



# Professional Services Amendment Create



# Notes on Amendments

- ▶ Revisions to the scope of work of a Professional Services Provider requires written authorization from the Contracting Authority
- ▶ Adjustments in Basic Services Fees, Additional Services, or Reimbursable Expenses resulting from changes in scope of work or additional time must be processed and approved by the Contracting Authority with revisions in funding certified by the Owner



# Purpose & Procedure

- ▶ The PS Amendment Business Process (BP):
  - ▶ Provides for the submission, review, and approval of amendments to the Professional Services Agreement
  - ▶ Provides the Amendment document and other necessary communication using custom prints
  - ▶ Allows the addition of new line items or modification of line item through use of the Reference selection
- ▶ Once the approval process has been completed, which includes funding, a “Notice to Commence Services” will be sent to the Professional Services Provider authorizing work to begin



# **Create a Professional Services Amendment (A/E)**



# Create a Professional Services Amendment (A/E)

## ▶ Log into OAKS CI

a. Click + sign

b. Type project name or number

c. Click appropriate project to open

The screenshot displays the OAKS CI web application interface. At the top, there is a navigation bar with tabs for 'School Facilities', 'Organization Te...', 'OAKS CI Admin', 'Test V2', '2.0 Test', and 'OAKS CI Traini...'. A red box labeled 'a' highlights a '+' sign in the top right corner. Below the navigation bar, there is a search bar labeled 'Search by Name or Number...'. A dropdown menu is open, showing a list of recent locations and bookmarks. A red arrow labeled 'b' points to the search bar, and another red arrow labeled 'c' points to the 'OAKS CI Training 1' entry in the dropdown menu. The main content area features a table with columns for 'Professional Services Provider', 'Agreement Type', and 'Total Agreement Amo...'. The table lists various providers and their agreement types and amounts. A right-hand panel displays details for the selected project, including 'Project Location', 'Status', 'Title', 'Selection Method', 'Delivery Method', and 'Total Project Cost \$'.

Professional Services Provider	Agreement Type	Total Agreement Amo...
Architectural Inc.	Design	\$25,200.00
Architectural Inc.	Design	\$25,200.00
Architectural Inc.	Design	\$25,200.00
mbing	Design	\$1,000.00
mbing	Design	\$0.00
Architectural Inc.	Design	\$15,000.00
Architectural Inc.	Design	\$15,000.00
cker Ltd.	Design	\$325,000.00
cker Ltd.	Design	\$325,000.00
cker Ltd.	Design	\$40,000.00
cker Ltd.	Design	\$40,000.00
mbing	Design	\$10,000.00
cker Ltd.	Design	\$15,000.00
mbing	Design	\$15,000.00

Recent Locations	Bookmarks	Key Locations
OAKS CI Training 1	Training Project - Home	Company Workspace
OAKS CI Admin	Projects (Standard)	Projects
2.0 Test		Agency
Test V2		Higher Ed
OAKS CI Training		School Facilities

Project Location	Status
Surface Road	Approved

Title	Fee Title
Consultant List Agreement 1	SAO Standard Fee 1

Selection Method	Reimbursement Required?
OFCC Architect/Engineer FY 20-21	

Delivery Method	EDGE Waiver
	Yes

Total Project Cost \$	EDGE Goal Percent
\$100,000.00	0.0



# Create a Professional Services Amendment (A/E)

- ▶ In OAKS CI, navigate to:
  - ▶ Logs -> **Professional Services Amendment**
  - ▶ Click **Create**

The screenshot displays the Oracle Primavera Unifier (Development) interface. The top navigation bar shows 'Agency' and 'OAKS CI Trainin...'. A sidebar menu on the left is open, with 'Logs' circled in red. A red arrow points to 'Professional Services Amendments' in the sidebar. The main content area shows the 'Professional Services' section with a '+ Create' button circled in red. Below the button is a table with the following data:

Title
Student 2
Amendment 1
Main
Amendment No. 1
o
Katie's Amendment #
Test Amendment #1

The bottom right corner of the interface shows 'Total: 7'.



