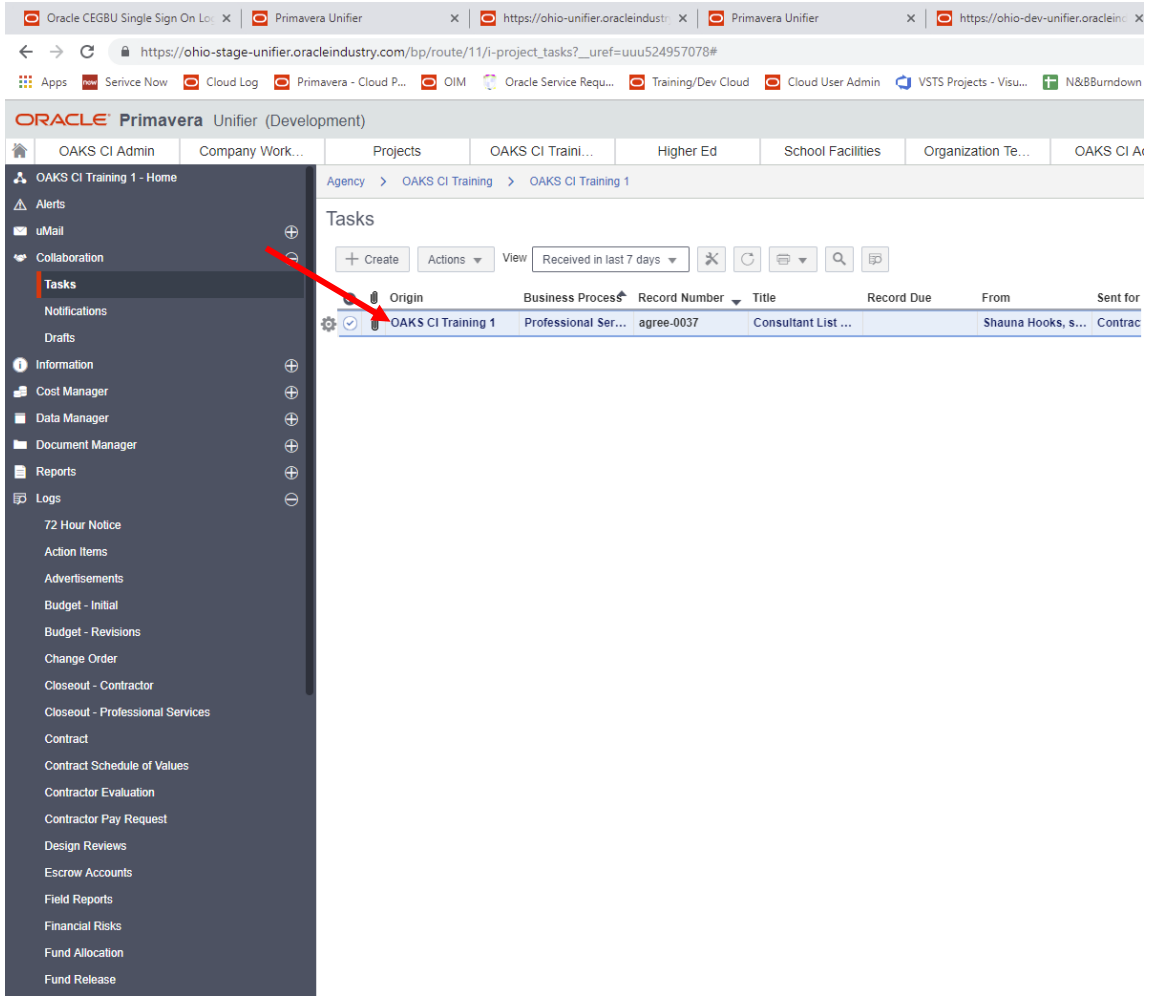


Professional Services (Consultant) Agreement ACC (Final Document Load)

Agency Consultant Coordinator will receive a notification from OAKS CI via email:

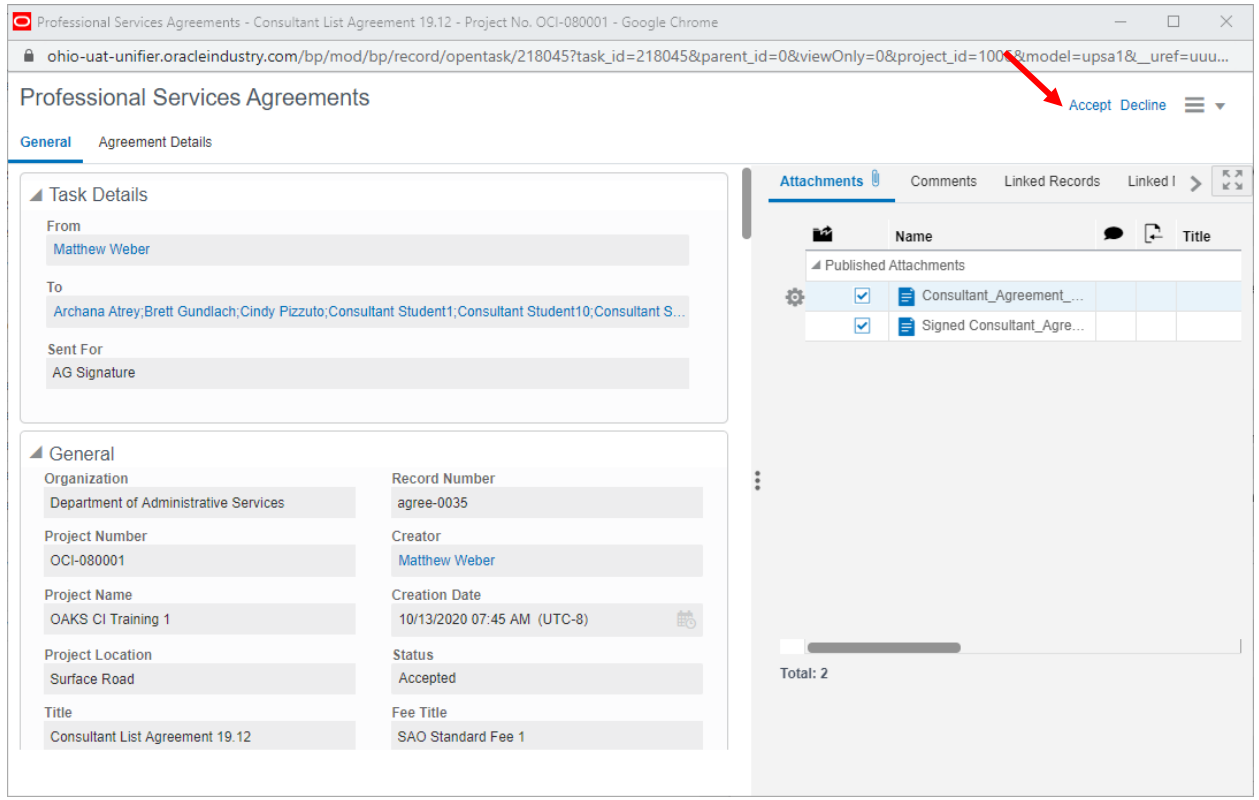
Click the link in the email or

- Log into your project
- Click Tasks
- Double click the record to open



Professional Services (Consultant) Agreement
ACC (Final Document Load-Submit to Project Manager)

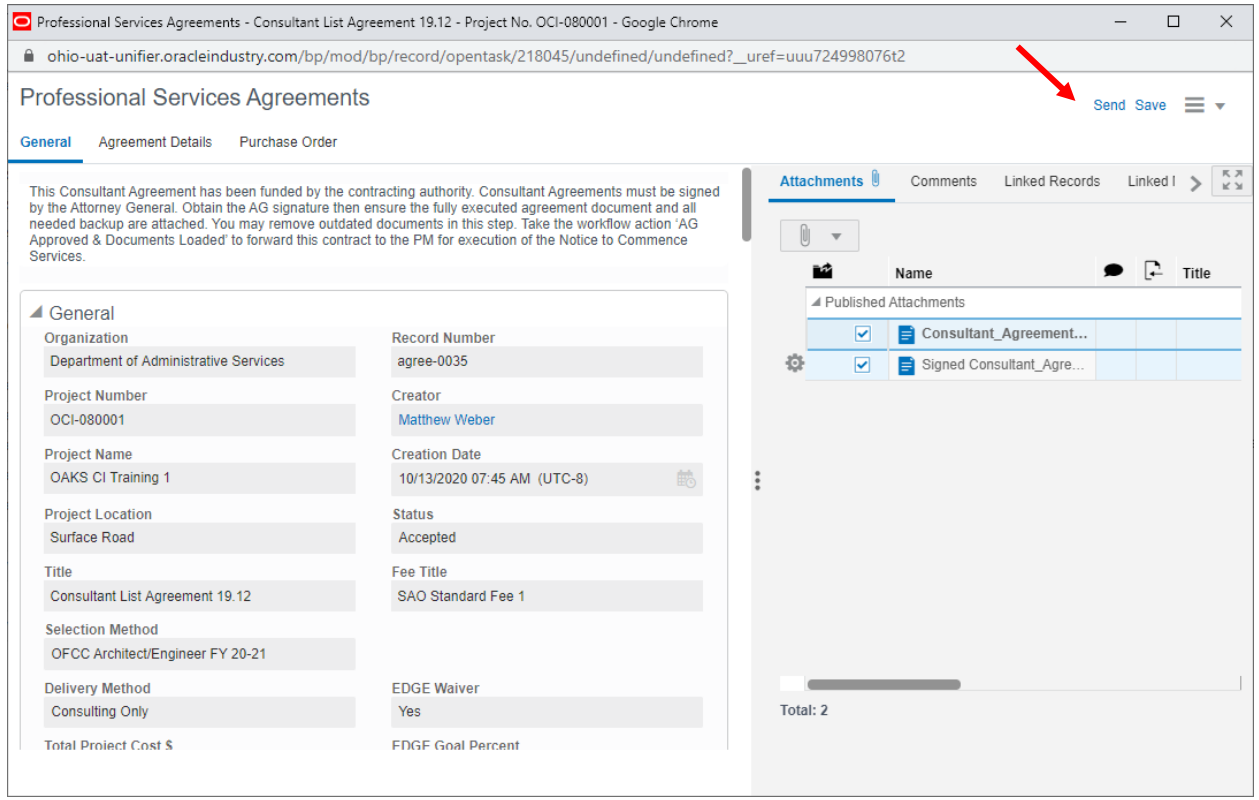
- Click: **Accept**



Professional Services (Consultant) Agreement
ACC (Final Document Load-Submit to Project Manager)

Review attached documents, ensure that all signatures have been acquired

➢ Click **Send**

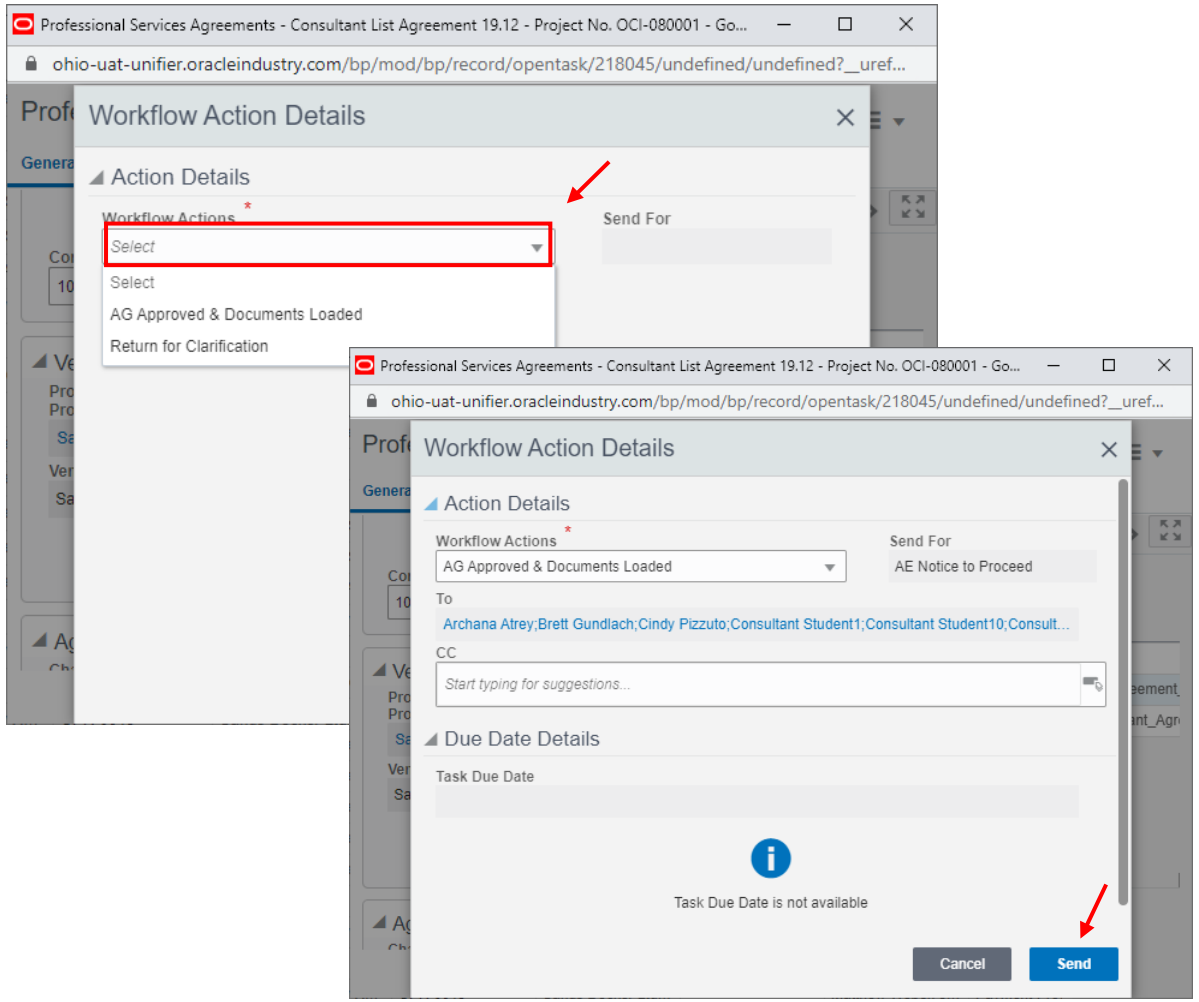


Professional Services (Consultant) Agreement ACC (Final Document Load-Submit to Project Manager)

- Choose: Workflow Action

- ***If you choose 'AG Approved & Documents Loaded'*** *The record will now go to the AE for "Notice to Commence Services"*

- Click **Send**

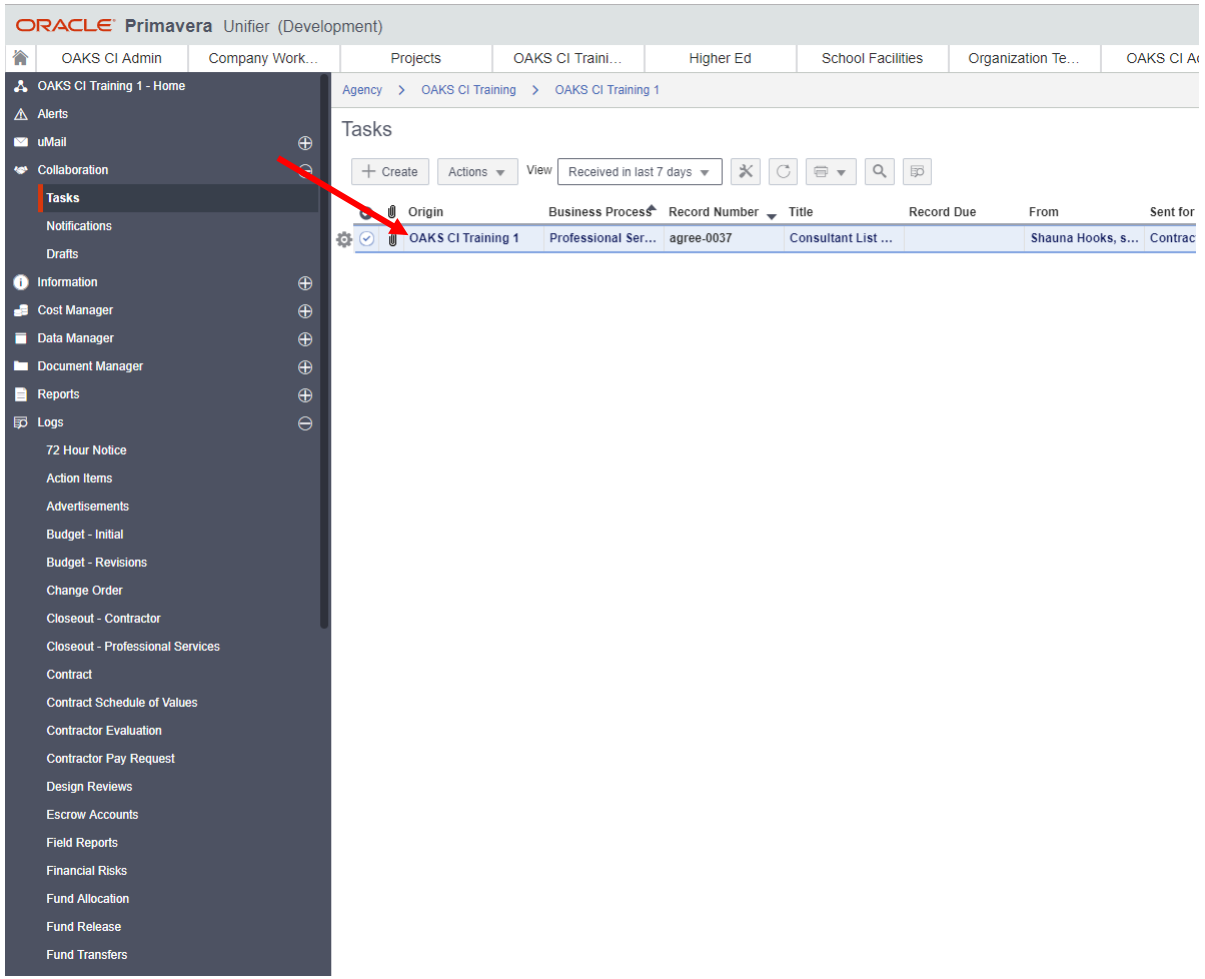


Professional Services (Consultant) Agreement Project Manager (Notice to Commence Services)

Project Manager will receive a notification from Unifier (OAKS CI) via email:

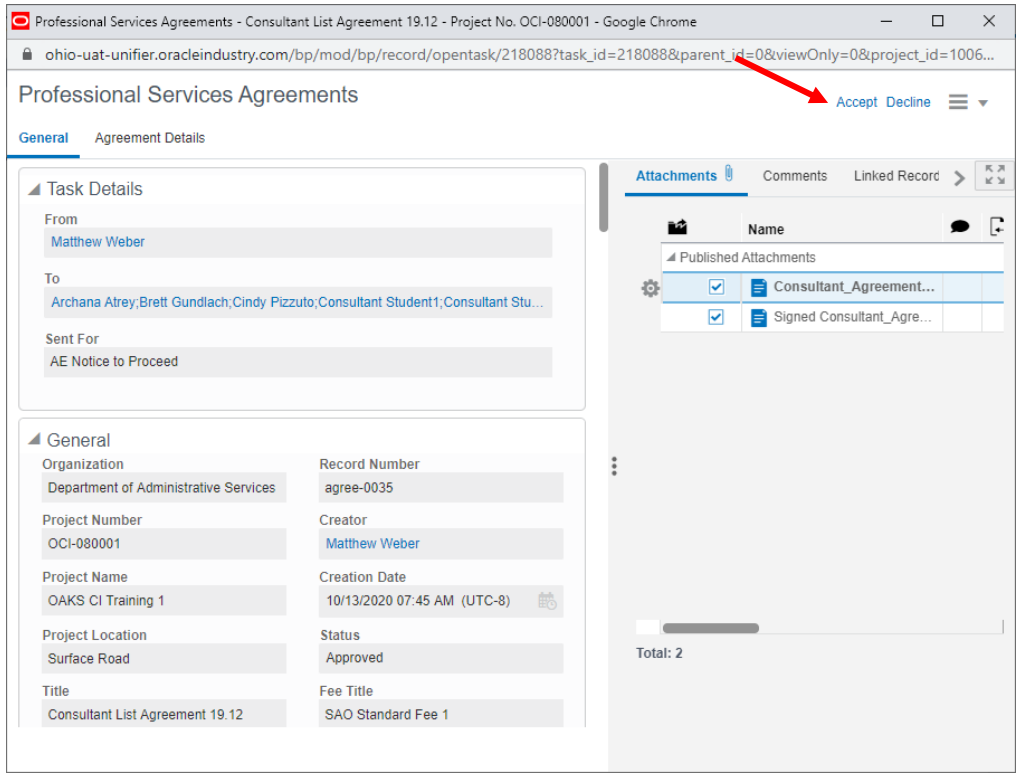
Click the link in the email or :

