**Welcome to today's special
Client Enrichment Series event:**

PBS OASIS for Agency POCs

(Occupancy Agreement & Space Inventory System)

March 15, 2023

The presentation will start at 1 pm eastern

Note: Phones are automatically muted during the presentation. This session will be recorded. Please use the Q&A pod to engage with our presentation team.

Today's Speakers

Carlos Salazar
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PBS Office of Portfolio Management and Customer Engagement

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Today's Format

- An approximate 1 hour presentation and
  1 hour for Q&A

- Send questions to our presentation team via your
  Q&A pane

- All questions will be answered in writing in a formal
  Q&A document, posted along with the slide deck
  and session recording, on our website,
  http://www.gsa.gov/ces

GSA

Agenda

- The What and Whys
- OASIS Overview
  - Electronic OA Process
  - Approving an OA
  - Simplified OA Document
  - OA Timing
  - Other OASIS Activities
- The Ask and Next Steps
- Q&A Session

Audience Poll #1

Have you heard anything about OASIS?

A. Yes, I attended or reviewed a recording of a previous CES introducing OASIS

A. Yes, I've received some communication but haven't seen a presentation yet

A. No, wait, what's OASIS?

What is OASIS?

- GSA's new **O**ccupancy **A**greement and **S**pace **I**nventory **S**ystem

- Replacing
  - GSA's current OA and Drawing tools
  - eOA (Agency views of billing OAs)

- Moving the OA review and approval into an electronic system

- Providing access to your agency to view your OA data records

What is OASIS?, con't

- Allowing you to ask questions about your rent bills or occupancy agreements

- Moving the Release of Space process into a system and allowing you to follow its progress throughout the release

- **Go Live Date - July 5, 2023**

Why is my name on the POC list?

- Your agency identified you as their POC for the OASIS implementation

  - GSA started with your agency's OCFO and worked through operations

- After this presentation, if you think you are not the right person for POC, talk to your agency and then send any changes to ***PBSOasis@gsa.gov***

What is the POC Role?

- A single contact for your agency for all implementation planning activities

  - Provide GSA a list of your agency's users

  - Pass along communication from GSA to agency stakeholders

  - Ensure agency processes are ready to review OAs and submit releases in OASIS by Go Live

The OASIS Process:
The System and Policy Changes

Audience Poll #2

Do you currently review or approve OAs?

A. Yes

A. No

A. What's an OA?

What is Staying the Same?

- The OA remains the financial rent agreement document with GSA

- OAs can be downloaded as pdfs

- CPAs are used as project planning documents with estimates

- RentEst and Rent on the Web (ROW) remain

What is Changing?

- You will no longer receive OAs in email or mail

- Someone electronically must approve your OA in OASIS

- The OA document will look different

- OAs will be sent with less frequency

- You will always be able to open and view your OA data without going through GSA

OAs Will Not Be Emailed:
OASIS Electronic OA Process

- Entire OA process will be inside OASIS

  – No more wondering who got an OA or where it's at in the agency or if someone else approved it already

  – For GSA it will be clear who in an agency should receive the OA

- OAs sent, reviewed, approved, and tracked in OASIS

- All OAs sent to a central queue for your agency
  - You can assign and reassign the OAs internally
  - You can set up an internal process for passing OAs through different levels of review using the Reassign function

OAs Will Not Be Emailed: OASIS Electronic OA Process, continued

- You can sort and filter your OAs

- OA status is viewable and reportable

- You can still download and save the OA document and even electronically sign it for your records

- You will receive notifications in the system and an email when your action is required

Approving OAs – part 1

- Instead of signing an OA, agency users will click "Approve" in OASIS

- Users who can click "Approve" are called Ordering Officials
    - Each agency determines who their Ordering Officials will be
    - Each agency determines their internal process for approval

Approving OA's – part 2

Some examples:

- Agency A's current OA signer is Jane
    - Jane can be in OASIS and formally approve the OAs

- Agency B's current OA signer is Bob, but Kathy has to review it first
    - Both must be OASIS users
    - Kathy can review the OA first and then reassign it to Bob once it is ready for Bob to formally approve the OA

Approving OAs – part 3

Some examples cont.:

- Agency C's current OA signer is their CFO Megan, who signs after Tom's team reviews the OA

    – Tom can be in OASIS and once his review is complete, he can download or print the OA for Megan to sign/approve

    – Once Megan approves/signs, Tom can hit the approval button to record Megan's approval

Approving OAs – Summary

Summary:

- Multiple ways agencies can internally manage their review process

- GSA's only requirement is that someone is selected who can make the approval in OASIS

Current OA Activities

- What about OAs we've already signed for ongoing projects?

  - At Go Live will honor OAs that were signed in our current environment through FY24

- These OAs will appear in OASIS when they are finalized for occupancy or if they need to be sent to you for updated signature

OA Document Improvements – part 1

Issue: Need an Update to Improve the GSA and Customer OA Experience

- Boilerplate text didn't apply to every occupancy and contained information already in Pricing Policy

- Difficult to quickly find occupancy information

- Financial pages showed blended rates

- Inconsistency in some ad hoc clauses

OA Document Improvements – part 2

Improvements

- Boilerplate text was removed and added to the Pricing Desk Guide (PDG)

- Format simplified into table format

- Rates shown with effective and expiration dates, eliminating blending when a rate changes mid-year

- Blended rates eliminated by breaking out blocks of space when needed

- Majority of clauses removed (broker commission, free rent, agency funded shell will remain)

OA Document Improvements – part 3

- No **ad hoc** or **agency-specific clauses**

  - Ensures consistency

  - Avoids unapproved deviations from policy

  - Info in these clauses is generally already in OA (e.g., parking spaces, TIs)

- Removing clauses does not change policies, e.g., cancellation rights, OA will still indicate if it's cancelable or not cancelable

OA Summary

General Information

OA Number	OA Type	
AAK03333	Owned	

AB Code	AB Name	
4766	PUBLIC BUILDINGS SERVICE (FIELD OFFICE)	

Cancellable	Revision	Amendment Reason
Cancellable	300	

Customer Identifier 1	Customer Identifier 2	Customer Identifier 3

Commencement Date	Vacate Date	Escalation Month
10/02/2022		October

Clause Summary

The customer agency will pay the General Services Administration rent in accordance with PBS Pricing Policy and the OA summary information. The rent will be adjusted annually as per PBS Pricing Policy.

