GSA Public Buildings Service

Client Enrichment Series

OASIS Update

Thursday, April 11, 2024
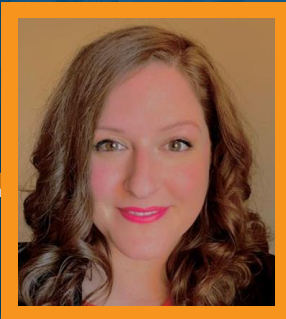
Introductions

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OASIS Update

The presentation will start at 1pm EDT

Please Note

Phones are automatically muted during the presentation.

Please submit your questions via the Q&A pod and our team will answer as many questions as possible during the presentation.

Questions will be responded to in writing in a formal Q&A document, posted along with the slide deck and session recording, on our website, https://www.gsa.gov/ces

Agenda

Poll Question #1

Question: Are You a Current OASIS Ordering Official?

a) Yes

a) No, not yet, but my Ordering Official access is pending

a) No, I oversee or support our Ordering Officials but am not a current system user

a) I'm not quite sure??

a) No, just here for general knowledge

Poll Question #2

Question: For our Ordering Officials: Have you received an OA to approve yet?

a) **Yes, and I was able to approve it**

b) **Yes, but our agency isn't ready to approve it just yet**

a) **Yes, but I haven't been able to approve it yet because of a technical/system issue**

a) **No, I have not yet received one to approve**

Introduction and Background of OASIS

Victoria Morrell

Past and Present

What you can expect from the OASIS going forward

- **An improved Customer Workflow**

    - Working to simplify the OA approval process within OASIS

    - View Only Access roles

- **Increased Communications including a bi-weekly newsletter**

- **Continued Clean up of the system including stuck OAs, etc.**

- **Advanced Reporting Team**

01   PBS OASIS What It Is

PBS OASIS

What It Is

— **Background on the system**

— **Policy Improvements**

What Is PBS OASIS?

GSA's Occupancy Agreement and Space Inventory System

- ○ **Manages all GSA Occupancy Agreements (OAs) and feeds the Rent Bills**

- ○ **Distributes OAs directly to customers for approval**

- ○ **Provides customer order officials access to all current OAs**

What is PBS OASIS?

— **PBS OASIS replaced GSA's aging OA Tool, eSmart, DARTs, and RBMT systems and brought the patchwork OA process into a centralized system**

— **OASIS went live August 22, 2023**

OA Tool

eSmart

DARTs

RBMT

→ OASIS

What is an Occupancy Agreement (OA)?

— **What is an OA?**

- ○ **Formal interagency agreement between GSA and the customer that outlines specific rental terms used to bill the customer**

- ○ **Trigger for GSA to award a contract**

- ○ **Forms the basis of the rent bill**

PBS OASIS System Parameters

— **OASIS cannot be agency customized**
  ○ **GSA is reviewing the Customer Workflow process in order to make it simpler for agencies to identify OAs, sort, etc.**

  ○ **That said, each agency has unique processes around OA approvals and will need to maintain their own process outside of OASIS**

— **The system does not contain historical (pre-OASIS) rent information**
  ○ **Billed rent data (or several fiscal years) is available in the PBS Customer Dashboard**

— **The new streamlined OA is no longer an all encompassing budget document**
  ○ **The OA is provided to customers when the award is known and imminent and reflects actual known billing terms**
    ■ **The OA is no longer provided as an initial planning document**
    ■ **Does not contain future estimated terms, including operating cost escalations**
      ● **The Rent Estimate provided through the GSA OCFO office does provide 2 years of rent projections**

Policy and Process Improvements

OA Timing

Square Footage Variances and Rounding

Tenant Improvements (TI)

Joint Use

Ad Hoc Clauses

Policy and Process Improvements – OA Timing

OA Timing

— **GSA no longer sends multiple draft OAs throughout the life cycle of the project to provide ongoing project estimates.**

○ **The CPA is sent at the completion of the Strategic Requirements, and then costs should be communicated by the project manager through the balance of the life cycle, until an OA is required**

Policy and Process Improvements - OA Timing con't

OA Timing

— **Occupancy Agreements are now sent only when an award is imminent and approval is required to move the project to the next phase.**

- ○ **OA is a reflection of the actual "deal"**

- ○ **Review and approval turnaround are critical to ensure we do not lose the award**

Policy and Process Improvements – Square Footage

Square Footage Variances and Rounding

- ○ **Rentable/Usable factors reduced to 2 decimals**

- ○ **Monetary amounts rounded to dollars and 2 cents**

- ○ **Square footage rounded to 2 decimals**

- ○ **OA shows both Location "Assigned" sqft and Billed rsf**
  - ■ **Vary due to rounding and measurement changes**