- Log into your project
- Click Tasks
- Double click the record to open



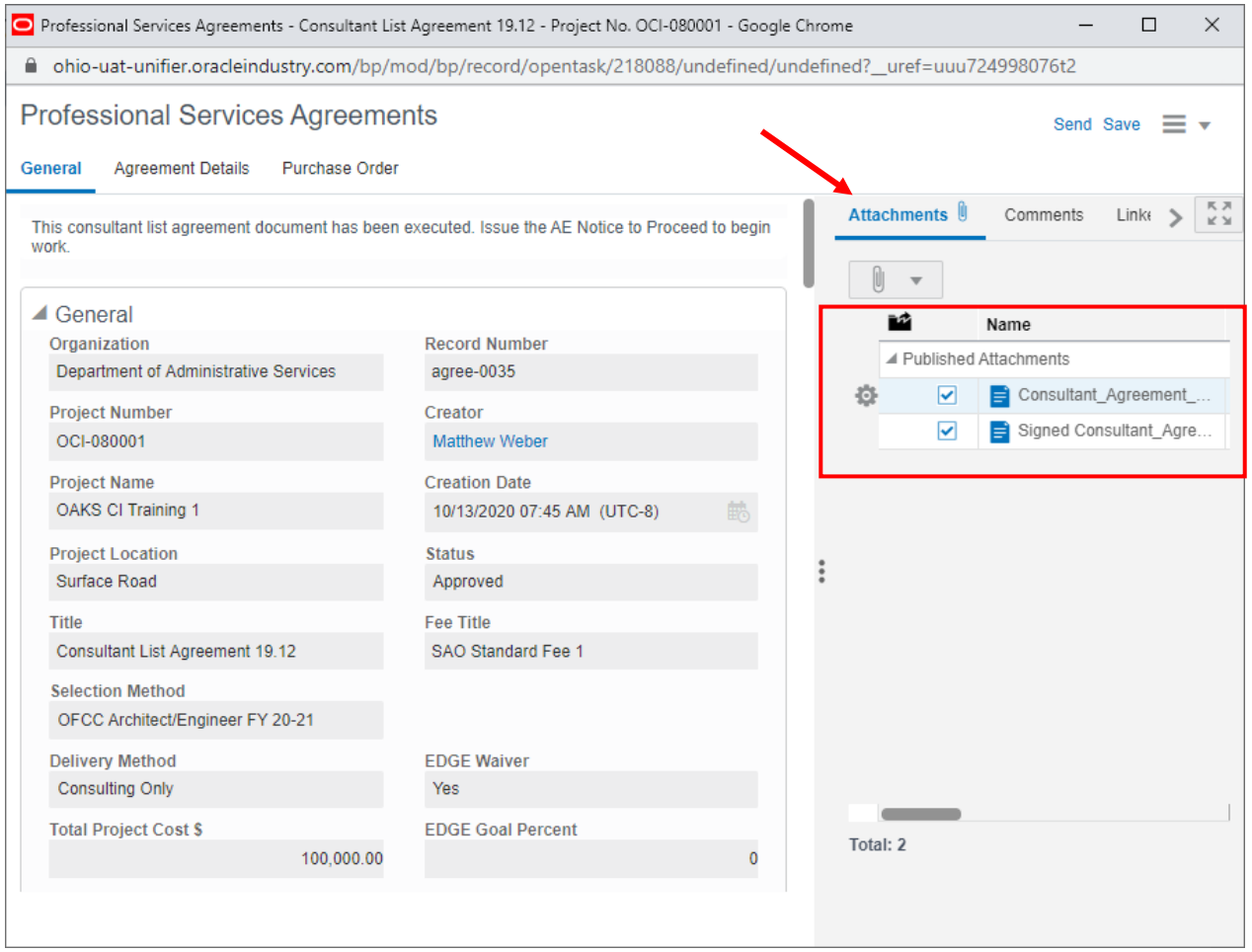
Professional Services (Consultant) Agreement Project Manager (Notice to Commence Services)

- Click **Accept**



Professional Services (Consultant) Agreement Project Manager (Notice to Commence Services)

- Review attached documents, ensure that all signatures have been acquired



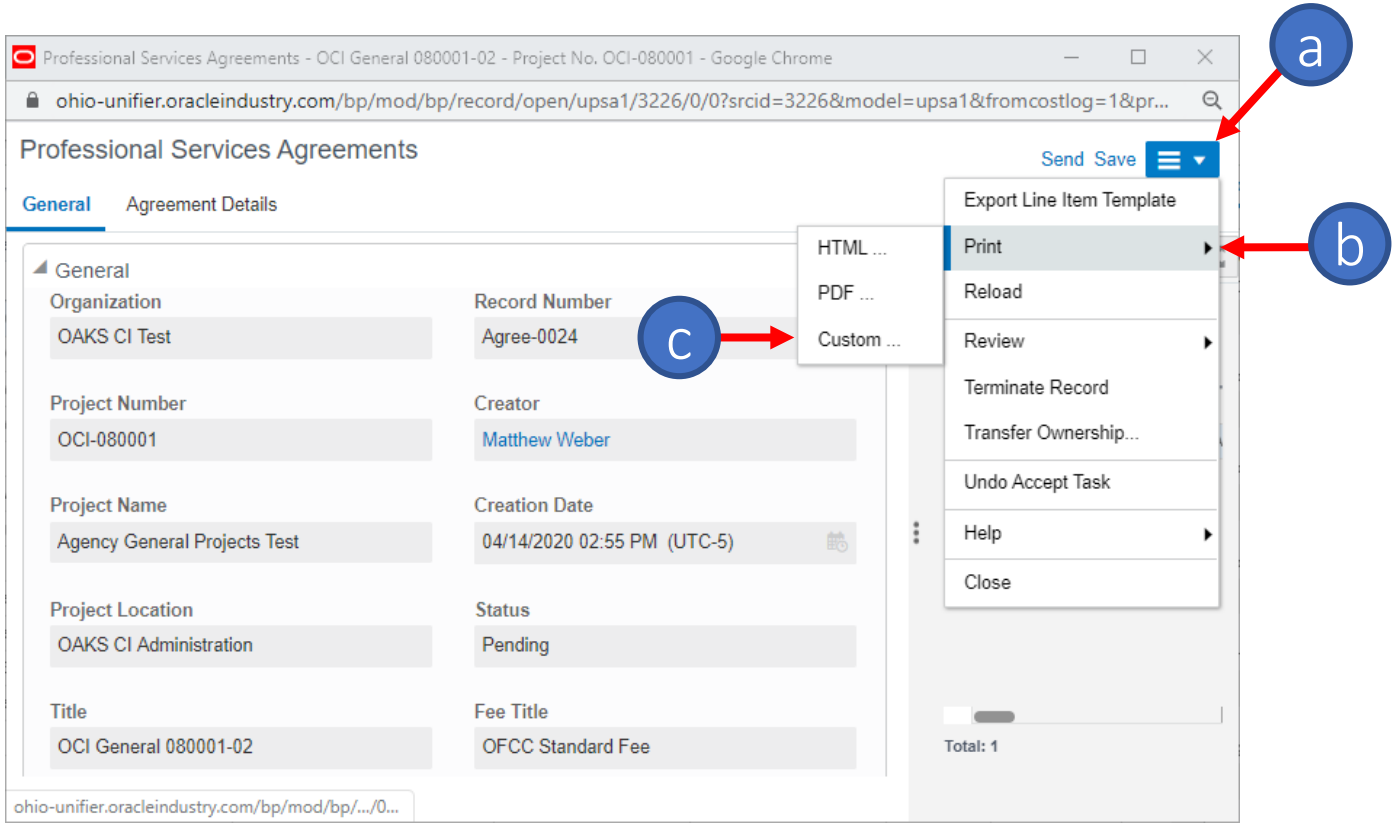
Professional Services (Consultant) Agreement Project Manager (Notice to Commence Services)

Once record is complete:

a) Click the Menu at the top right of the record

b) Click **Print**

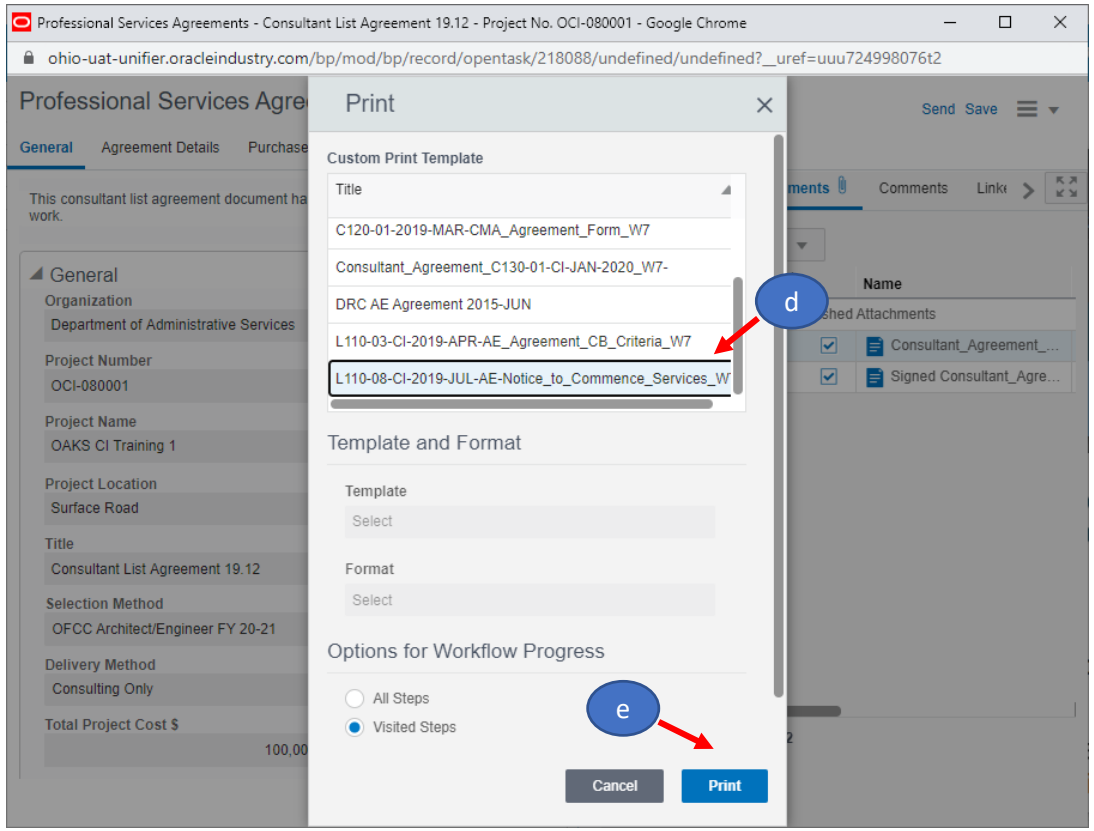
c) Select **Custom**



Professional Services (Consultant) Agreement Project Manager (Notice to Commence Services)

d. Select: **AE Notice to Commence Services**

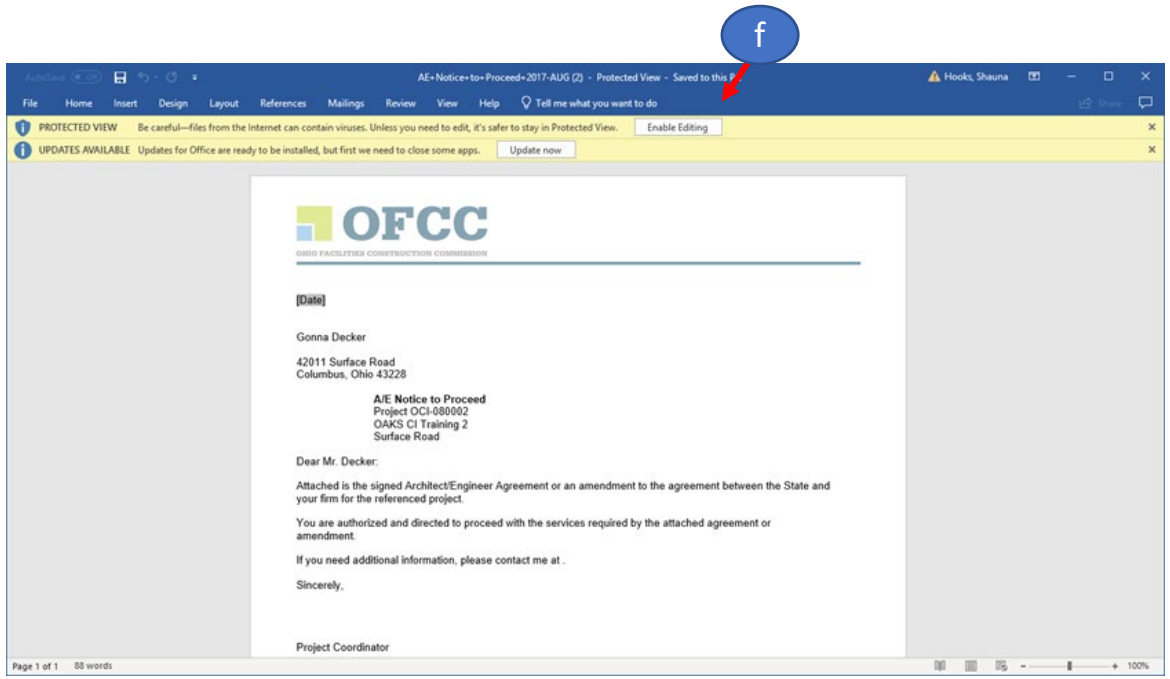
e. Click : **Print**



Professional Services (Consultant) Agreement Project Manager (Notice to Commence Services)

f. Open downloaded form, Click Enable editing

- Make updates as necessary
- Save Document to computer
- Attach Document to Record



Professional Services (Consultant) Agreement Project Manager (Notice to Commence Services)

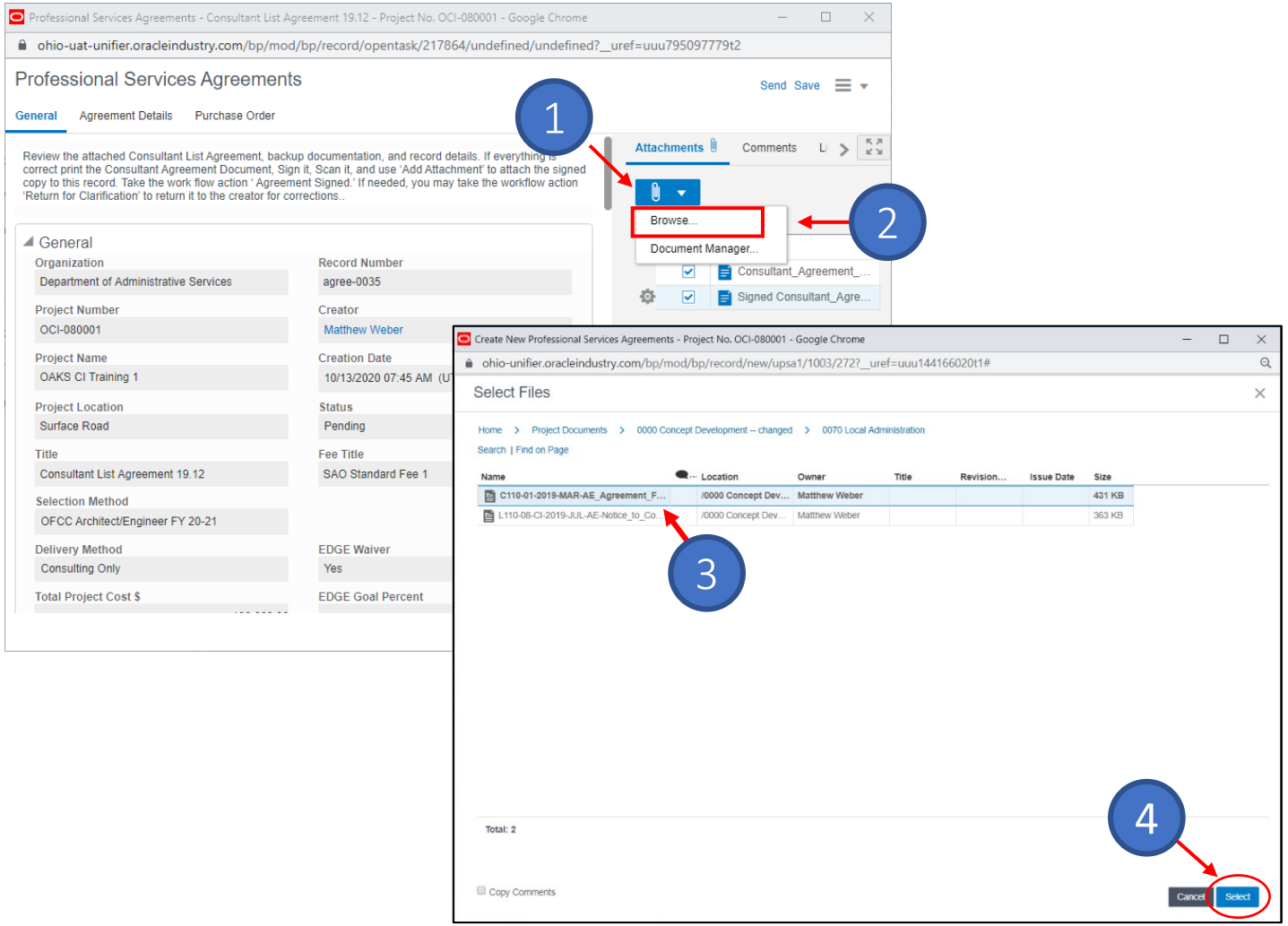
Attach all necessary documents:

1) Under the **Attachments** tab on the right side of the record, click the attachments button

2) Choose **Browse**

3) Navigate to the folder where the document is stored; select the document you wish to attach

4) Click **Select**

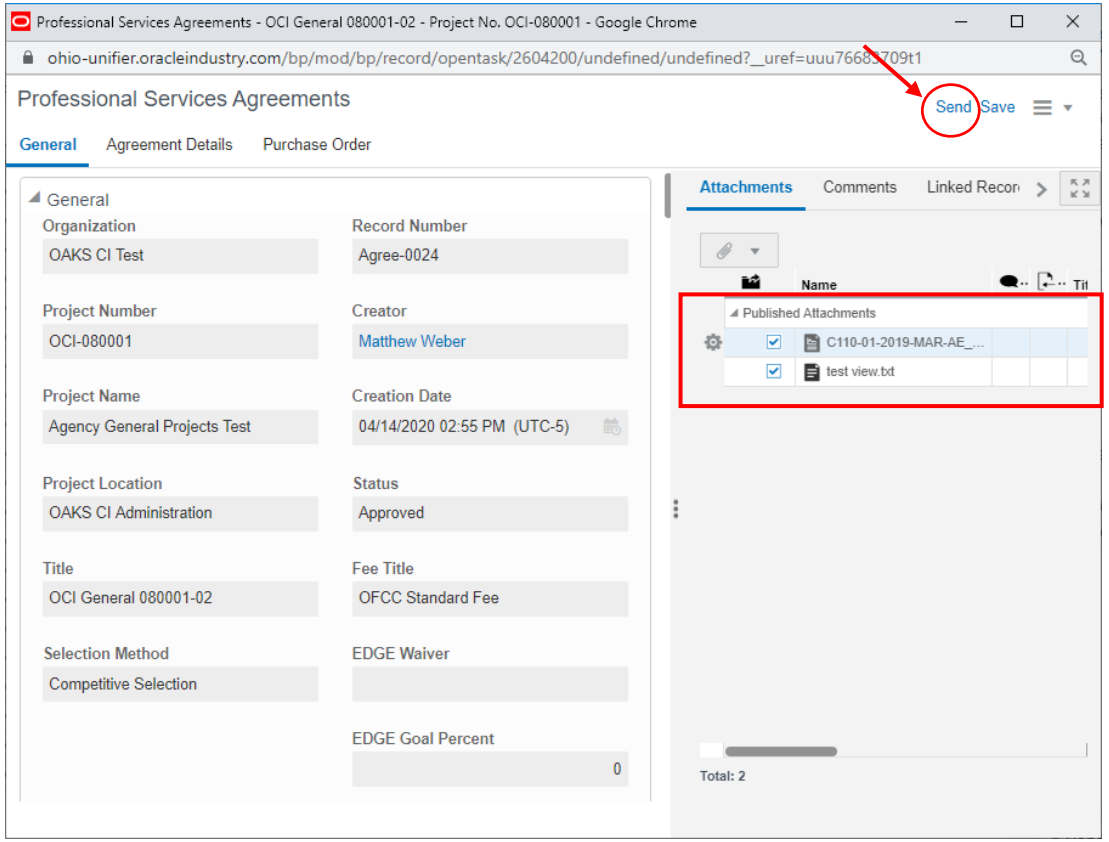


Professional Services (Consultant) Agreement Project Manager (Notice to Commence Services)

The Document screen will close:

