![Kent State University logo]

OFFICE OF THE UNIVERSITY ARCHITECT

<u>PROFESSIONAL SERVICES AMENDMENT PROCEDURE IN OAKSCI</u>

The documentation required for an amendment is done outside of OAKSCI and when this is complete, the Contracts Administrator will notify the Associate that they will be able to enter their amendment in OAKSCI.

Step One: Get in your project and click on Logs – Professional Services Amendments. Click on New.

Step Two: Click on the word "General" to make this section larger.

> ➢ Put in the Amendment Number (should be noted on your amendment that was signed outside of OAKSCI).
> ➢ At Contract Reference, click on the Select button and click on the original Associate contract.
> ➢ Put in the dollar amount of the amendment.
> ➢ You can put a small description into the Summary of Additional Services/Reimbursables box, but it is not necessary.

Step Three: Click on the words "Amendment Details" to make this section larger.

➢ Click on the Add button. A new box will appear.

- ➢ If you are adding monies to the original agreement, SKIP the Reference line and go straight to the WBS code line and hit that line.
- ➢ A new box will appear.

			WBS Name
1	⊞ PA-00-00		Property Acquisition Summary
12	⊞ RM-00-00		Relocation and Moving Summary
17	⊞ LE-00-00		Legal Expense Summary
24	⊞ OR-00-00		Owner Expense Summary
56	⊟ AE-00-00		Professional Design Summary
57	⊞ AE-AE-00		Professional Design General
59	⊞ AE-BS-00		AE Basic Services
69	⊞ AE-AS-00		AE Additional Services
85	⊞ AE-RE-00		AE Reimbursable Expense
89	⊞ RF-00-00		Regulatory Fees Summary
98	⊞ CM-00-00		Construction Management Summary
141	⊞ DB-00-00		Design Build Summary
167	⊞ CE-00-00		Construction Execution Summary
255	⊞ Cx-00-00		Commissioning Summary
277	⊞ FE-00-00		F F and E Summary
288	⊞ AA-00-00		Acquisition of Art Summary
292	⊞ PM-00-00		Project Management Summary
315	⊞ ES-00-00		Energy Services Summary
354	⊞ ID-00-00		Interior Design Summary

Toolbar: ☞ Select ⊞ Expand ⊟ Collapse 🔍 Find ☒ Close Window
Select WBS Code

Callout: Once you highlight a WBS Code, click the Select button.
Callout: Click on the collapse button to make this screen easier to navigate.
Callout: These will be the WBS Codes that you will choose from. Click on the "plus" sign to get more options.

- ➢ Click on the Collapse button and then find the WBS Code needed. Highlight it, and click the Select button.
- ➢ Once you select a line, it will bring you back to the Professional Services Amendment Line Item box. Add a short description and put in the dollar amount.
- ➢ If any of this work is being done by an EDGE subcontractor, click on the Select button next to Subcontractor/Supplier and add the EDGE component.
- ➢ Click on the OK button.
- ➢ Continue to add lines until the amendment is complete.

NOTE: If you are using an EDGE Subcontractor, you MUST use WBS Code AE-AS-BC.

- ➢ If monies are being taken off any part of the amendment, click on the Reference line and highlight and select the existing line and put in the negative dollar amount on the Amount line.
- ➢ Again, if there is a Subcontractor associated with the negative line make sure to add them on the Subcontractor/Supplier line.

Step Four: Click on the words "Action Details" to make this section larger.

- ➢ Workflow Actions is Submit Amendment Proposal, then hit Send.
- ➢ The Amendment will be sent to the Project Manager for review.
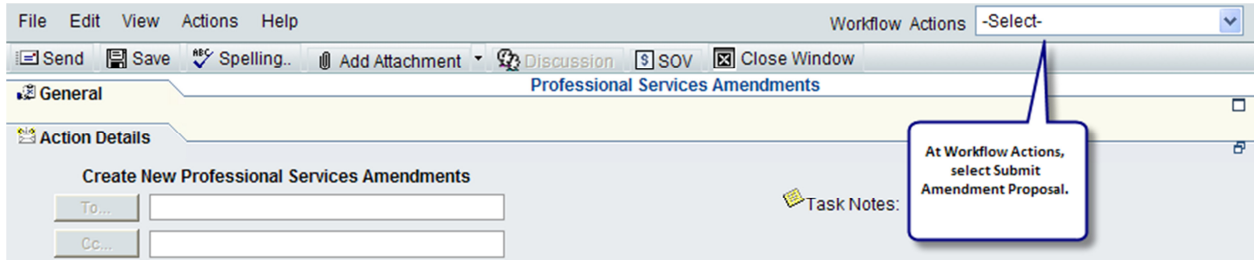
Step Five: The Project Manager will Accept the task.

- ➢ They will review the amendment to be sure that all information and the dollar amount are correct.
- ➢ If everything is correct, Workflow Actions is Prepare Amendment and then hit Send.

Step Six: The Contracts Administrator will Accept the task.

- ➢ They will review the amendment to be sure all of the information and the dollar amount are correct.
- ➢ They will attach all of the documentation associated with the amendment (signed agreements, correspondence, etc.)
- ➢ Workflow Actions is Create Documents, then hit Send.

Step Seven: The Associate will Accept the task.

- ➢ They will review all of the attached documentation and confirm that all entries were made correctly.
- ➢ Workflow Actions is Send Amendment, then hit Send.

Step Eight: The KSU Accounting System Coordinator (Owner/Financial) will Accept the task.

- ➢ They will confirm all of the WBS Codes are correct (if there is an EDGE subcontractor, that the AE-AS-BC code was selected and the Subcontractor's name is on this line).
- ➢ They will confirm this is the proper dollar amount.
- ➢ They will enter the Purchase Order number, the dollar amount and what funds are being used.
- ➢ Workflow Actions is Accept, then hit Send.

Step Nine: The Director will Accept the task.

- ➢ They will verify that this is the amendment that has been approved and signed by them outside of OAKSCI.

> ➢ Workflow Actions is Approve, then hit Send.

Step Ten: The Contracts Administrator will Accept the task.

> ➢ They will fill in the Amendment Execution Date.
> ➢ Workflow Actions is Distribute, then hit Send.

Step Eleven: The Associate will Accept the task.

> ➢ Workflow Actions is Acknowledge, then hit Send.
> ➢ The Amendment will go to End.
> ➢ The Associate can now see this amendment on their Schedule of Values.