# Create Amendment (A/E)

- Fill out the General section (All Items with a red \* are required)
- To enter the Contract Reference, click the button on the right side of the field and highlight the appropriate contract
- Click **Select**
- Scroll down to complete the rest of the General section

General Amendment Details

Organization: OAKS CI Test

Project Number: OCI-080001

Project Name: Agency General Projects Test

Project Location: OAKS CI Administration

Amendment No. \*: 080001-2

Title \*: Amendment 080001-2

Contract Reference \*: OCI General 080001-02

Agreement Type: Design

Other Description:

Selection Method: Competitive Selection

Record Number:

Creator: Matthew Weber

Creation Date:

Status:

Fee Title: OFCC Standard

Professional Services Provider: OCI Test General

EDGE Certified?: No

Amount (\$) \*: 5,000.00

Line Item Total (\$): 0.00

Difference (\$): 5,000.00

Title	Professional Services Provi...	Agreement Type	Total Agreement A...	CA Ho...
OCI General 080001-02	OCI Test General	Design	176,000.00	
Test UI - mmw 3	OCI Test General	Design	146,000.00	
mmw-test new workflow	OCI Test General	Design	176,000.00	
mmw-Test Agreement	OCI Test General	Design	8,000,000.00	
Test Agreement	Zenith Systems, LLC	Design	1,000.00	
Agreement #3	Fanning/Howey Associations, Inc.	Design	32,500.00	
Migration 2	OCI Migration Inc	Design	1,100.00	
Angie's Test	OCI Test General	SAO/Agency	0.00	
test#2	OCI Test General	Design	12,000.00	
Agreement w internal a/e	OCI Test General	Design	55,000.00	
Test Agreement	OCI Test General	Design	15,000.00	
Test Agreement	OCI Test General	Design	12,000.00	

Total: 12

Cancel Select



# Create Amendment (A/E)

- e) Complete Summary, Why, and What sections in the General section OR add attachments containing these details
- f) Click the **Amendment Details** tab

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

ohio-unifier.oracleindustry.com/mod/bp/record/new/upsa2/1003/266?\_\_uref=uuu131277555t1

Create New Professional Services Amendments Send Save

**General** Amendment Details

**Attachments** C >

Summary of Additional Services/Reimbursables  
Summary

Explain WHY Agreement is being Amended  
Why

What is the EFFECT of the Amendment on the Project  
What

Notes

Information  
No Attachments.



# Create Amendment (A/E)

- a) To add Line Items click **Add**
- b) If you are referencing a current line in your agreement click the select button next to Reference
- c) Highlight a Line Item and click **Select**
- d) Fill out the Amount field
- e) Click **Save & Add New** to add another line, otherwise click **Save**

The screenshot displays the 'Create New Professional Services Amendments' form. The 'Amendment Details' tab is active, showing a table with columns for 'No.', 'Refer...', 'WBS Code', and 'Code Name'. The 'Add' button is circled in red and labeled 'a'. The 'Line Item Details' tab is also visible, showing fields for 'Reference' (value: 2), 'WBS Code' (value: AE-AS-TI), 'Code Name' (value: AE Tests and Inspections), 'Short Description' (value: Tests and Inspections), 'Professional Services EDGE Certified?' (value: No), and 'Amount (\$)' (value: 5,000.00). The 'Amount (\$)' field is circled in red and labeled 'd'. The 'Commit Line Item Picker' dialog is open, showing a table with columns for 'Item #', 'Ref', 'Description', and 'CBS Code'. The table contains four rows, with the second row (Item # 000020, Ref 2, Description 'Tests and Inspections', CBS Code 'AE-AS-TI') highlighted in blue and labeled 'c'. The 'Select' button in the dialog is labeled 'b'. The 'Save & Add New' button at the bottom of the form is labeled 'e'. The 'Total Amount' field at the bottom left shows 'Total: 0'.