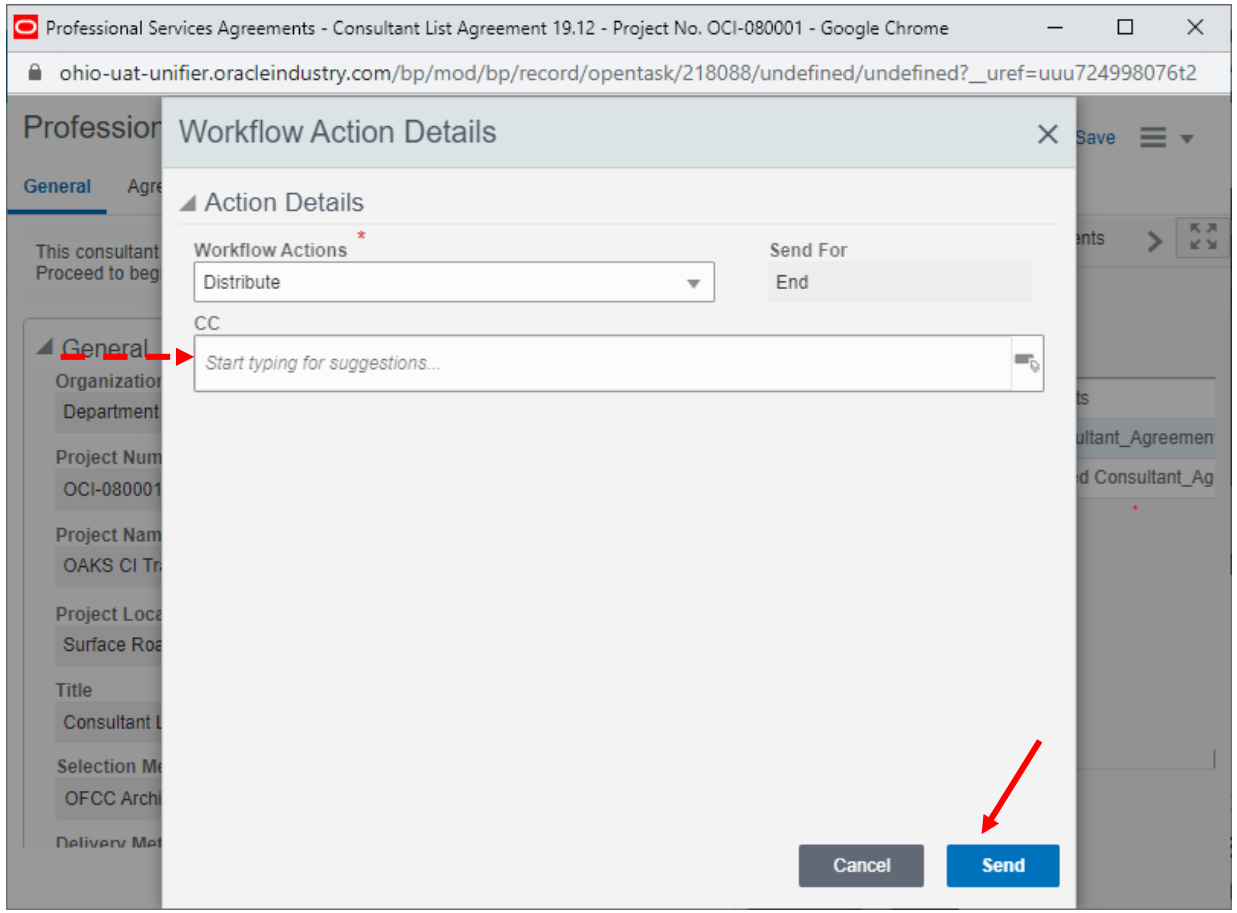
The added attachment(s) will be updated and display under the Attachments tab

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



Professional Services (Consultant) Agreement Project Manager (Notice to Commence Services)

- Verify Workflow
- Use the **CC** field to carbon copy other users in the project
- Click **Send** to Distribute
- ***The record will now end***



Professional Services (Consultant) Pay Requests

Create and Review

Professional Services (Consultant) Pay Request Purpose and 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
- ***Important reminder to all Consultants: Pay Request's which were previously created and approved in the SFC -999 project, must now be created and approved in the Local Project***
- Workflow:
  - You will continue to use the current workflow currently in place in your Locally Administered projects

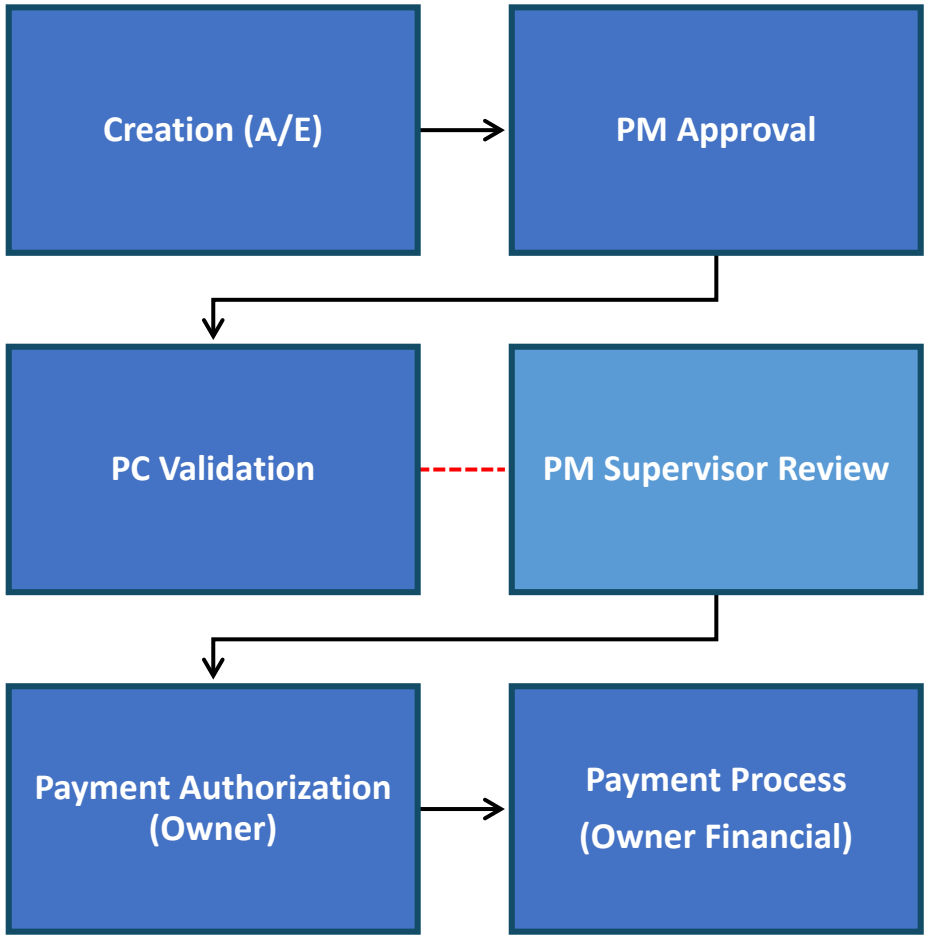
Professional Services (Consultant) Pay Request Consultant - Creation

- Consultant/AE:
  - Create the Professional Services (Consultant) (Consultant) Pay Request
  - Submit the Pay Request for Approval
  - **Note:** Any documents that must be attached to the pay request must be uploaded into Document Manager first
    - For information on Document Manager, please refer to the Job Aid located at the OFCC website, ofcc.ohio.gov

Professional Services Pay Request

- Workflow Steps

* PM Supervisor Review step only occurs when this pay request represents Final Payment. Otherwise Continue to the Payment Authorization step.



Click the boxes to navigate directly to each section

Subcontractor/Supplier Declaration Review Validation (PC)

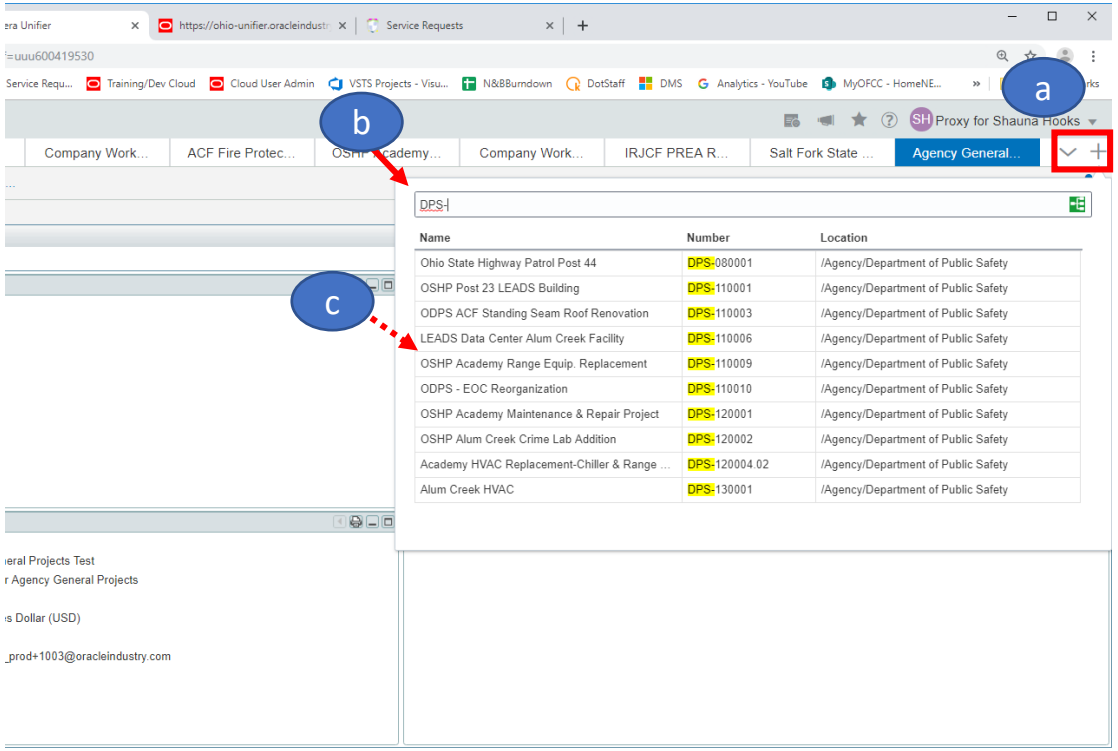
Professional Services Pay Request Creation (A/E)

- Log into OAKS CI

  a. Click + sign

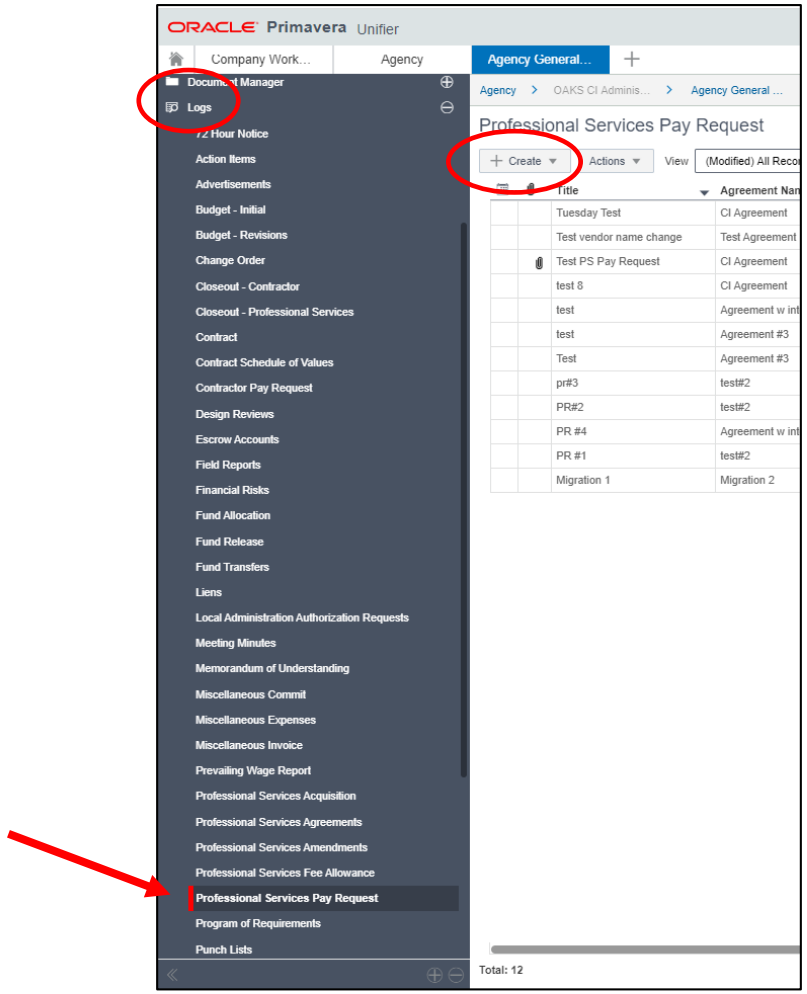
  b. Type project name or number in search bar

  c. Click appropriate project to open



Professional Services Pay Request – Create (A/E)

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

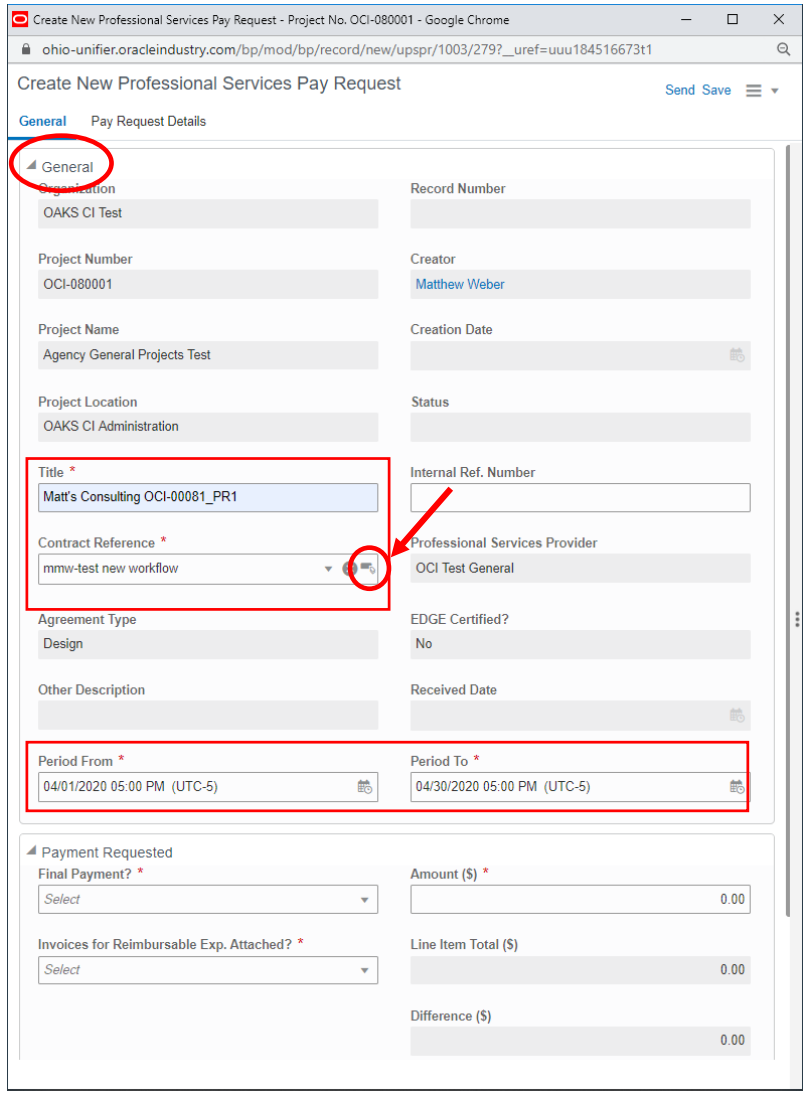


Professional Services Pay Request – Create (A/E)

a) Enter the required * fields in the General section

- Enter the Title
- Select Contract Reference
- Select Period From and Period To

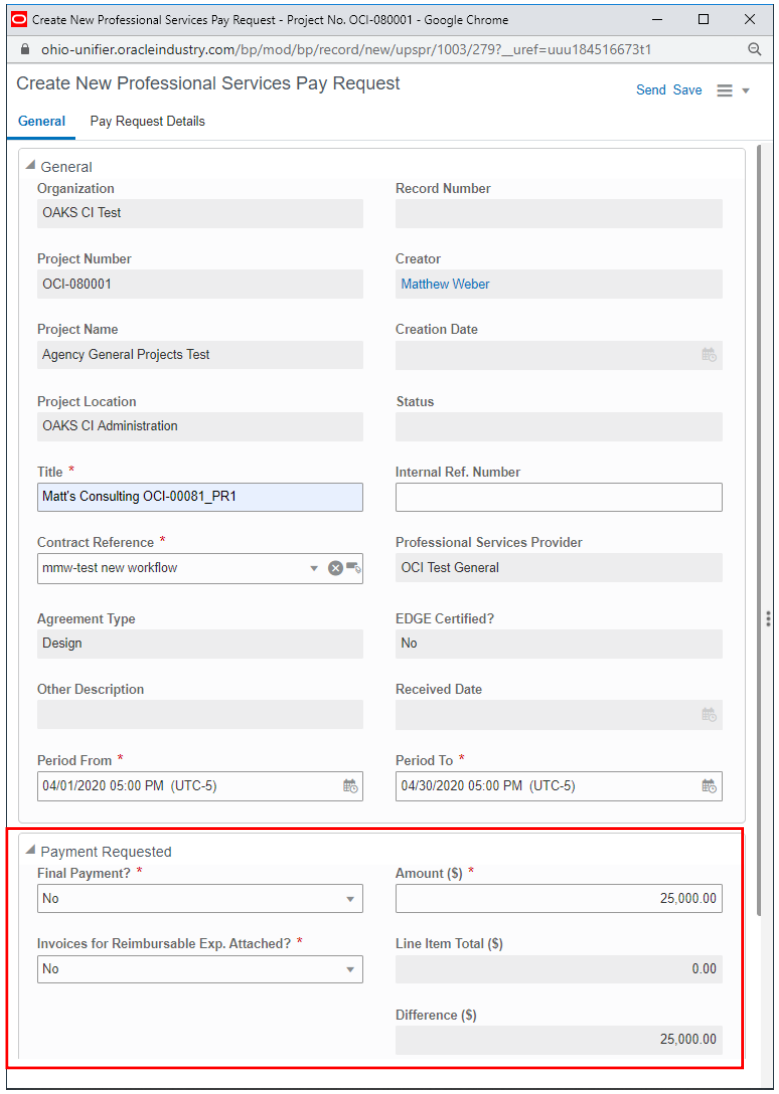
a



Professional Services Pay Request – Create (A/E)

b) Enter the required * fields in the Payment Requested section

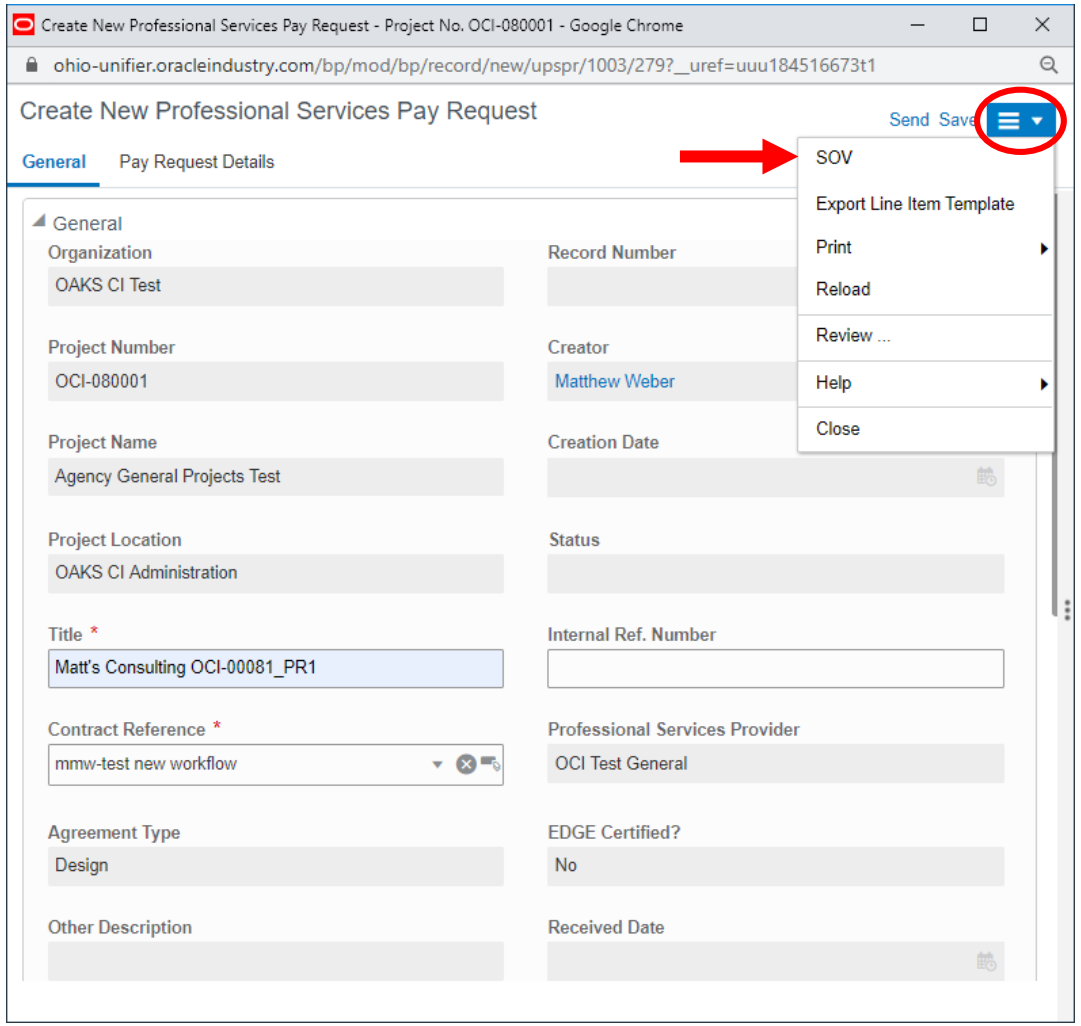
- Final Payment
  - Select Yes if this is the final pay request for this agreement
- Invoices for Reimbursable Exp. Attached?
  - Select Yes if invoices are attached
- Amount ($)
  - Enter the amount of the current payment request



b

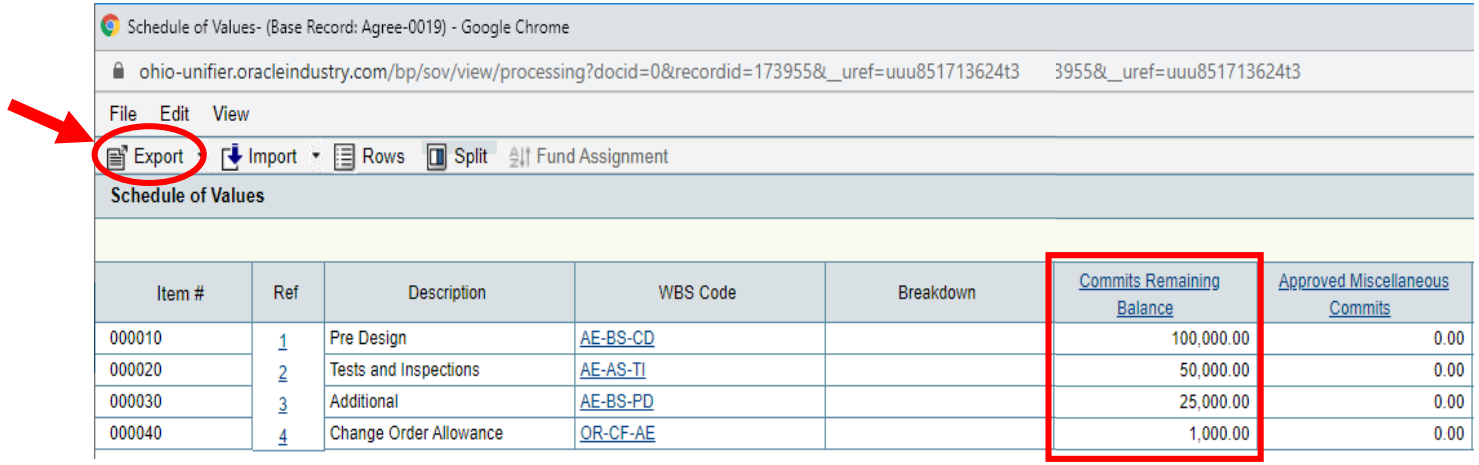
Professional Services Pay Request – Create (A/E)

