



OFFICE OF THE UNIVERSITY ARCHITECT

PROFESSIONAL SERVICES AMENDMENT PROCEDURE IN OAKSCI

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.

A screenshot of the "Professional Services Amendments" form in the OAKSCI system. The form is titled "General" and contains various input fields. A blue callout box with a pointer indicates that fields marked with a red asterisk (*) must be filled in. The fields include: Organization (Kent State University), Project Number (OCI-090002), Project Name (KSU Projects Test), Project Location (KSU), Amendment No. (*), Title (*), Contract Reference (with a "Select..." button and a red asterisk), Agreement Type, Other Description, Record Number, Creator (KSU Student1), Creation Date, Status, Fee Title, Amendment Execution Date, Professional Services Provider, EDGE Certified Sub?, Amount (\$) (*), Line Item Total (\$) (0.00), and Difference (\$) (0.00). At the bottom, there is a "Summary of Additional Services/Reimbursables" section with a "Summary:" label and a text area.

- 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.

The screenshot shows a software window titled "Amendment Details". At the top, it says "Current View: All". Below that, it indicates "0 Item(s)" and "Page 1 of 1". A "Display" dropdown is set to "100 items per page". A table with columns "No.", "Reference", "WBS Code", "Code Name", "Short Description", and "Amount" is visible but empty. A callout box points to the "Amendment Details" title bar with the text: "Click on 'Amendment Details' to make this section larger." Another callout box points to the "Add" button in the bottom toolbar with the text: "Click on the Add button to start adding in the amendment details." The bottom toolbar includes buttons for "Add", "Copy", "Import", "Remove", "Grid", and "Find". On the right, it shows "Total Amount: \$ 0.00". At the very bottom, there are links for "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

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

The screenshot shows a dialog box titled "Professional Services Amendments Line Item:". It has a "General" tab. Inside, there are several input fields: "Reference:" with a "Select..." button, "WBS Code:" with a text input and a "Select..." button, "Code Name:" with a text input, "Short Description:" with a text input, "Professional Services EDGE Certified?:" with a "No" button, "Amount (\$):" with a text input, "Subcontractor/Supplier:" with a "Select..." button, and "EDGE Certified Sub?:" with a text input. A callout box points to the "WBS Code:" field with the text: "If you are ADDING more money, go straight to WBS Code and SKIP Reference line. If you are DELETING money, click on the Professional Services EDGE Certified?:". At the bottom, there is a "Notes:" text area. The dialog box has "Attachments (0)" and "Linked Records (0)" links at the bottom left, and "OK" and "Cancel" buttons at the bottom right.

- 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.

Select WBS Code			WBS	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

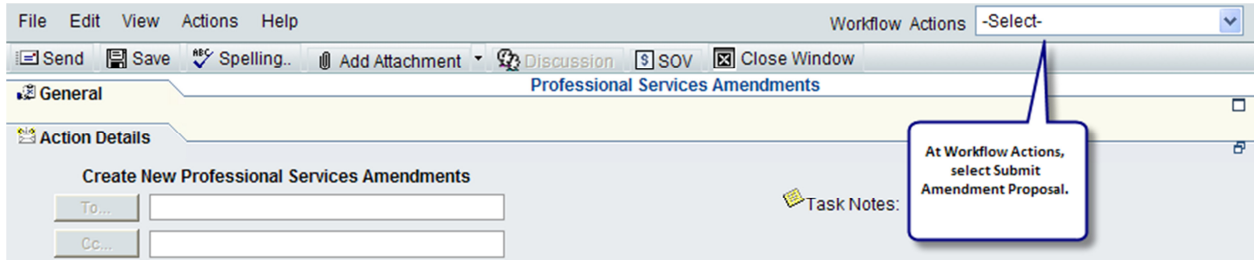
- Click on the Collapse button and then find the WBS Code needed. Highlight it, and click the Select button.
- Once you select a line, it will bring you back to the Professional Services Amendment Line Item box. Add a short description and put in the dollar amount.
- If any of this work is being done 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.