- ○ **Rent bills do not reflect a usable square footage or R/U**

Policy and Process Improvements – Tenant Improvements

Tenant Improvements (TI)

- ○ **Billed as a monthly dollar amount and not a rate per sqft**

- ○ **OA Summary shows the total term**
  - ■ **OA Record in OASIS shows the planned effective and expiration date**

- ○ **Reflects the amount being awarded**
  - ■ **May be a later TI reconciliation that reduces final TI spent**

Policy and Process Improvements – Joint Use

Joint Use

- Joint Use was removed as a separate line item in October 2023 (FY24)

- Joint Use is now part of common space and reflected in the R/U

- Will not see it on your OA or Rent Bill

Policy and Process Improvements – Ad Hoc Clauses

Ad Hoc Clauses

- ○ **OA Clauses reduced and streamlined**

- ○ **9 specialized clauses for specific condition such as free space, agency funded shell, non-cancellable**

- ○ **Agency Specific and Ad Hoc Clauses are not permitted**

02 Current Status and Game Plan

PBS OASIS

Current Status and Game Plan

— **Current Status**

— **Billing Challenges to Date**

— **User Access**

— **Customer Approval Workflow Challenges**

Current Status

— **OASIS launched between August and September billing 2023**

— **Since Going Live:**
  - **Stabilizing customer agency rent**
  - **Addressing GSA reporting gaps**
  - **Identifying critical system fixes**
  - **Standardizing customer access**

— **Currently on a rapid 2-week release cycle to identify and quickly fix errors**

— **Transitioning to customer approvals, reporting, and drawing related fixes**

— **Held 20 customer listening sessions**

Billing Challenges To Date

— **GSA Rent Collection is currently in line with historical revenue and expected estimates and there are no systemic billing issues at this time**

— **Past Issues That Have Been Corrected**
- **Incorrect rsf displayed on some rent bills (billing dollars were accurate)**

- **Multiple Escalating PBS Fee Billing Adjustments**
  - **Corrective adjustments issued on February Billing Cycle**

- **Duplicate lease operating cost charges**

- **Delayed billing on individual OAs as GSA and customers adjusted to OASIS**

User Access

— **Brand New Process**

— **Two Step approval process**
- **Individual requests access with supervisor**
- **Approved by the Customer Internal Authorizing Official (CIAO)**

— **Initially GSA facilitated the CIAO approval piece leading to long delays on both sides**
- **Streamlined our process**
- **Requester individually coordinates with their CIAO**

— **Delays in adding new users to their OAs**

— **Accounts Disabled after 90 days**

Change Management, Communication, and Training

— **Communication**

- ○ **Infrequent and Lagging**
- ○ **Inability to hold individualized customer meetings**

— **Change Management**

- ○ **Misunderstanding of OASIS customer role**
- ○ **Multiple and diverse customer user needs**
- ○ **Balancing customer needs with other system stakeholders**

— **Training**

- ○ **Recorded sessions not heavily viewed**
- ○ **Users lacked knowledge on where to find them**

Customer Approval Workflow

Significant system bugs with the customer approval process

- Inability to see the buttons on some OA approval action items

- Reassign and resend feature was not correctly routing OAs
- OAs would get "stuck" in the queue and would not progress to the next stage

- Early OAs were sent before all users had access

- Routing issues with inactive users
- Inability for GSA to pull back OAs that were sent in error or were "stuck"

- Notifications and email reminders were not consistent or broken

- Lack of view only rights

03 New Customer Approval Build

PBS OASIS

New Build: Customer Approval Workflow

— **View Only Role**

— **Routing and Tracking**

— **Action Items and Notifications**

— **Training and Communications**

Revamping the Customer Approval Workflow

— **Changes are Coming….**

  ○ **Based on customer listening sessions, a review of service tickets, and sessions with the system developer the OASIS project team is moving forward with a rebuild of the customer OA approval module**

Revamping the Customer Approval Workflow – Game Plan

— **Requirements are being finalized and team is still working to determine potential solutions for the design**

— **Rebuild will take approximately 2 months to complete**

— **Focused on pain points that prevent the OA from being approved**

— **OASIS cannot be agency customized at this time.**

— **This redesign build will not include the workflows for billing questions and release of space processes at this time.**

— **Will include a Customer "View Only" user role with limited licences**

Revamping the Customer Approval Workflow - Features

✓   **Less complex routing workflow with OAs available to all users with the AB Code**