- 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 at the top right of the record and select **SOV**



Professional Services Pay Request – Create (A/E)

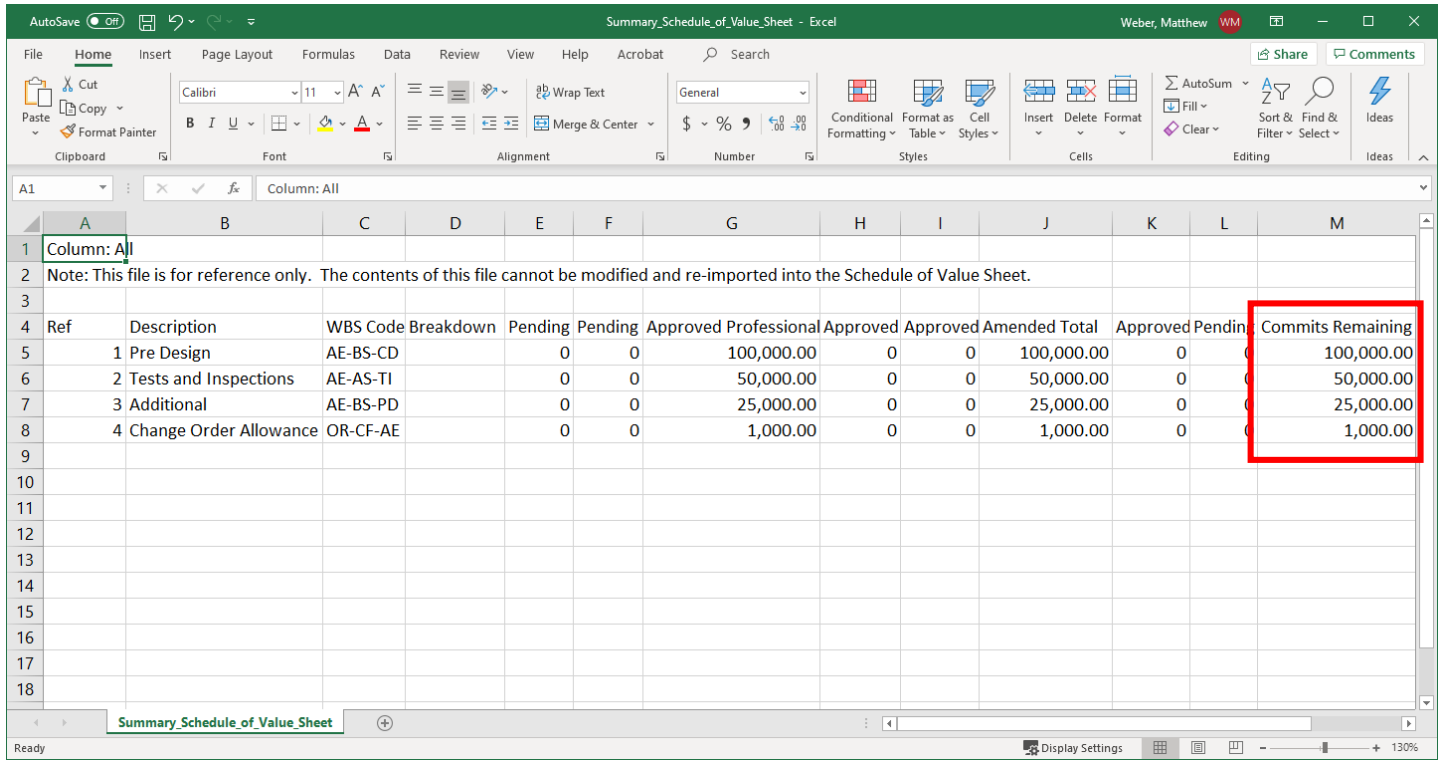
- This allows you to look at the Scheduled Value and Commits Remaining Balance for each of the line items on your SOV (you may need to scroll to the right to find the column)
- You can also export the SOV to Excel by clicking Export and choosing the Summary Schedule of Values Sheet



Item #	Ref	Description	WBS Code	Breakdown	Commits Remaining Balance	Approved Miscellaneous Commits
000010	1	Pre Design	AE-BS-CD		100,000.00	0.00
000020	2	Tests and Inspections	AE-AS-TI		50,000.00	0.00
000030	3	Additional	AE-BS-PD		25,000.00	0.00
000040	4	Change Order Allowance	OR-CF-AE		1,000.00	0.00

Professional Services Pay Request – Create (A/E)

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



Column: All

Note: This file is for reference only. The contents of this file cannot be modified and re-imported into the Schedule of Value Sheet.

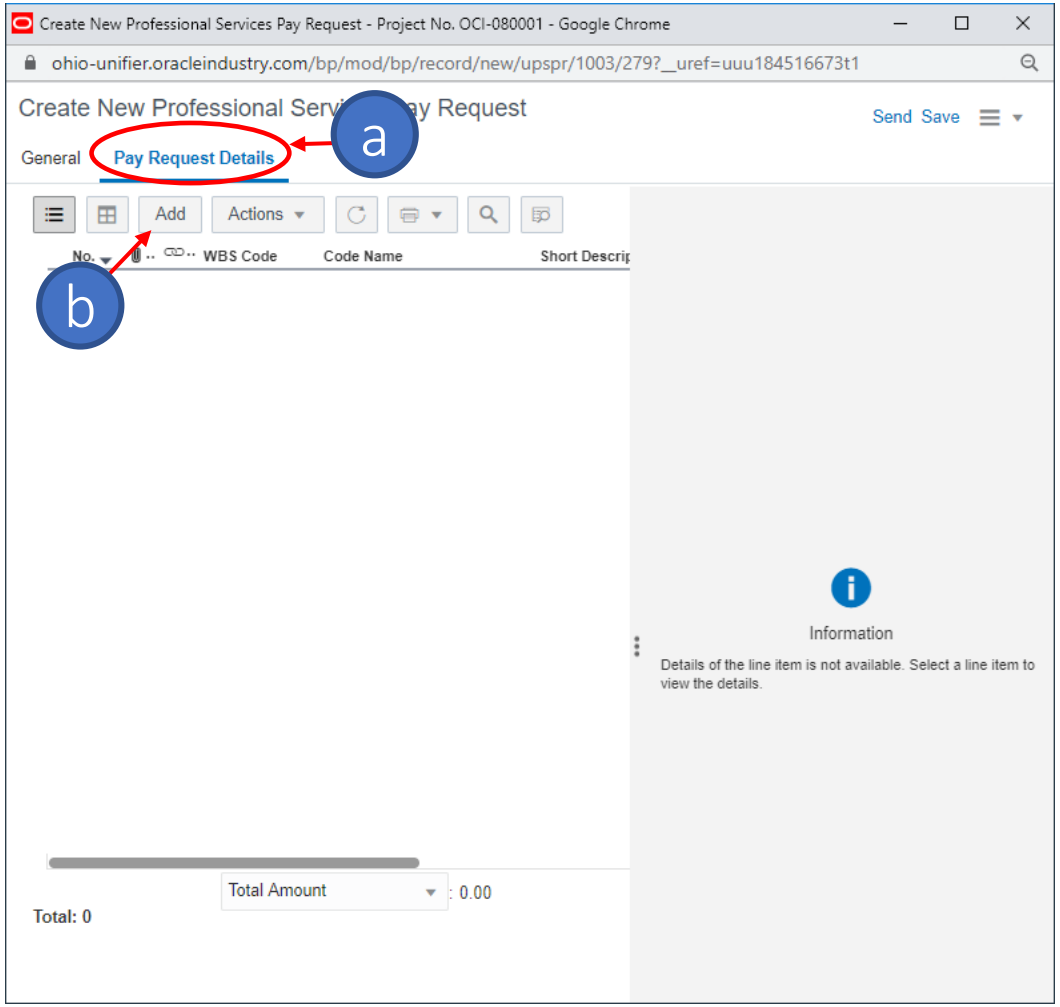
Ref	Description	WBS Code	Breakdown	Pending	Pending	Approved Professional	Approved	Approved	Amended Total	Approved	Pendin	Commits Remaining
1	Pre Design	AE-BS-CD		0	0	100,000.00	0	0	100,000.00	0	0	100,000.00
2	Tests and Inspections	AE-AS-TI		0	0	50,000.00	0	0	50,000.00	0	0	50,000.00
3	Additional	AE-BS-PD		0	0	25,000.00	0	0	25,000.00	0	0	25,000.00
4	Change Order Allowance	OR-CF-AE		0	0	1,000.00	0	0	1,000.00	0	0	1,000.00

Professional Services Pay Request – Create (A/E)

- Enter a line item corresponding to each item on the Schedule of Values (SOV) from the agreement for which payment is requested

  a) Open the Pay Request Details tab

  b) Click the Add button



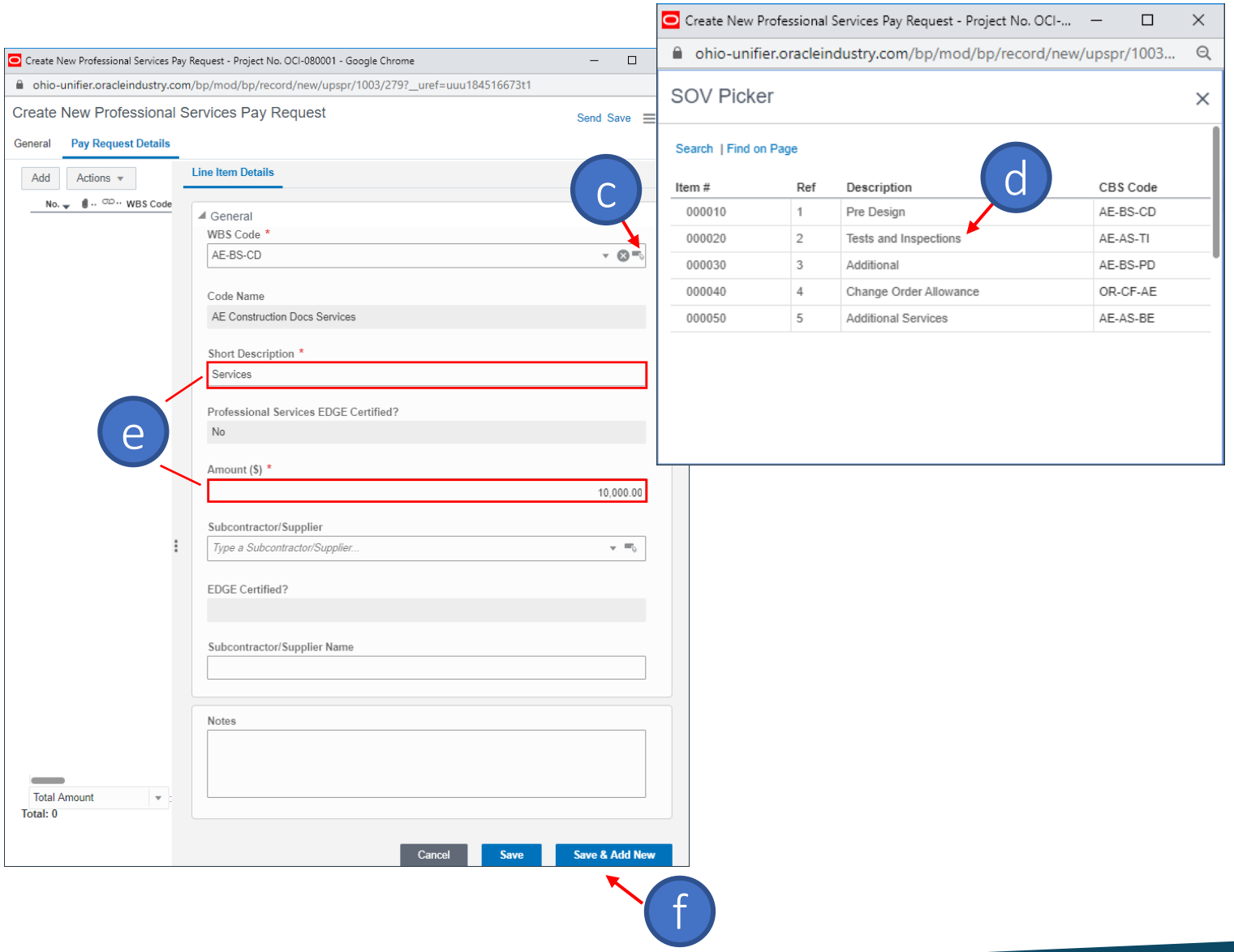
Professional Services Pay Request – Create (A/E)

c) Click on the arrow next to WBS Code

d) Choose the appropriate line item

e) Enter a Short Description and the Amount

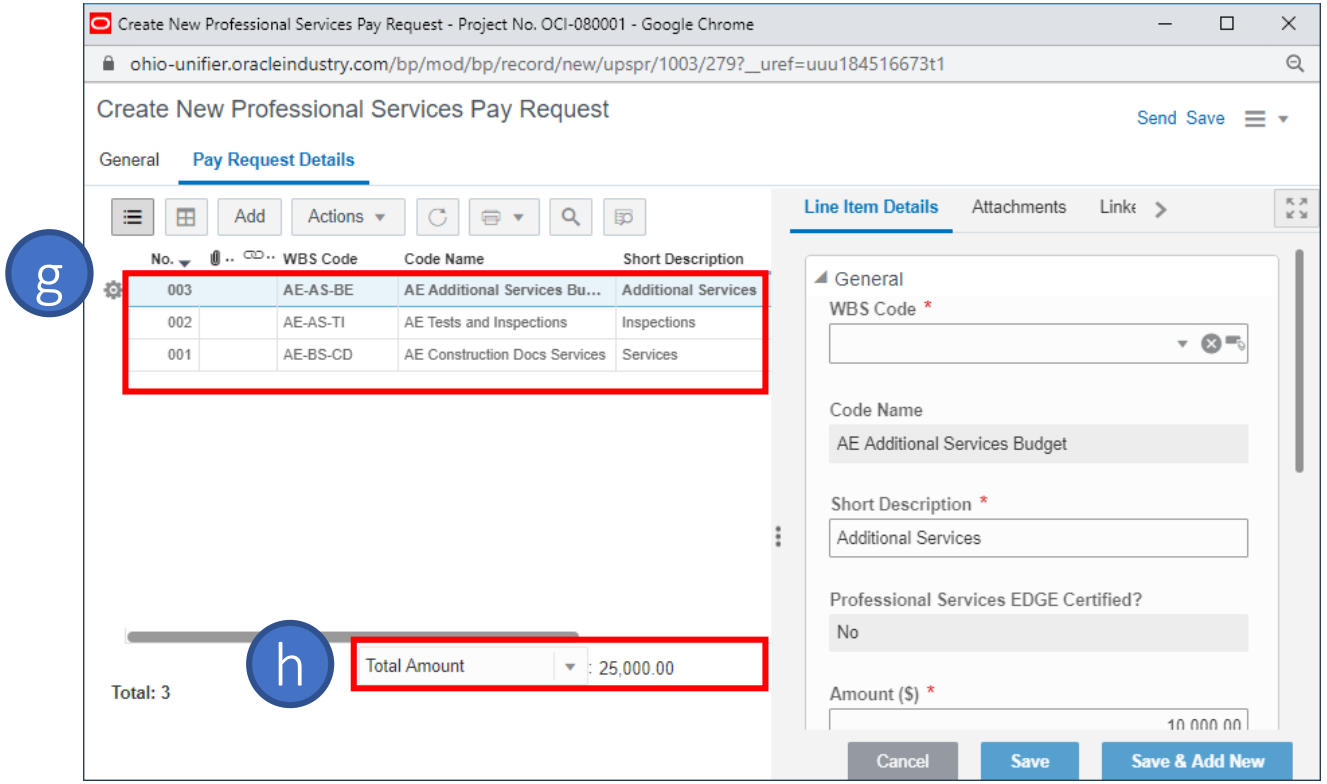
f) To add additional lines, click **Save & Add New**, otherwise click **Save**



Professional Services Pay Request – Create (A/E)

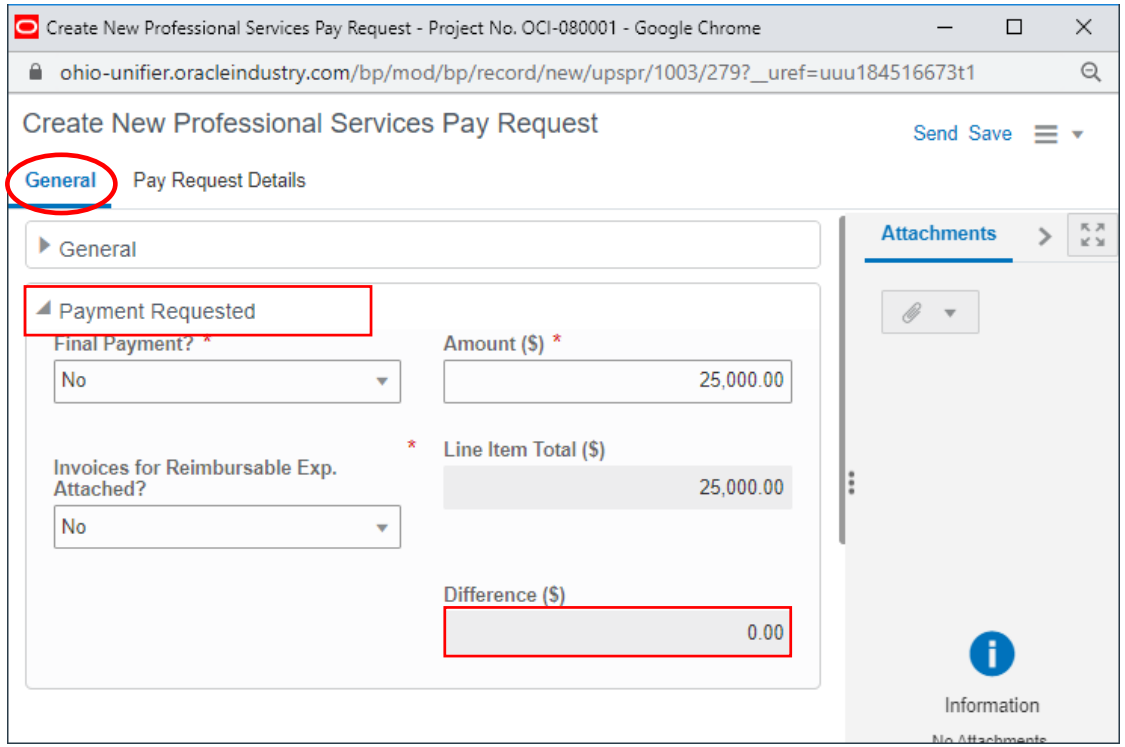
g) Once all lines have been added, the Line Item information will display

h) Note the Total Amount field at the bottom of the record



Professional Services Pay Request – Create (A/E)

- Open the General tab and scroll down to the Payment Requested Section
- Ensure that the Total Amount displayed from the Pay Request Details tab equals the Amount entered in the Payment Requested section, and the Difference equals $0.00