Location Information

Location ID	Location Name	Address	City	State	Zip Code	Region
AK0001	ANCHORAGE HISTORIC FEDERAL BUILDING	605 W 4th Ave	ANCHORAG	ALASKA	99501-2248	10

Usable Sqft	Rentable Sqft	R/U Factor
466.39	615.63	1.32

OA Summary Image – Part 2

OA Summary

Shell Rates	Description	Expected Cash Amount	Amount per Year	Cost per Unit	Contract Rentable	Start Date	End Date
010 Shell Rental Rate General		$828.90	$9,946.80	$16.29	610.61	12/01/2022	12/31/2030

Rates	Description	Expected Cash Amount	Amount per Year	Cost per Unit	Contract Rentable	Start Date	End Date
160 Pro Rata Joint Use Charges Building Amenities		$49.53	$594.36	$594.36	1	12/01/2022	09/30/2023
030 Operating Costs		$385.93	$4,631.16	$7.58	610.61	12/01/2022	12/31/2030
102 Security Services Building Specific Amortized Capital - GSA		$24.32	$291.84	$.48	610.6	12/01/2022	09/30/2023

OA Document Improvements

- OA document will record who approved the OA along with the date and time in a footer

- OA includes 3 customer-identified fields that customers can fill out to help with internal tracking when approving the OA

OA Timeline - Creation and Approval

- OAs created once final offers received

  - No more draft OAs sent with project estimates and estimated market rents

  - Signing occurs at the point of agency financial commitment; using actual amount

  - Most projects will only require this one OA approval; revisions only need if there's a mid-project change order

    - Decreasing volume and allowing for more thorough and accurate reviews

OA Timeline - Creation and Approval, con't

- Every OA will represent an imminent contract award

  – Agency approval needed for timely award

- Early cost estimates (prior to the OA stage) are communicated using the **CPA** and other planning documents

- During the project, GSA communicates with customers through project meetings and updates

Access to Your OA Data

- At Go Live you will get access to all of your currently billing OA data
  - Ability to see future rates, square footage, terms
  - Ability to save, print, or view your information at any time
  - Drawings (federally owned only) will be added as new OAs come online
- Any new OAs are viewable as soon as they are sent to you and will remain available
  - You'll always be able to go back and see what was previously approved

Access to Your OA Data, con't

- Ask a Billing Questions feature
  - Can submit a question to GSA and track its review
- Releases of Space feature
  - All releases will need to be submitted in OASIS
  - Can track the approval and timeline of the request
  - Once released, fast and easy billing update
    - Will limit late actions
    - Able to search and view for your agency reporting needs

GSA

The Ask and What's Next

The Big Next Step

- GSA needs you to identify your OASIS users by **May 15th**

  - Those that will be approving OAs will be Ordering Officials

  - Other users can be designated as Read Only

- Users can cover multiple AB Codes
- Training for users will occur in July
  - Virtual, self paced with a few additional town halls to cover specific topics

The Big Next Step, con't

- Ordering Official licenses are not unlimited

- While there is not a maximum number of licenses for each agency, we need to be fiscally responsible and keep the OA process manageable

  - As an estimate, we think agencies will have about <u>5 Ordering Officials per AB Code</u>
  - Larger agencies will need more
  - Be reasonable, but send us the number you think you need
  - We'll discuss the number with you if it exceeds our total license availability

User Name Submissions

- Send the names of your AB Code's Users by May 15

  – Send to the pbsoasis@gsa.gov mailbox

  – Include First Name, Last Name, Email Address, AB Code(s)

Other POC Actions

- Help your agency adjust to the new OASIS process

    – Communicate the changing process for receiving and sending OAs and for releases of space

    – Determine how you will organize your Ordering Officials and the internal process for reviewing and approving OAs

    – Submit questions to the pbsoasis@gsa.gov

Audience Poll #3

As a result of attending today's session, how much more informed do you feel about the July 5 implementation of OASIS?

- *Significantly More Informed - I totally understand what to expect*
- *More Informed - It kind of makes sense now...we'll see...*
- *About the Same - I now have new questions and need more clarity*
- *Worse Off - You guys lost me...I definitely will need more support to prepare for this change*

Question and Answer Session

OASIS Resources for Customers

Visit our
__OASIS__ website

View __OASIS Overview__
__CES Sessions__
(September 8 ,2022 or April 5, 2022)

Contact us at
__PBSOasis@gsa.gov__

Stay Tuned for Upcoming CES Sessions!
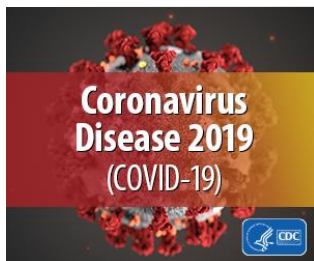
Understand Your Workspace Usage With Daily Occupancy Data
March 16th 2pm-3pm Eastern *Register Now*

Climate and Sustainability

Reimbursable Work Authorization (RWA) Policies and Practices

Lease Delegations

Fast Track Space

GSA's COVID-19 Resources for Customers

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