✓   **No Accepting or Re-assigning action items**

✓   **Ability to see which OA actions are with your agency for approval and who is working on it**

✓   **Improved notifications**

✓   **Ability for GSA to withdrawal OA requests**

✓   **A clean up of all Action Items/OAs that have been sent to the customers thus far**

✓   **MORE TO COME!!!**

Revamping the Customer Approval Workflow - Support

— **Non-Release Items**

- Working with GSA OA editors to improve the quality of the OAs
- Adopting regular communication and expanding the communication tools around the OA process

- Customer User Guide will be updated
- Training
  - Two live sessions following the rebuild
  - New recorded video sessions

We will keep all customer users informed as the design comes into sharper focus

04 Communications, Reporting, and Self Service Tools

PBS OASIS

Communications and Self Service

— **OASIS Bulletin**

— **Reporting**

— **Training and User Guides**

Communication

— **OASIS Customer Bulletin**

    ○ **Inaugural Issue coming soon!**

    ○ **Sent to all OASIS customer user roles**
       ■ **Other users can subscribe to the Bulletin by emailing pbsoasis@gsa.gov**

    ○ **This will be sent bi-weekly**

— **Topics will include**

    ○ **System Updates and Release Notes**

    ○ **Policy Changes**

    ○ **Tips and Tricks**

    ○ **General Announcements**

Reporting

- **GSA is working on creating interim and long term reporting solutions**
  - **Interim Solutions**
    - Gathering prior customer reports to see where we can fill a majority of the requirement
      - A lot of data is currently available via the PBS Customer Dashboard on D2D (https://d2d.gsa.gov)
      - It may not contain all data elements you were receiving but a large number are currently available on the Occupancies, Rent, and Locations tabs.
      - Accessing the PBS Customer Dashboard
    - More to come on interim solutions soon

  - **Long Term Solutions**
    - Evaluating customer needs
    - Creating options to meet both GSA's and customers long-term needs
    - Looking to provide a self-service solution
    - More to come on long term solutions

05

Quick Tutorial on Current Process

&

Q&A Panel

Customer Approval Workflow – Your Action Items

Customer Approval Workflow – "Accept" an OA to Review It

Customer Approval Workflow – Accepted OAs in Your Queue

Home /

Action Items

Personalize | Open In New Window | Add to Bookmarks | My Bookmarks

Action Items

Accept

	Action	Record Name	Type	Due	Status	From
☐	Required Review	Real Estate Contract-AAR03065-301-1555113	Approval	04/08/2024 17:15:10	ACCEPTED	Soper, Arissa - 1003994
☐	Required Review	Real Estate Contract-AAL02779-301-1555112	Approval	04/08/2024 17:10:44	ASSIGNED	Soper, Arissa - 1003994

Q&A

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PBS OASIS

Support Resources Self-Service Tools and FAQs

— **Website: www.gsa.gov/pbsoasis**

  ○ **Training Videos**
  ○ **User Guide**
  ○ **and more…..**

— **Requesting Access**
  ○ **Customer Access Form**

— **Email: PBSOasis@gsa.gov**

— **Next OASIS Update - PBS National Customer Forum - May 7th**

— **Client Enrichment Series - PBS Customer Dashboard - Reporting Made Easy! July 11th**

Poll Question #3

Question: After attending today's session, how much more informed do you feel about the current state of the PBS OASIS tool?

a) **Significantly more informed**

b) **Somewhat more informed**

a) **Not much more informed, I still have many unanswered questions...**

Poll Question #4

Question: What did we miss? What aspects of the OASIS system would you like us to cover in more detail?

(choose all that apply)

a) **Live System Demos / Scenarios**

b) **Billing / Sq Ft Issues**

a) **Site Navigation**

a) **Views / Reporting Capabilities**

a) **Routing / Customer Workflow**

a) **Other (please specify in the "Chat" pane)**

Thank You

Join us for these upcoming Client Enrichment Series events…

Safeguarding Assets -
Risk Management for Federal Real Property

Thursday, April 18th
1pm-2:30pm EDT

Register Today!

eRETA Digest

Thursday, May 9th
1pm-2:30pm EDT

Register Today!

PBS Customer Dashboard -
Reporting Made Easy!
Thursday, July 11th
1pm-2pm EDT

Register Today!

PBS National Customer Forum

Tuesday and Wednesday
May 7th and May 8th

Register Today

Watch CES sessions on ▶ YouTube
Bookmark and watch all your favorites!

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