Professional Services Pay Request – Attach Supporting Documentation

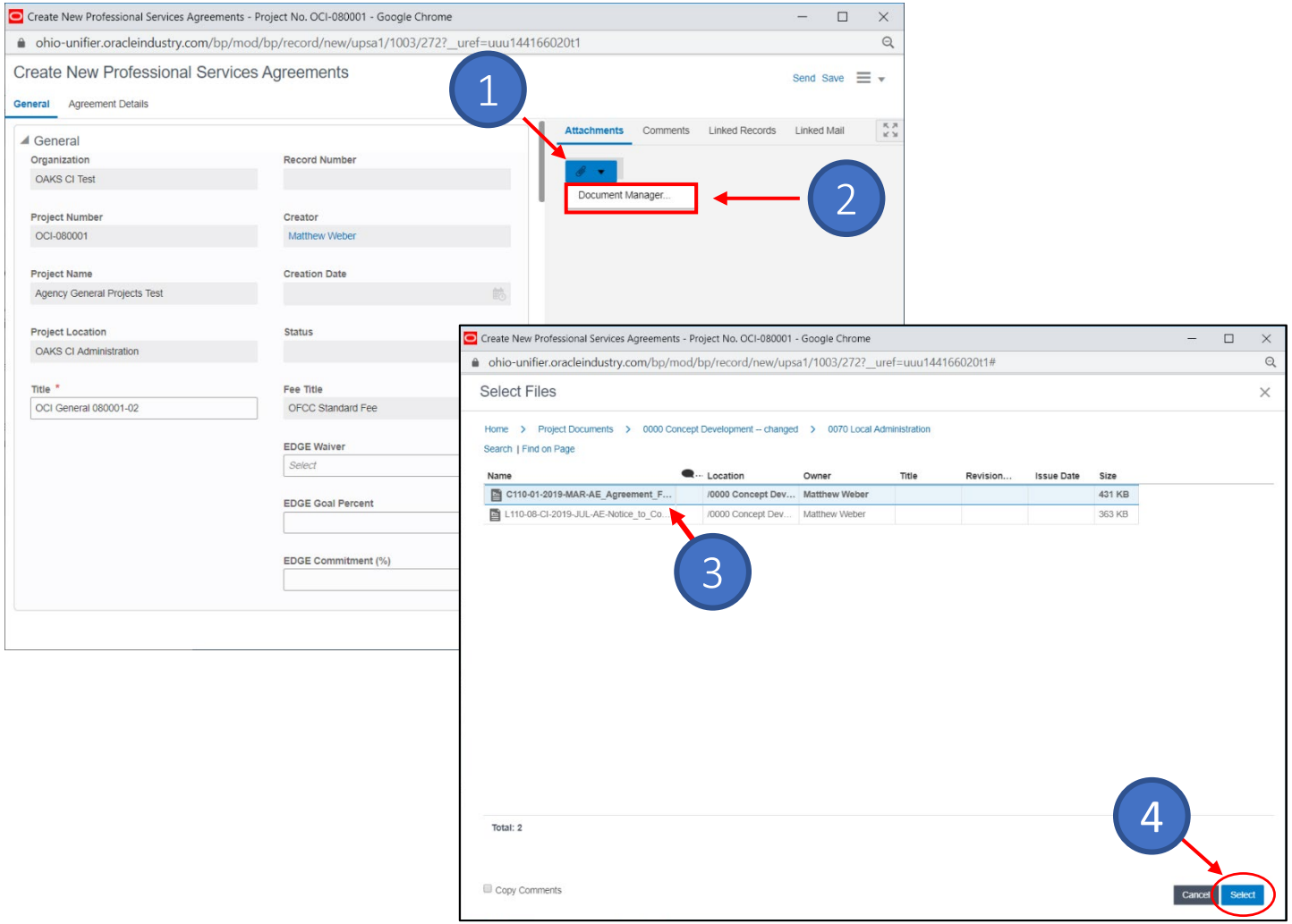
Upload all documents to [Document Manager] *prior to attaching documents*

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**

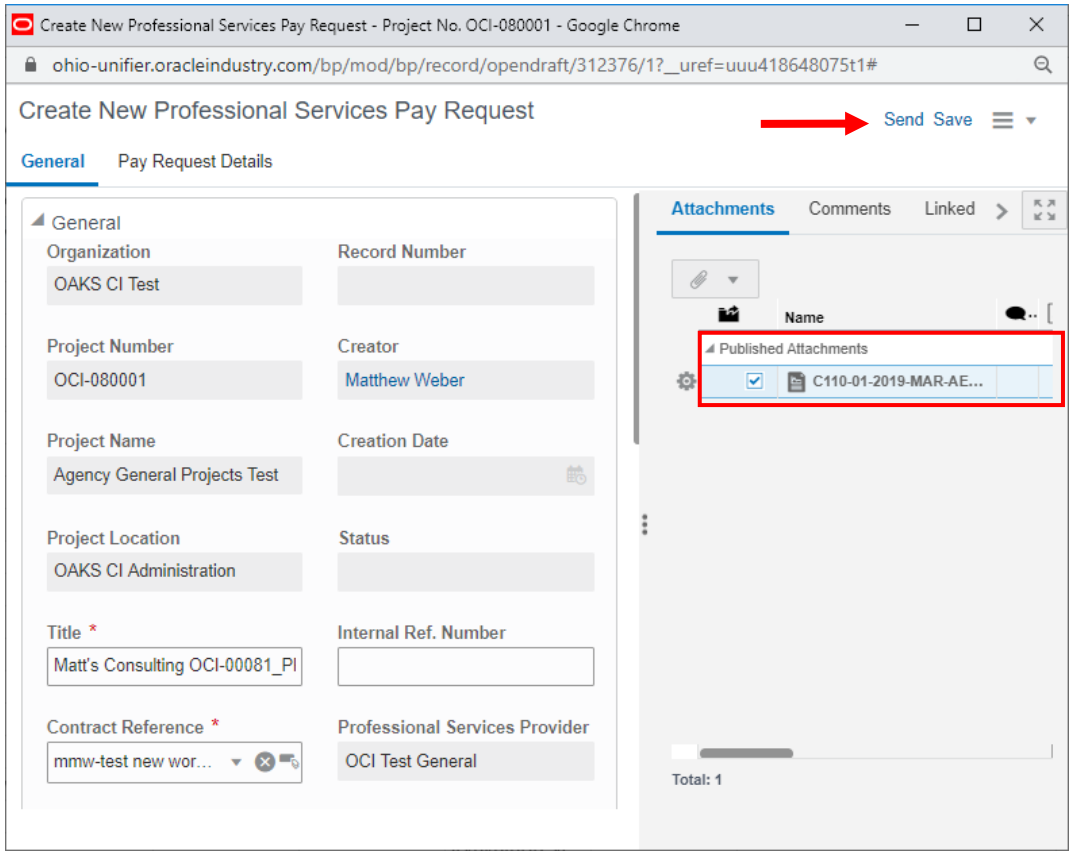


Professional Services Pay Request – Create (A/E)

The Document Manager screen will close:

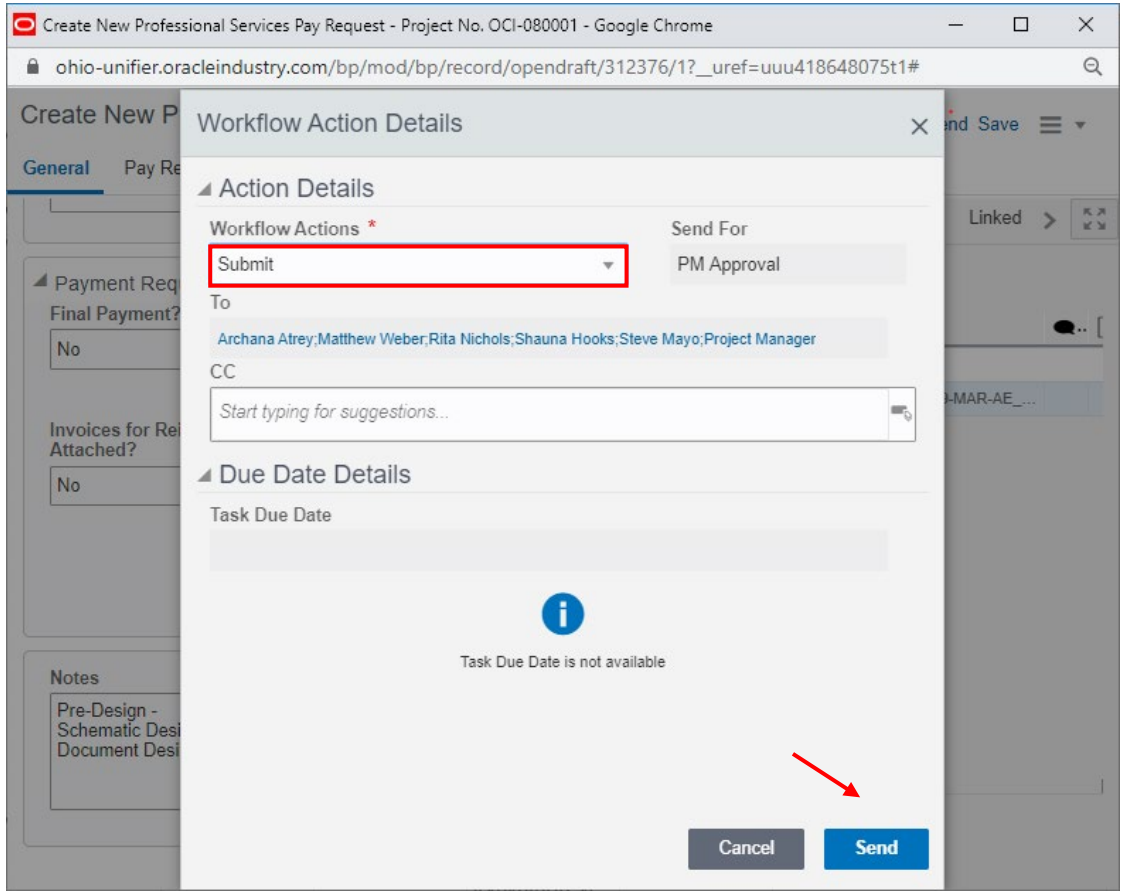
The added attachment(s) will be updated and display under the Attachments tab

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



Professional Services Pay Request – Create (A/E)

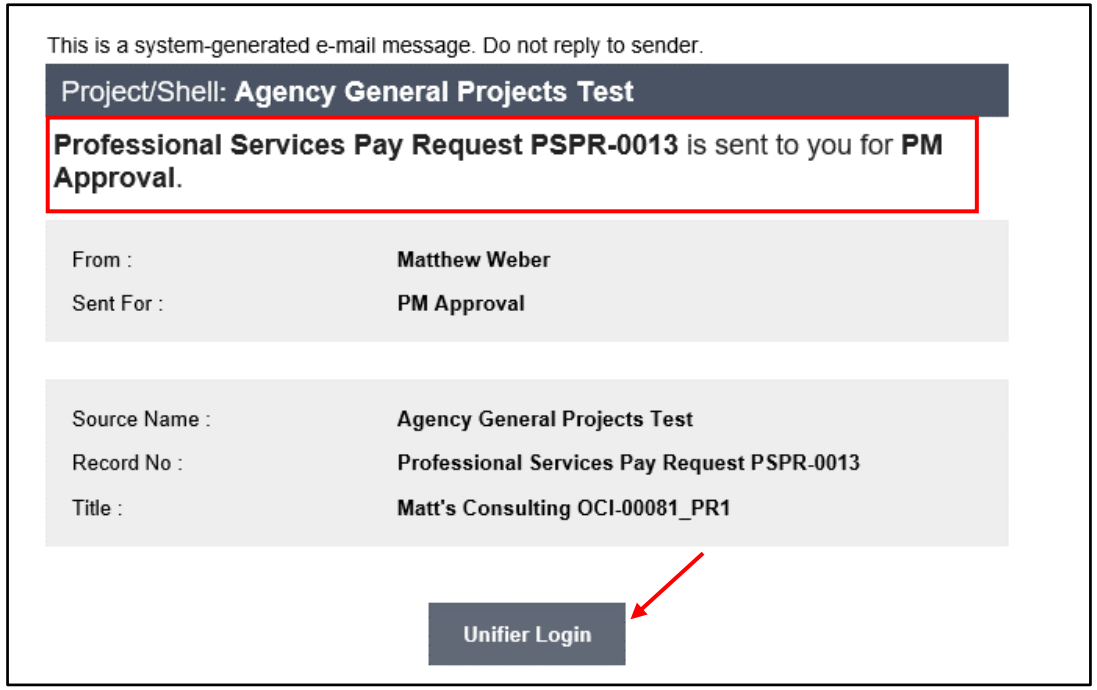
- Verify Workflow Action
- Click **Send**
- The record will now go to PM Approval



Professional Services Pay Request
PM Approval

Professional Services Pay Request PM Approval

- PM receives an Email
- Click on the “Unifier Login” button to access the task


This is a system-generated e-mail message. Do not reply to sender.

Project/Shell: **Agency General Projects Test**

Professional Services Pay Request PSPR-0013 is sent to you for **PM Approval**.

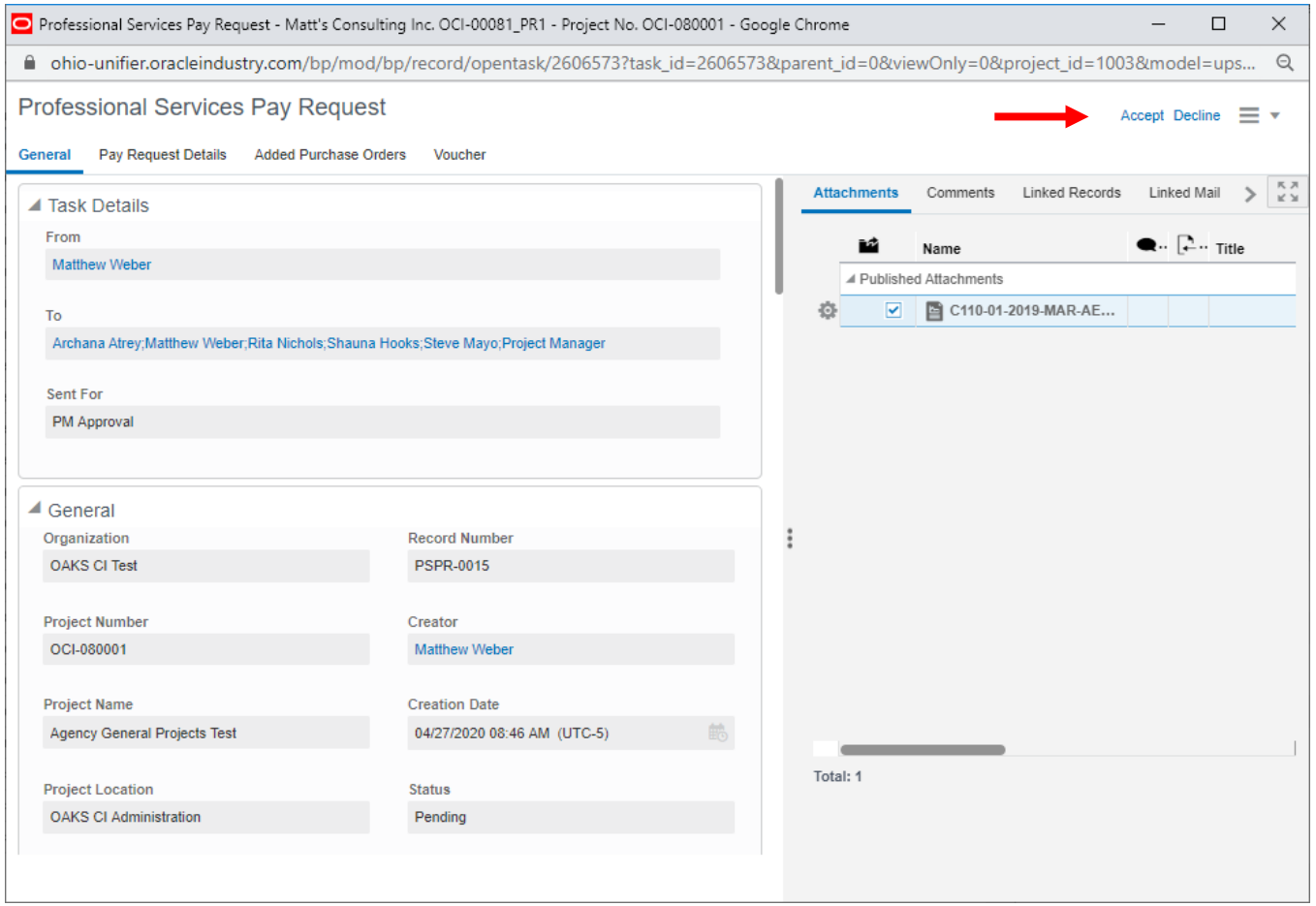
From :	**Matthew Weber**
Sent For :	**PM Approval**

Source Name :	**Agency General Projects Test**
Record No :	**Professional Services Pay Request PSPR-0013**
Title :	**Matt's Consulting OCI-00081_PR1**

Unifier Login

PM Approval

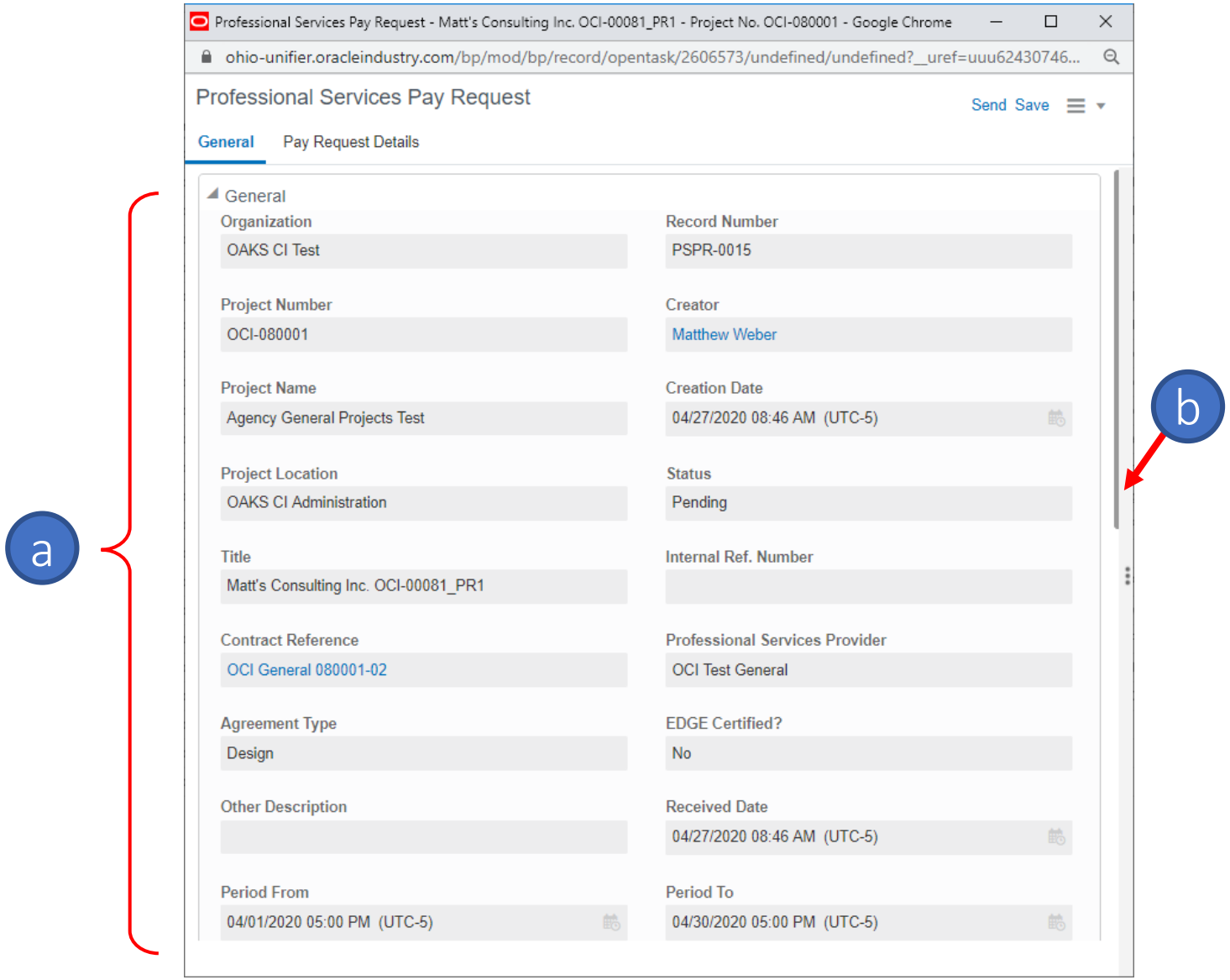
- Click Accept to begin work on the task



PM Approval

a) Review the information in the General tab

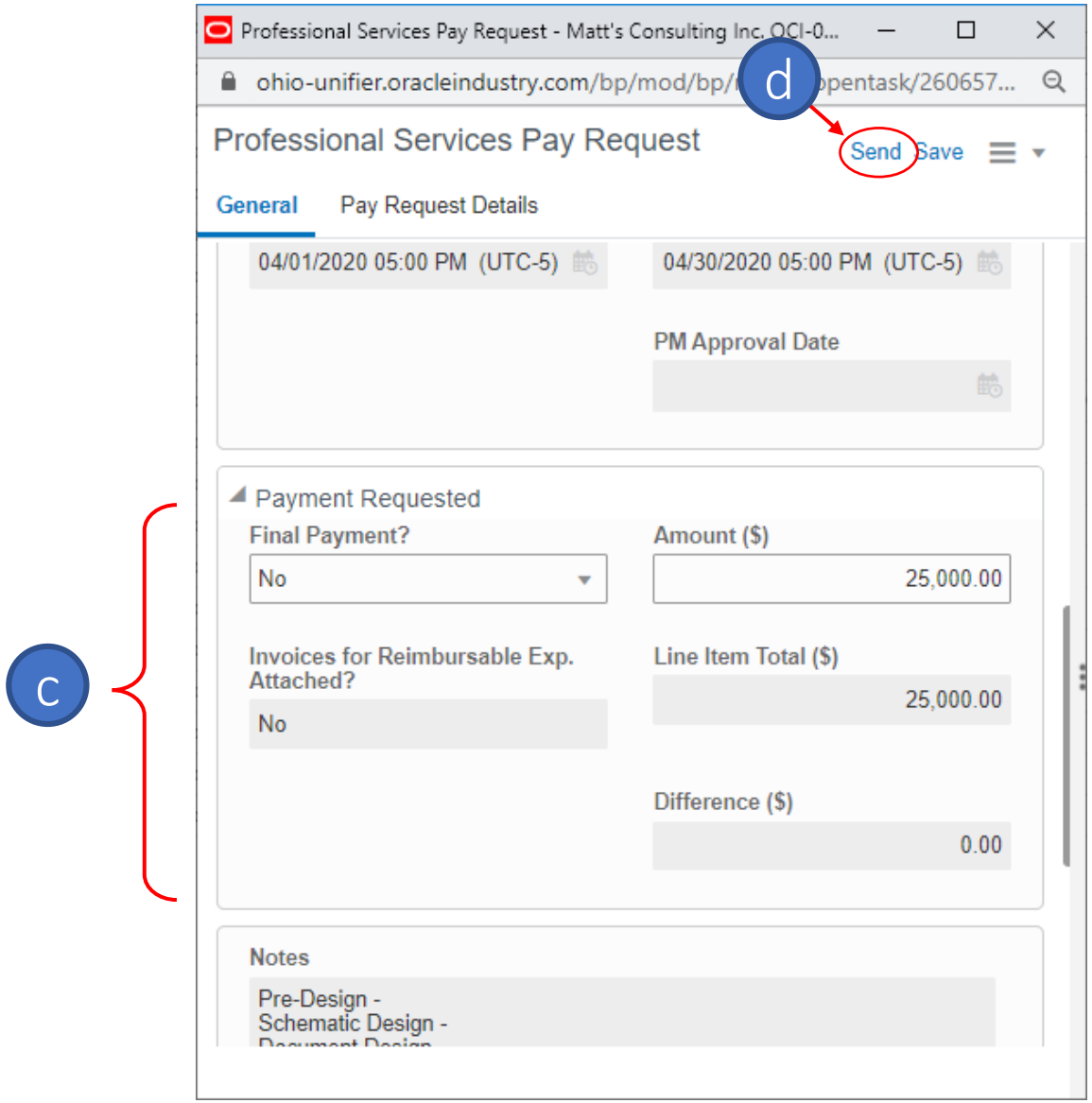
b) Scroll down to the Payment Requested block