# Create Amendment (A/E)

- a) If you are creating a new Line Item, click the button next to WBS Code
- b) Click the **Collapse** button
- c) Choose CBS code and click **Select**
- d) Fill out required fields marked with a red \*
- e) Click **Save & Add New** to add another line, otherwise click **Save**

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

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/upsa2/1003/266?\_uref=uuu13127755t1

Create New Professional Services Amendments Send Save

General **Amendment Details**

Add Actions

No.	Refer...	WBS Code	Code

**Line Item Details**

**General**

Reference  
Type a Reference No...

WBS Code \*  
AE-AS-TI

Code Name  
AE Tests and Inspections

Short Description \*  
Inspection

Professional Services EDGE Certified?  
No

Amount (\$) \*  
5,000.00

Subcontractor/Supplier  
Type a Subcontractor/Supplier...

EDGE Certified?

Total Amount: 0.00  
Total: 0

Cancel Save **Save & Add New**

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

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/upsa2/1003/266?\_uref=uuu13127755t1

CBS Picker

Search

CBS Code	CBS Name
AE-AS-EN	AE Environmental Survey
AE-AS-GT	AE Geotechnical Investigation
AE-AS-HM	AE Hazardous Materials Survey
AE-AS-LD	AE LEED Documentation Services
AE-AS-MV	AE Measurement and Verification
AE-AS-OT	AE Other Additional Services
AE-AS-PF	AE Partnering Facilitation
AE-AS-PR	AE Program of Requirements
AE-AS-SU	AE Site Surveying Services
<b>AE-AS-TI</b>	<b>AE Tests and Inspections</b>
AE-AS-WS	AE Warranty Services
AE-RE-00	AE Reimbursable Expense
RF-00-00	Regulatory Fees Summary

Total: 343

Cancel **Select**



# Create Amendment (A/E)

- f) Saved Line Items will display
- g) When all lines have been added, note the **Total Amount**
- h) Click the General tab

h

General Amendment Details

Add Actions Refresh Print Search Help

No.	Refer...	WBS Code	Code Name
001	2	AE-AS-TI	AE Tests and Inspections

Total: 1

Total Amount : 5,000.00

Line Item Details Attachments Linked Records

General

Reference  
2

WBS Code \*  
AE-AS-TI

Code Name  
AE Tests and Inspections

Short Description \*  
Tests and Inspections

Cancel Save



# Create Amendment (A/E)

- i) In the General section, the **Line Item Total (\$)** field will be updated. Ensure that this number is equal to the **Amount (\$)** field, and the **Difference (\$)** field equals \$0.00
  
- j) 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/new/upsa2/1003/266?__uref=uuu13127755t1`. The page title is "Create New Professional Services Amendments". The "Send Save" button is circled in red. The form is divided into "General" and "Amendment Details" sections. The "General" section contains the following fields:

Project Number	OCI-080001	Creator	Matthew Weber
Project Name	Agency General Projects Test	Creation Date	
Project Location	OAKS CI Administration	Status	
Amendment No. *	080001-2	Fee Title	OFCC Standard Fee
Title *	Amendment 080001-2	Amendment Execution Date	
Contract Reference *	OCI General 080001-02	Professional Services Provider	OCI Test General
Agreement Type	Design	EDGE Certified?	No
Other Description		Amount (\$) *	5,000.00
Selection Method	Competitive Selection	Line Item Total (\$)	5,000.00
		Difference (\$)	0.00

The "Amount (\$)", "Line Item Total (\$)", and "Difference (\$)" fields are highlighted with a red box. An information icon is located in the bottom right corner of the form area.



# Create Amendment (A/E)

- ▶ Verify Workflow Action
- ▶ Click **Send**
- ▶ The record will move forward to PM for Amendment Proposal Review

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

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/upsa2/1003/266?\_\_uref=uuu13127755t1#

Create New Professional Services Amendments

General

Workflow Action Details

Action Details

Workflow Actions \*  
Submit Amendment Proposal

Send For  
Amendment Proposal Review

To  
Archana Atrey; Matthew Weber; Rita Nichols; Shauna Hooks; Steve Mayo; Project Manager

CC  
Start typing for suggestions...

Due Date Details

Task Due Date  
Task Due Date is not available

Cancel Send

# Questions?

Please contact OAKS CI Support Desk:

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

614.644.2211