PM Approval

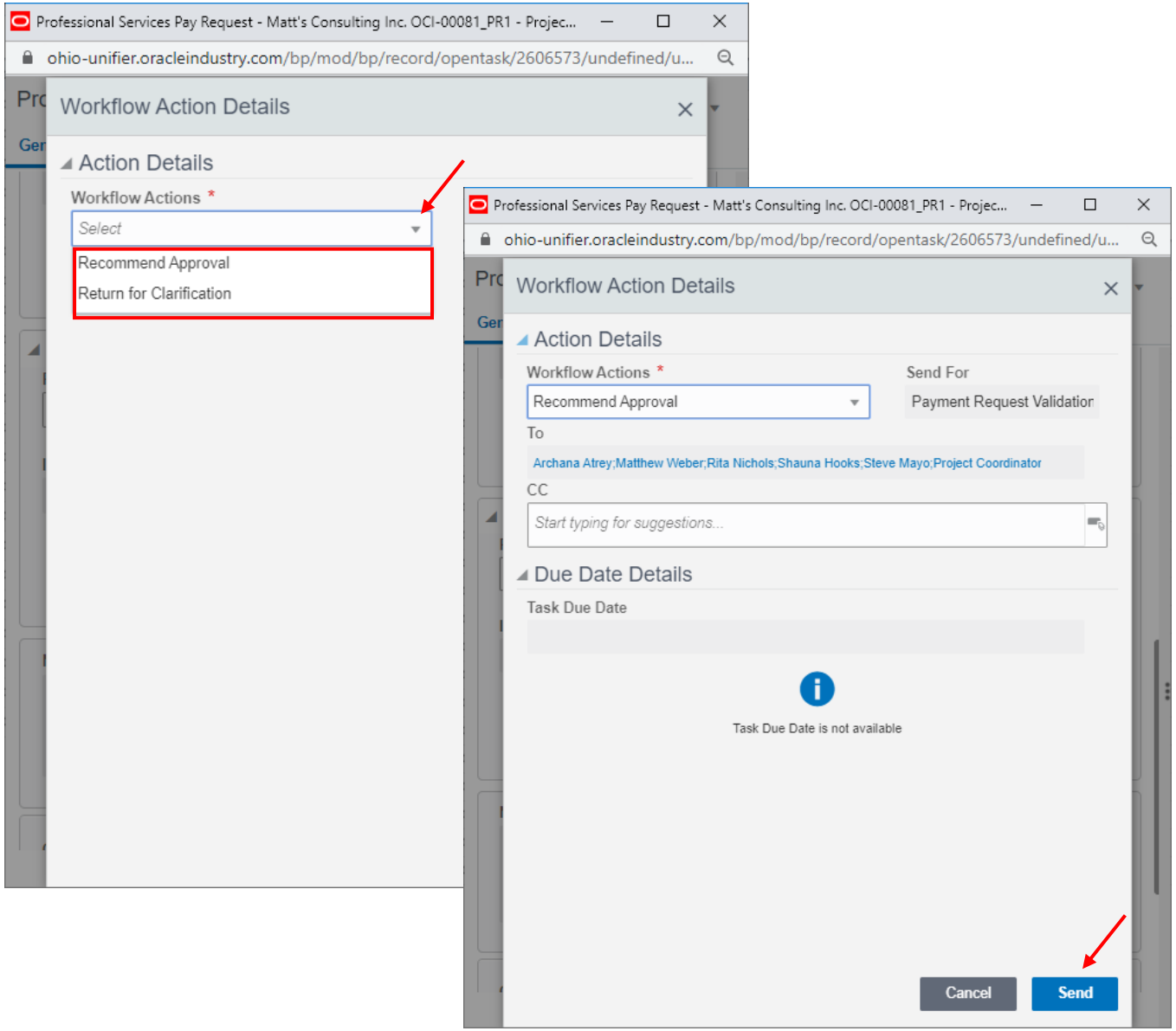
c) Review the pay request to determine if it accurately reflects work completed to date. Review invoice for any reimbursables.

d) When the record is ready to move forward, click the **Send** button



PM Approval

- If the record is ready to move forward to PC Validation:
  - Choose **Recommend Approval**
  - Click **Send**
- If record must be returned to the Associate for Update :
  - Choose **Return for Clarification**
  - Click **Send**



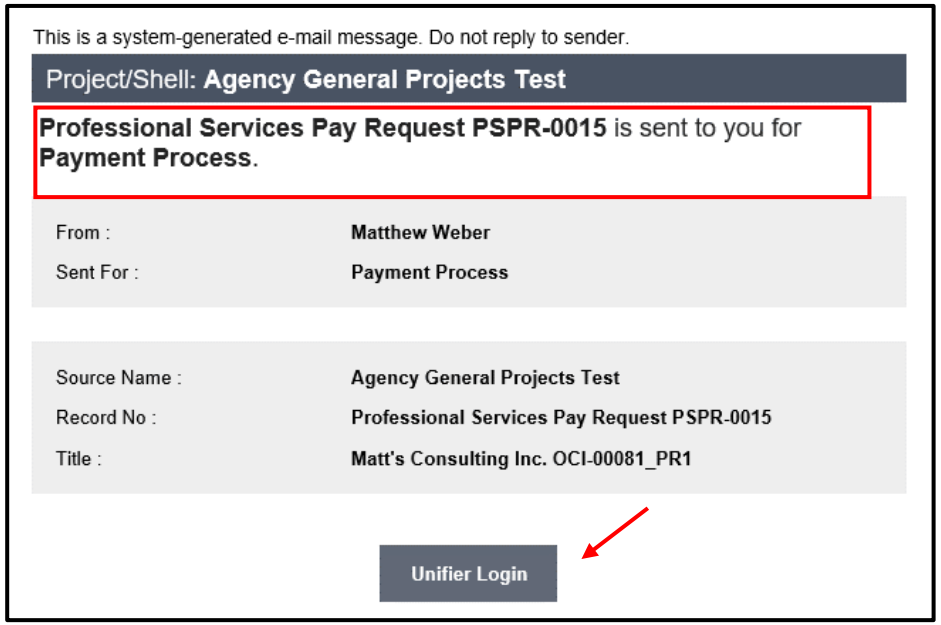
Professional Services Agreement Pay Request Payment Processing (Owner Financial)

Professional Services Agreement Pay Request Payment Processing (Owner Financial)

- As the **Owner Financial** representative you will:
  - **Create the Voucher (check) in your own financial system of record**
  - Record a Voucher Record in OAKS CI
  - Pull the Voucher Record into the Pay Request

Payment Processing (Owner Financial)

- Owner Financial receives an Email
- Click on the “Unifier Login” button to access the task


This is a system-generated e-mail message. Do not reply to sender.

Project/Shell: **Agency General Projects Test**

Professional Services Pay Request PSPR-0015 is sent to you for **Payment Process**.

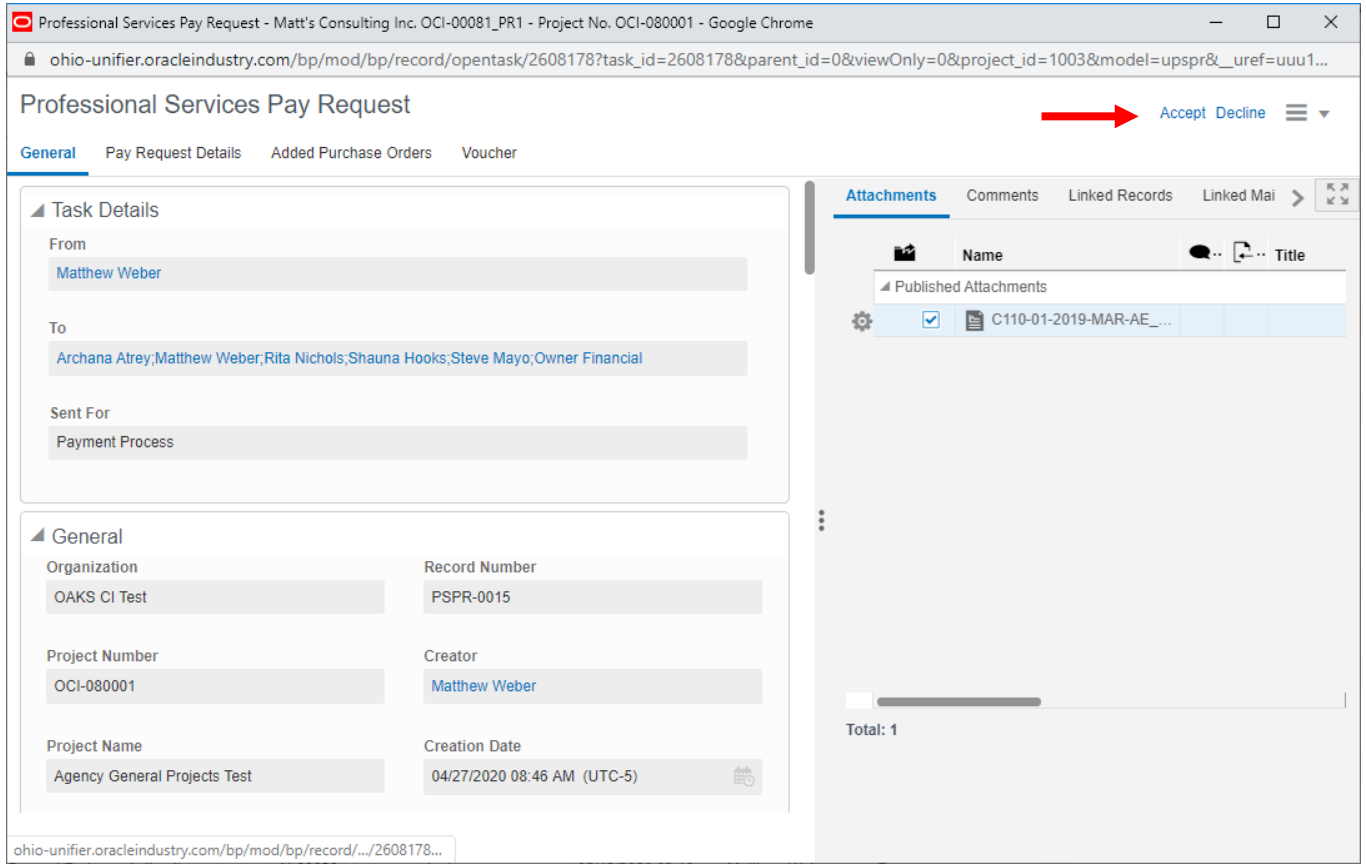
From :	**Matthew Weber**
Sent For :	**Payment Process**

Source Name :	**Agency General Projects Test**
Record No :	**Professional Services Pay Request PSPR-0015**
Title :	**Matt's Consulting Inc. OCI-00081_PR1**

Unifier Login

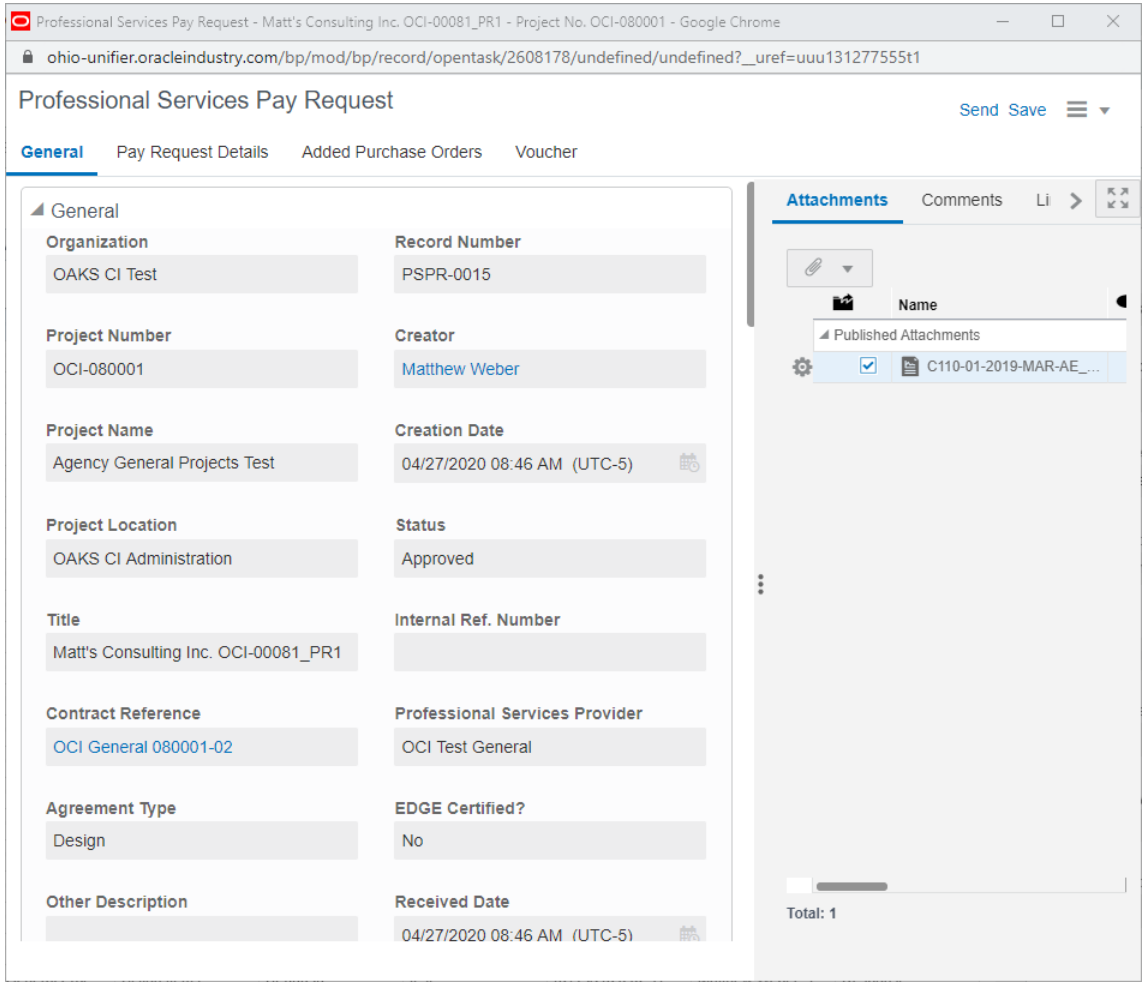
Task Action (Owner Financial)

- Click Accept Task



Payment Processing (Owner Financial)

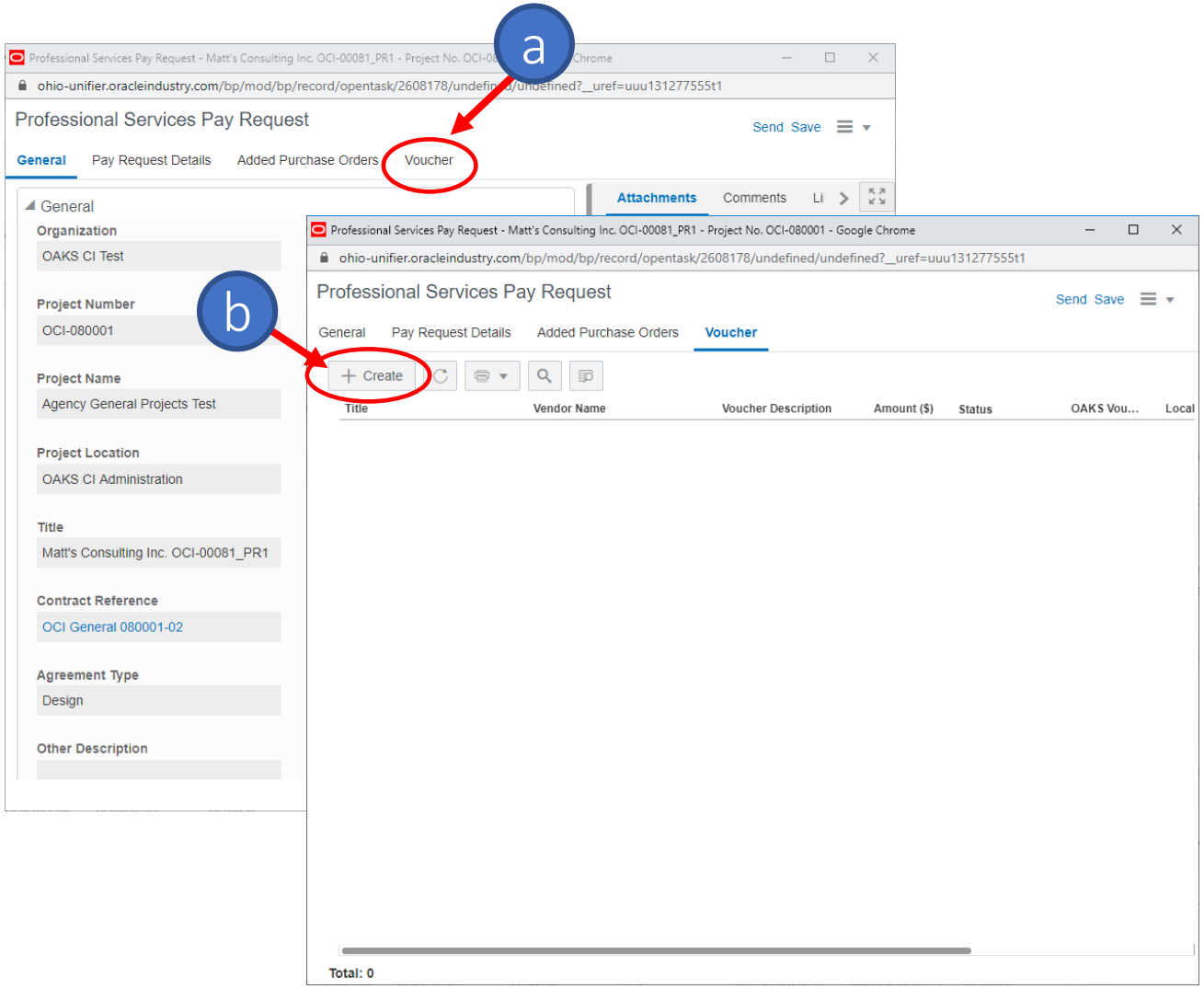
- Review information in the General tab



Payment Processing – Create Voucher (Owner Financial)

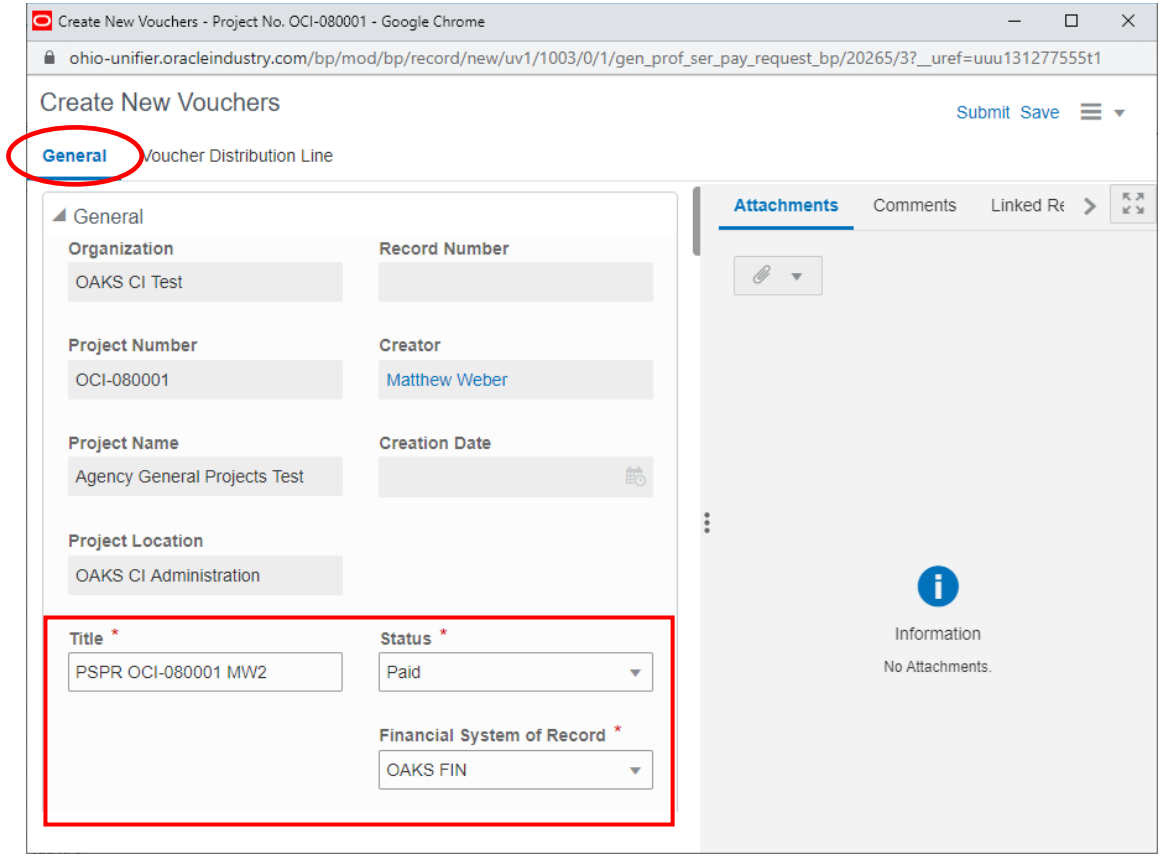
a) Open the Voucher tab

b) Click Create



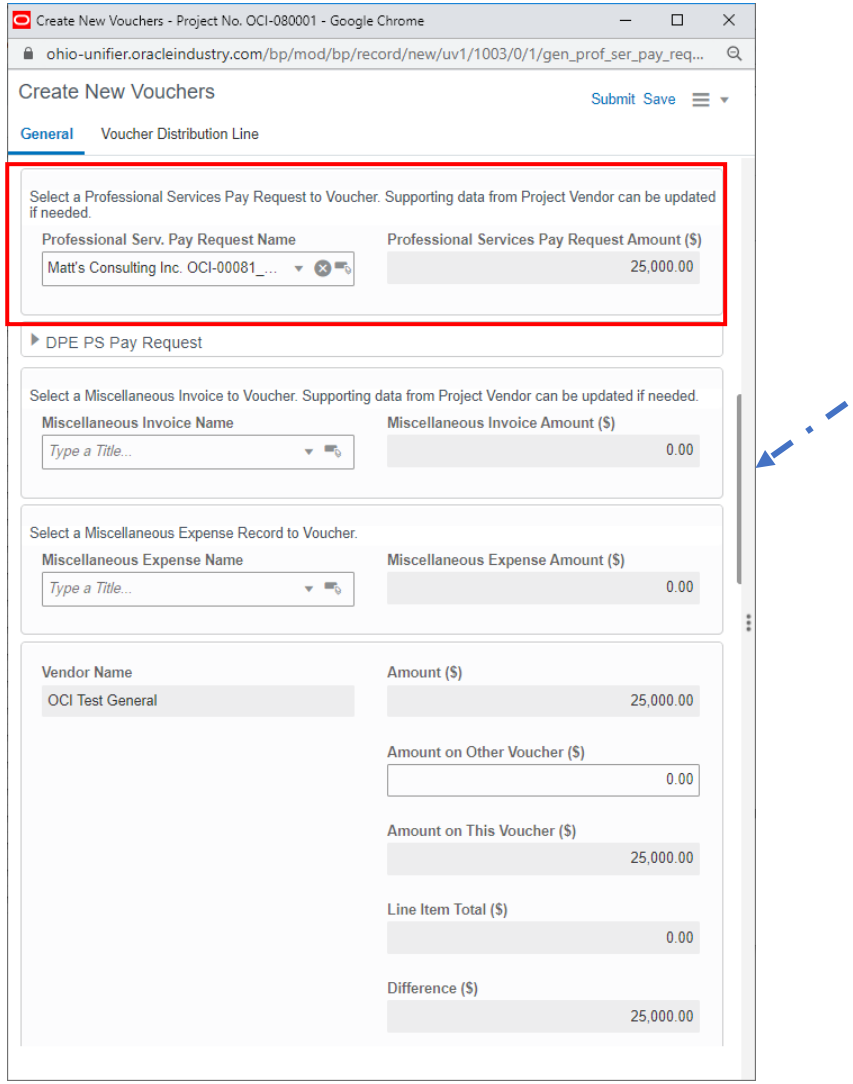
Payment Processing (Owner Financial) Record Voucher

- Under the General tab:
  - Title the Record
  - Set the Record Status to: **Paid**
  - Choose Financial System of Record



Payment Processing (Owner Financial)

- Scroll down the General tab using the slider
- Pay request details should be populated



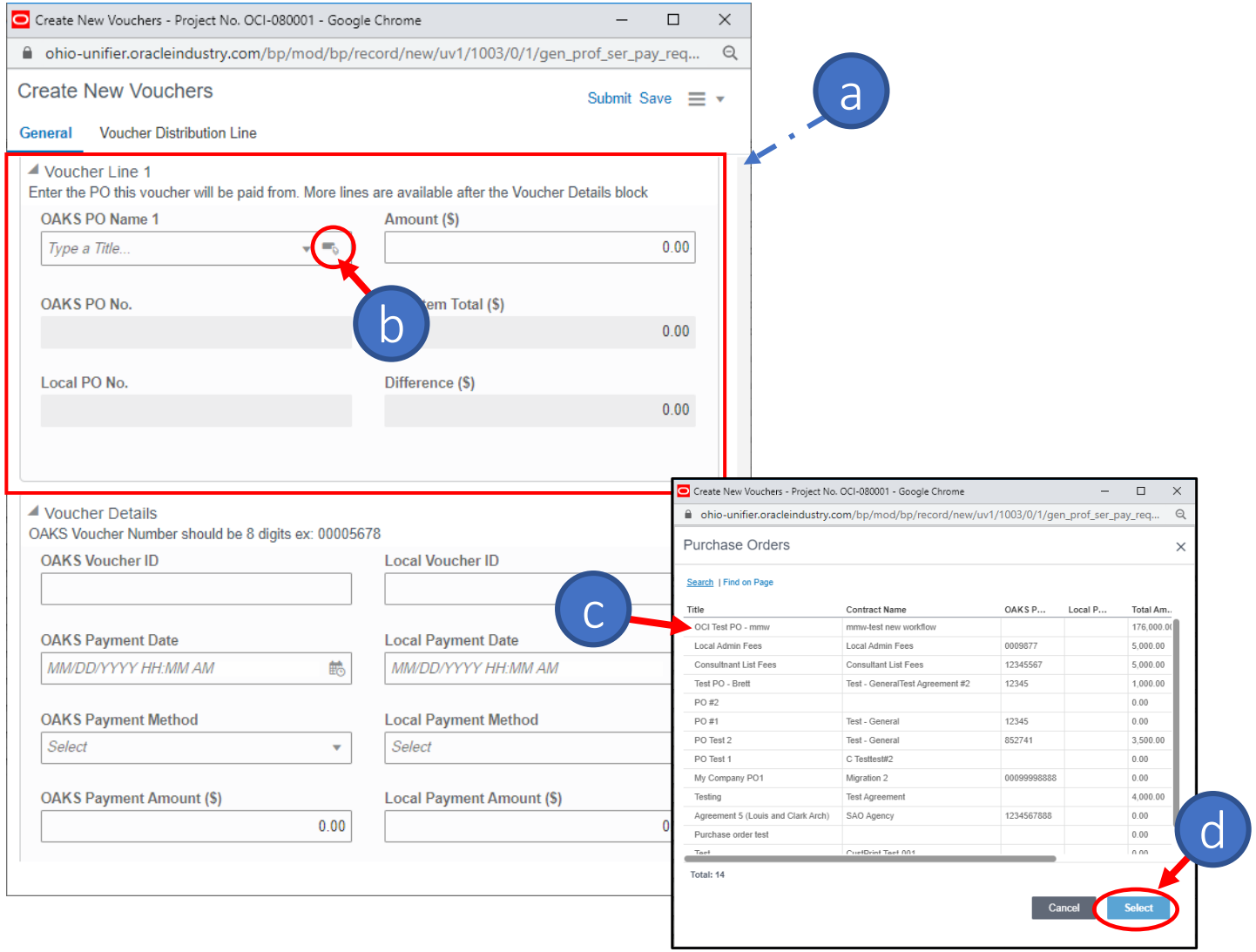
Payment Processing (Owner Financial)

a) Scroll down to Voucher Line 1

b) Click the button to choose **OAKS PO Name**

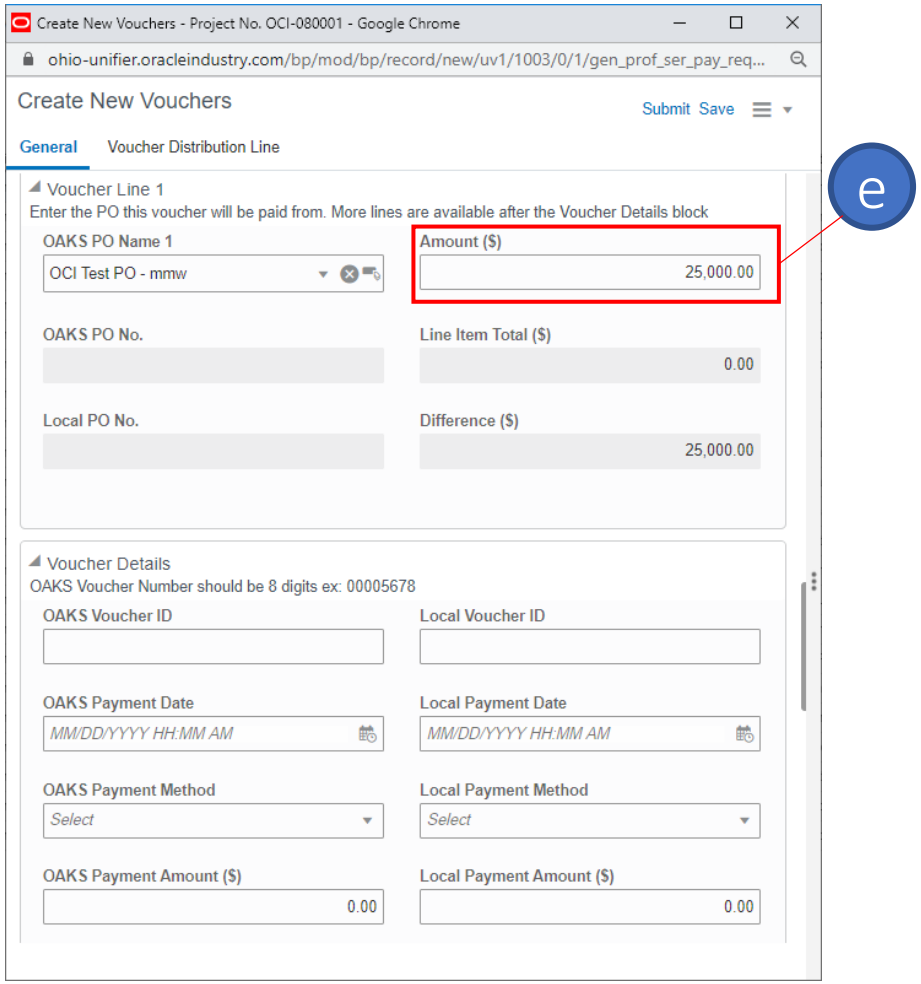
c) Highlight appropriate PO

d) Click **Select**



Payment Processing (Owner Financial)

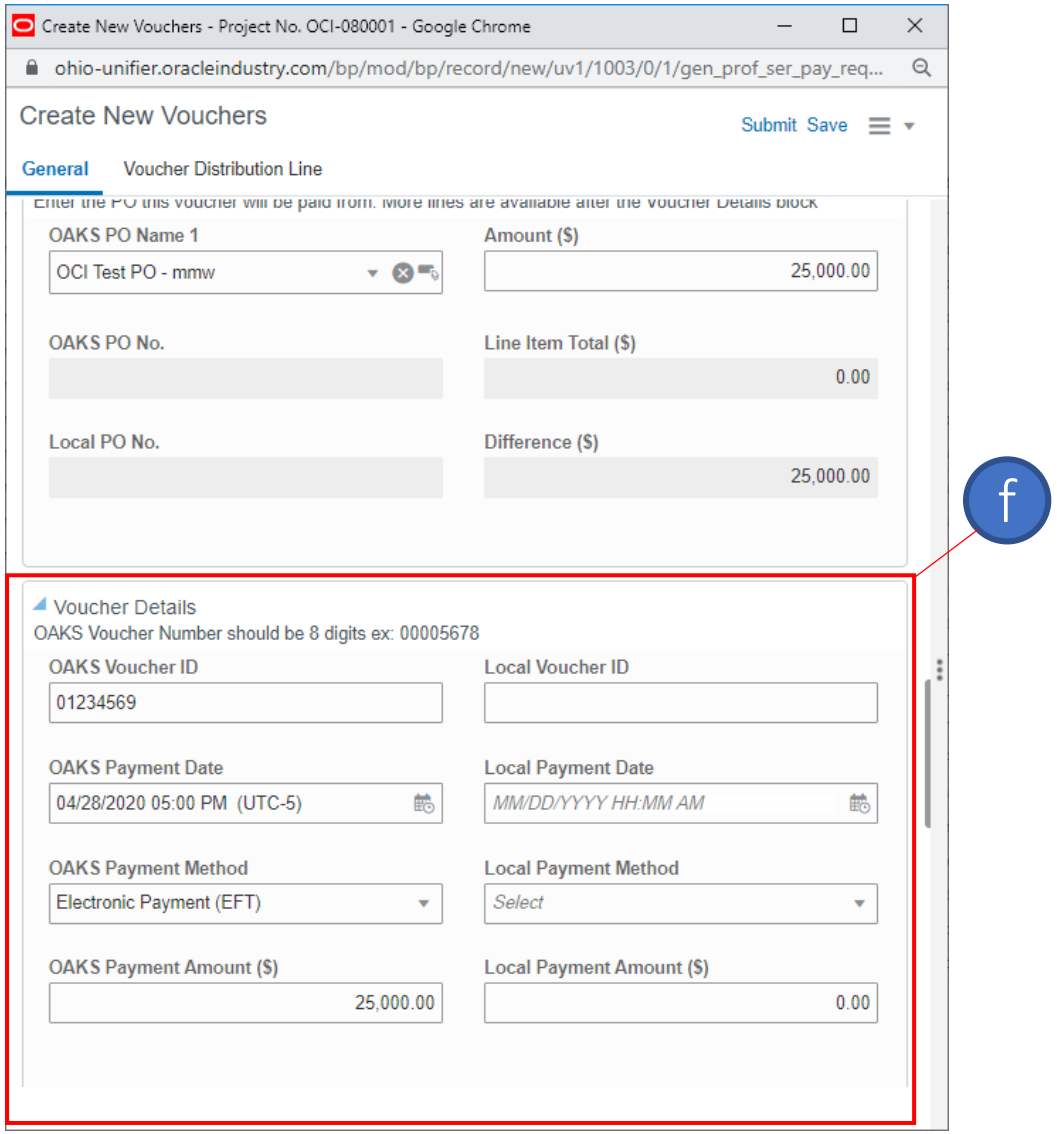
e) Enter PO Amount



Payment Processing (Owner Financial)

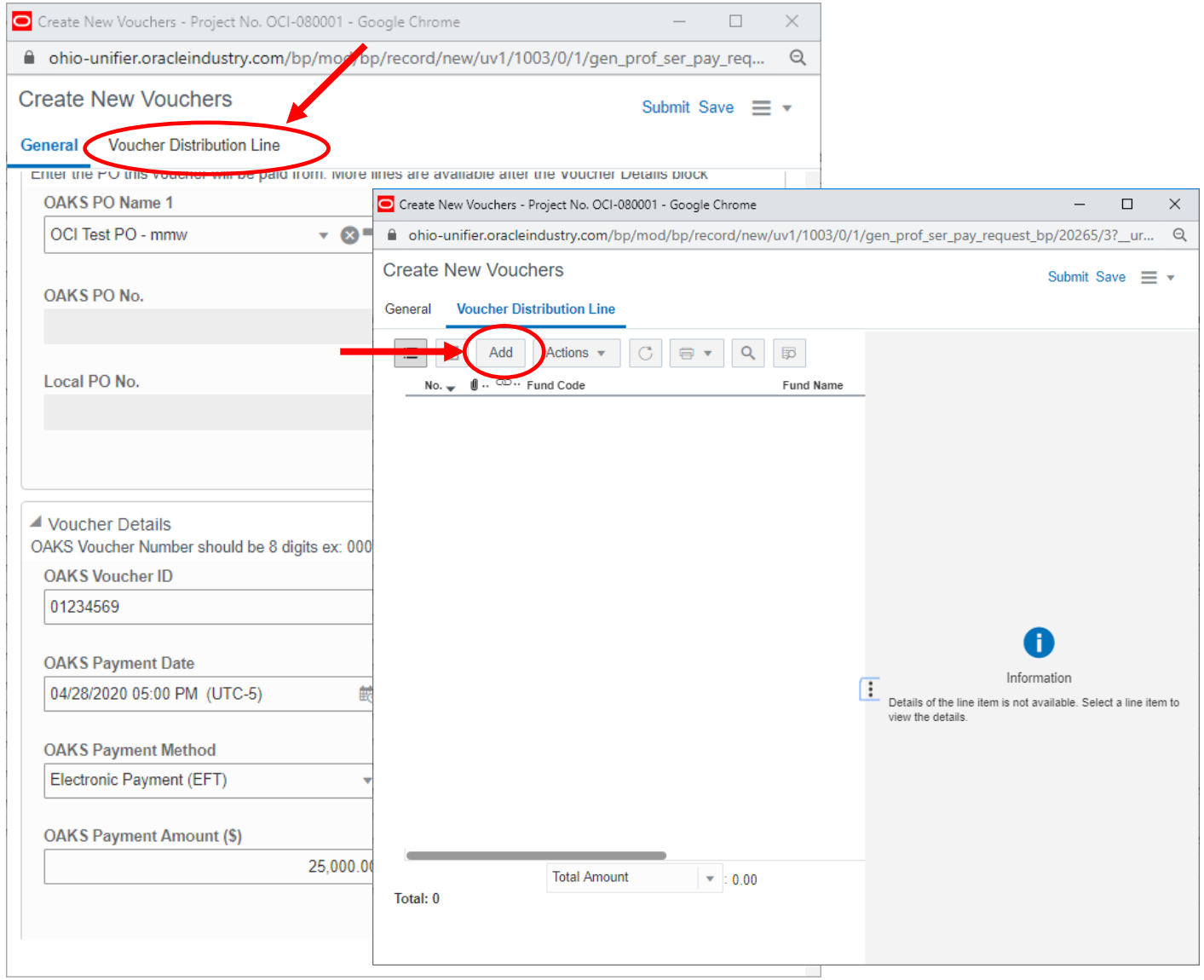
f) In the Voucher Details Section Enter:

- Voucher ID number (Check #)
- Payment Date
- Payment Method
- Payment Amount



Payment Processing (Owner Financial)

- Open **Voucher Distribution Lines** tab
- Click **Add**

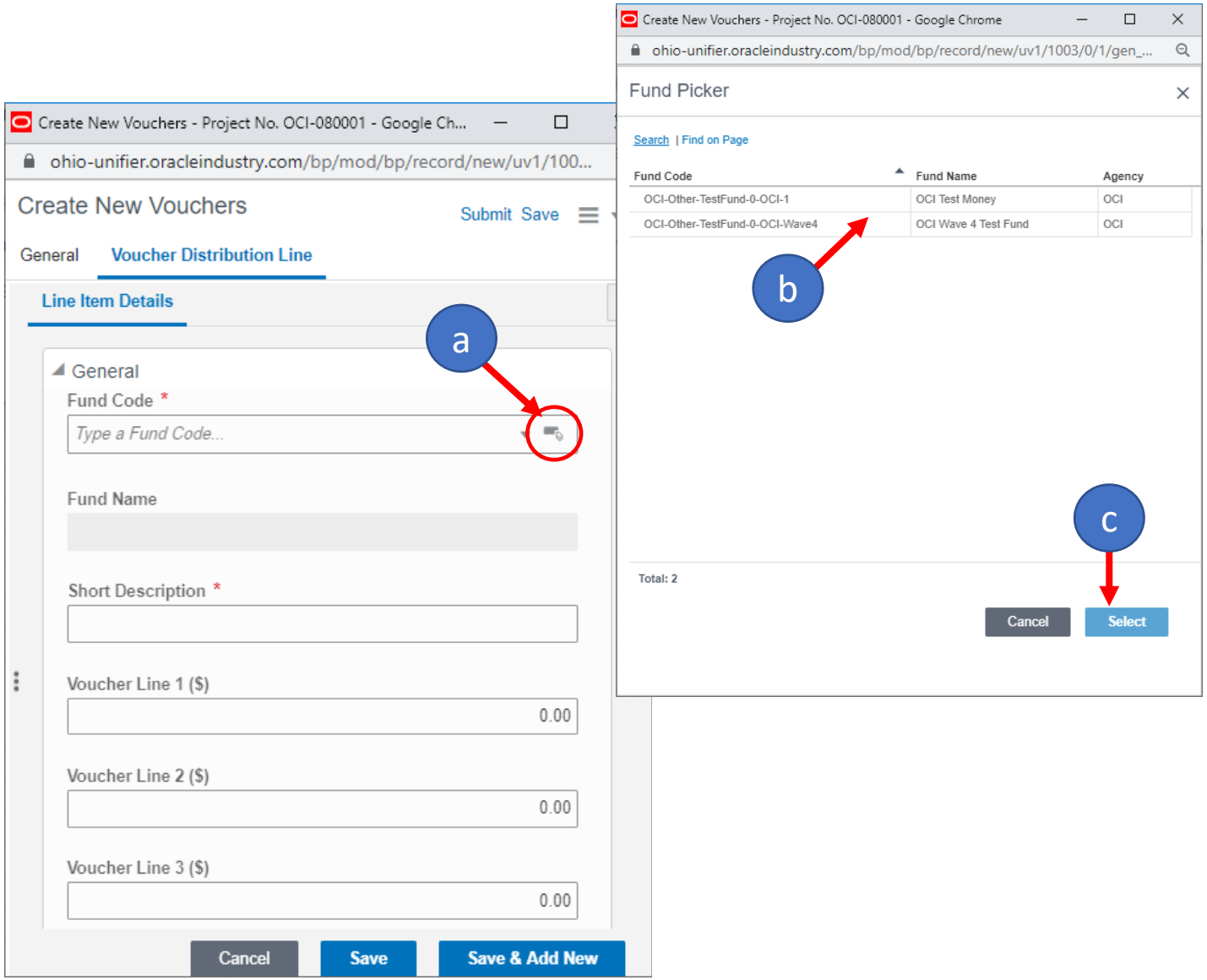


Payment Processing (Owner Financial)

a) Click the button to select a Fund Code

b) Highlight a Fund Code

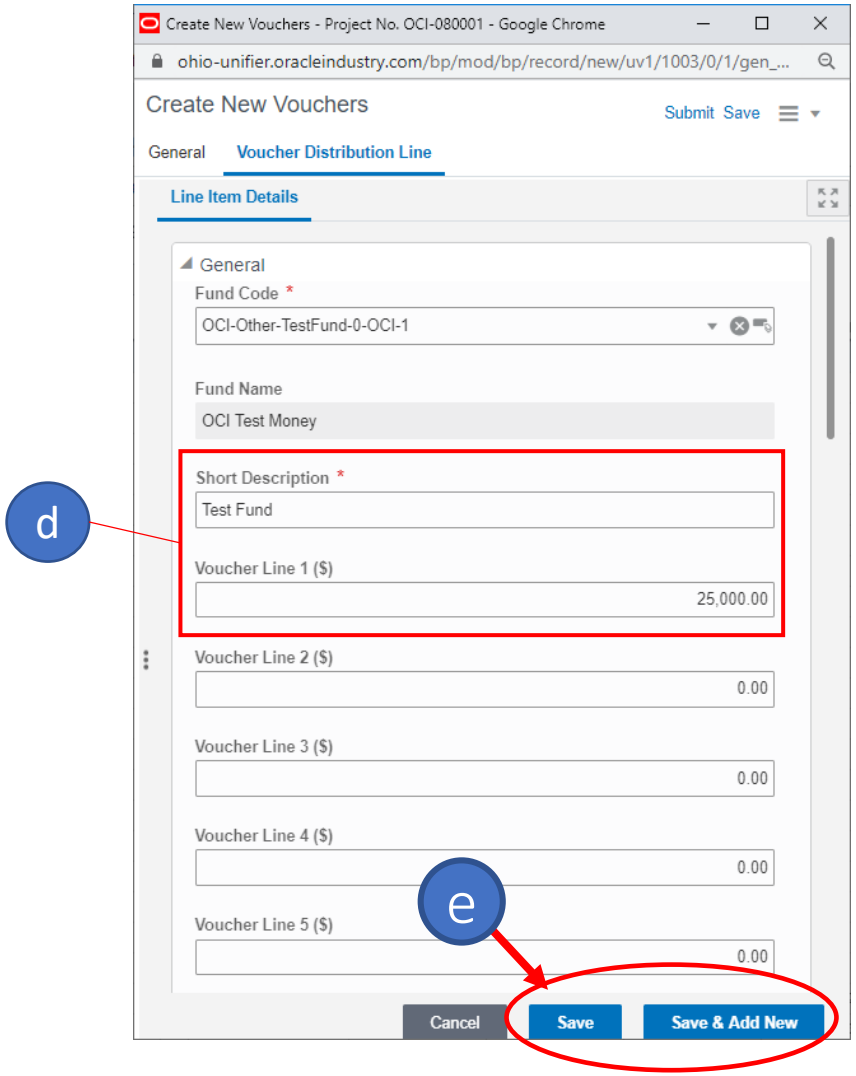
c) Click **Select**



Payment Processing (Owner Financial)

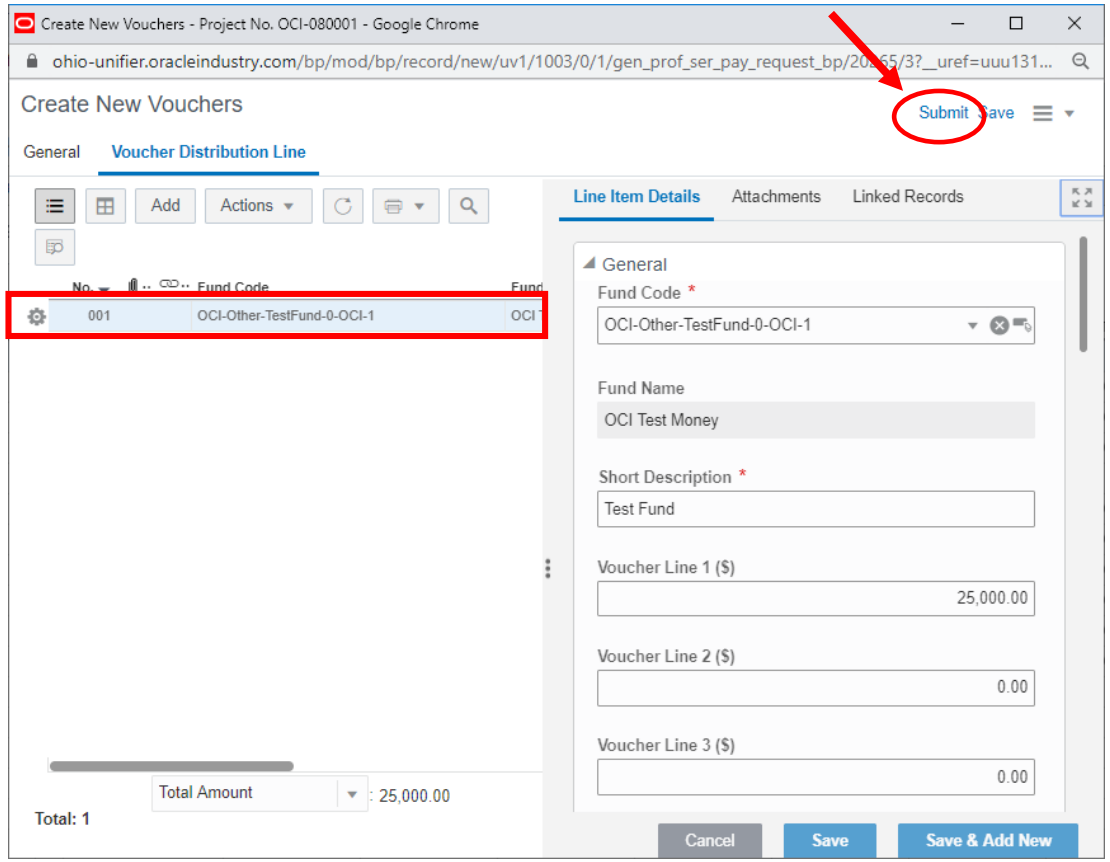
d) Enter Short Description and amount

e) Click **Save** or **Save & Add New** to add additional funding lines



Payment Processing (Owner Financial)

- Your line(s) will show in the Voucher Distribution Lines tab
- Click **Submit** to finish recording the voucher



Payment Processing (Owner Financial)

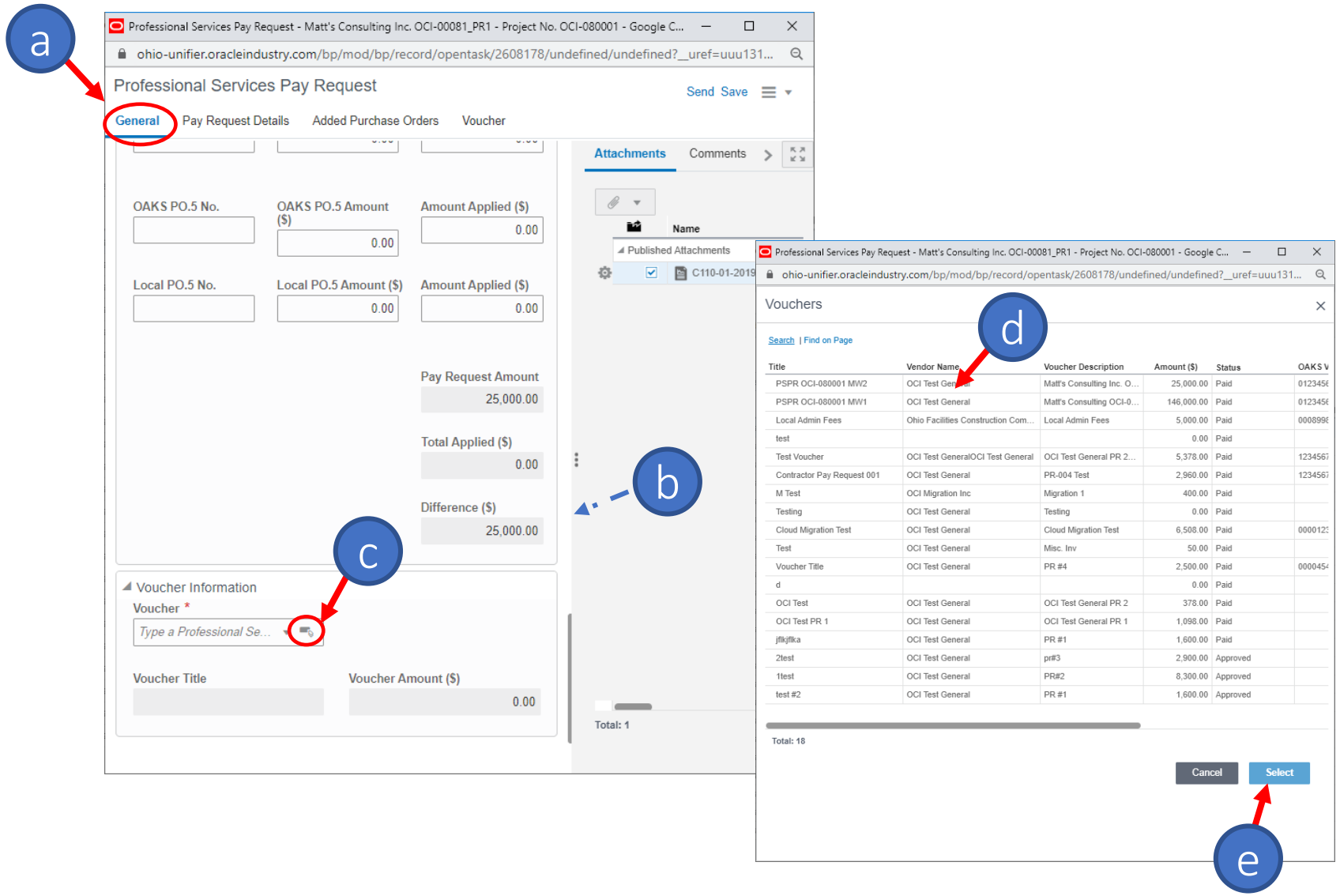
a) Return to the **General** tab

b) Scroll down to the **Voucher Information** section

c) Click the button to select previously recorded **Voucher**

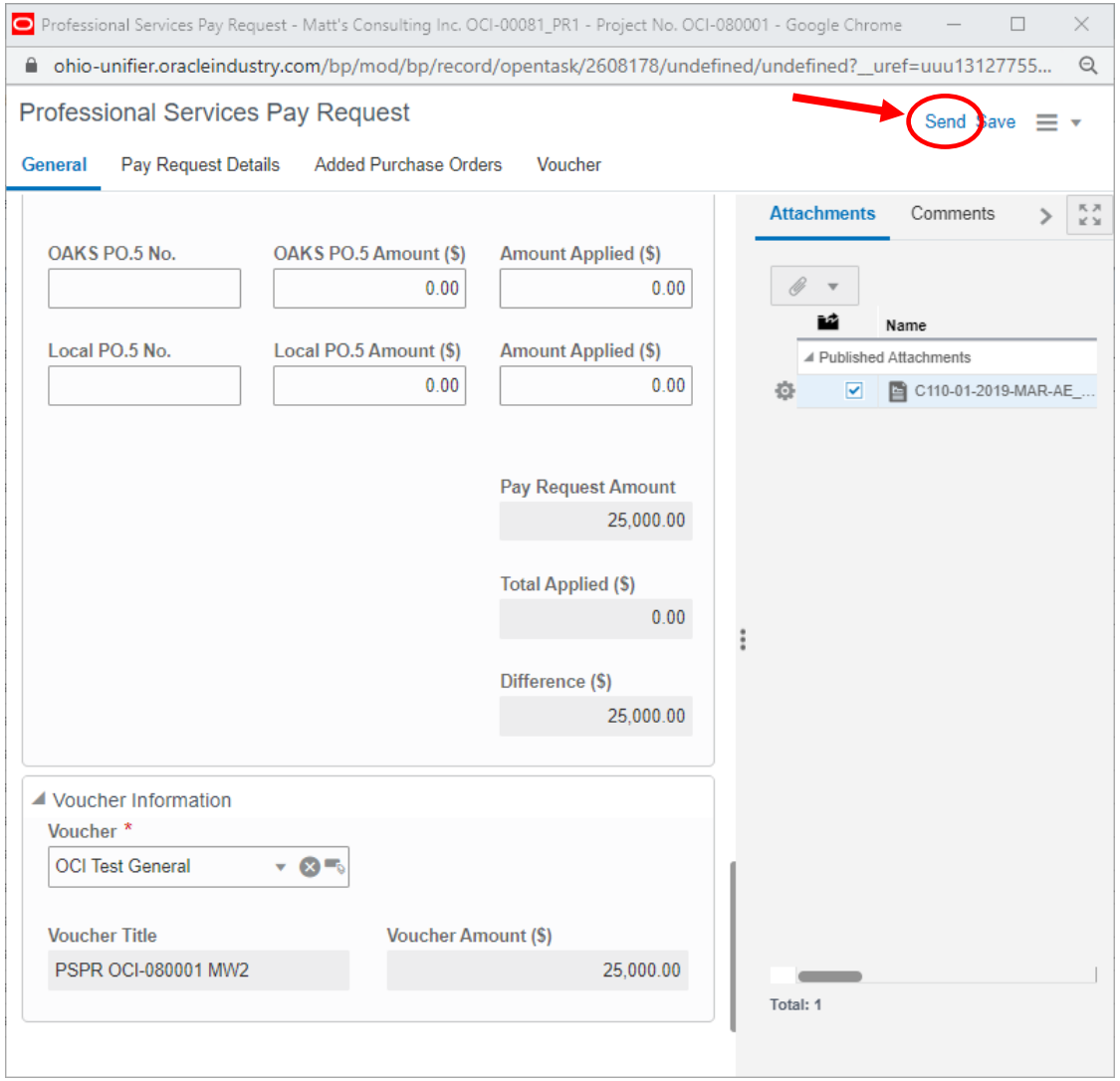
d) Highlight **Voucher**

e) Click **Select**



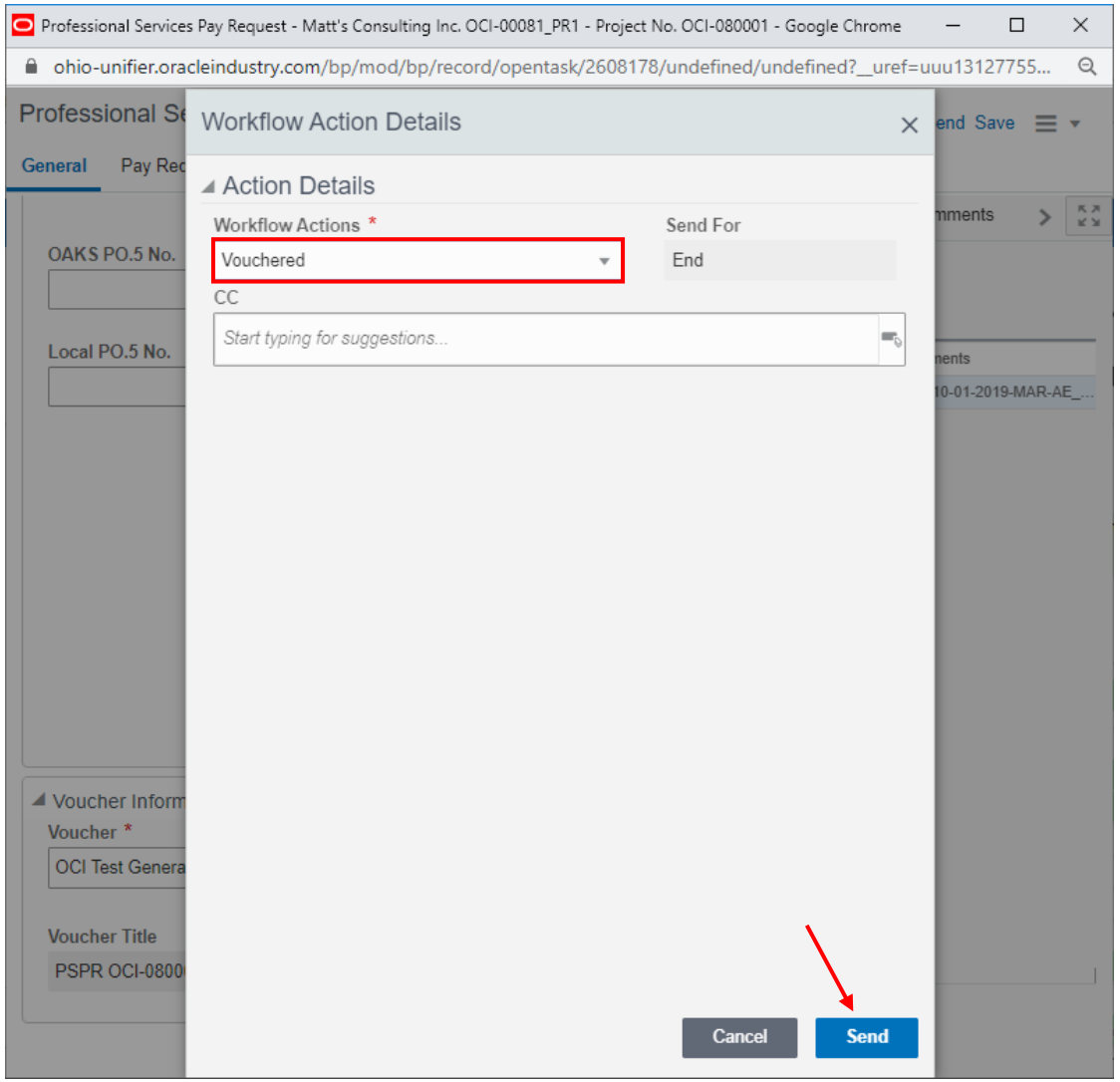
Payment Processing (Owner Financial)

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



Payment Processing (Owner Financial)

- Verify Workflow Action
- Click **Send**
- This will end the Professional Services Pay Request Workflow



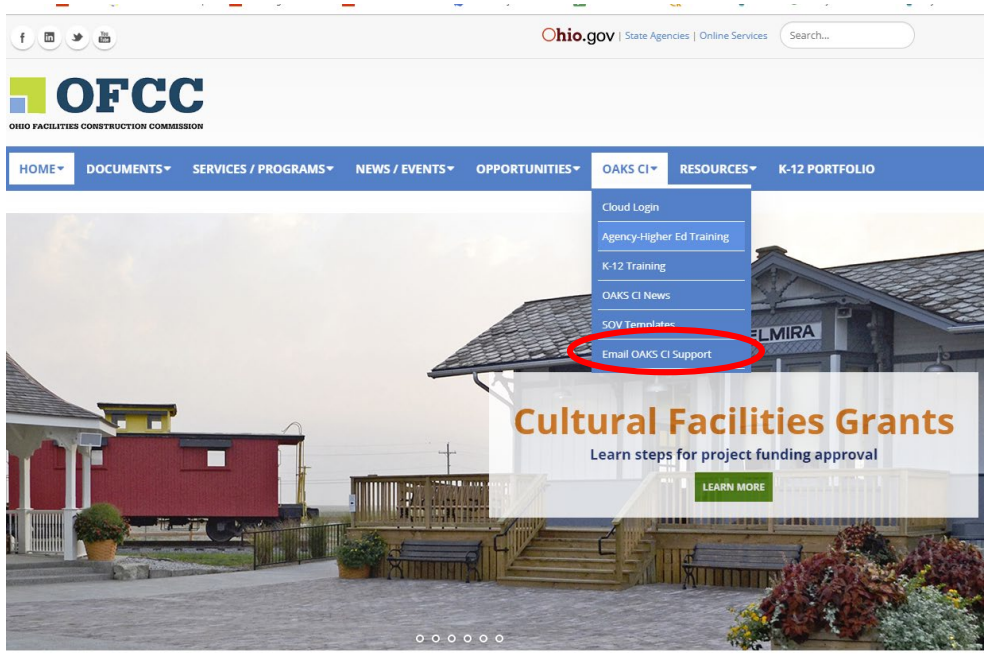
Questions?

Consultant List Assistance:
tasheena.duresky@ofcc.ohio.gov

OAKS CI Assistance:
oaksci@ofcc.ohio.gov or
614-644-2211

Job Aids:
ofcc.ohio.gov (full link below)

- OAKS CI Tab
- Agency/Higher Ed Training
- Local Consultant List Training:
- FAQ's, Training Guides, Consultant List Instructions and Forms, Consultant List Brochure



https://ofcc.ohio.gov/OAKS-CI/Agency-Higher-Ed-Training/Locally-Administered-Consultant-List