Welcome to today's presentation:

Policy and Process Changes for Occupancy Agreements

An Introduction to OASIS
(Occupancy Agreement & Space Inventory System)

April 5, 2022

The presentation will start at 1 pm eastern

Note: Phones are automatically muted during the presentation. You can send questions to our presentation team via your Q&A pane and the team will answer as many questions as possible during the presentation. 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 logo]

Today's Speakers

Our Presentation Team

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Agenda

- OASIS Background
- OASIS: Receiving, Reviewing, and Approving OAs
  - Sample New OA
  - Customer User Roles
- Timeline for Creating and Sending OAs
- Pricing Policy Changes
- Releases of Space
- Q&A

Audience Poll

Do you currently review or approve OAs?

- Yes
- No

What is OASIS?

- GSA's new Occupancy Administration and Space Inventory System, replacing OA Tool and eOA

- Used to manage the GSA OAs and Drawings

- Customer access portal

OASIS Schedule

- Targeting April 2023 Go Live
  - Training January/February 2023
  - RentEst schedule not affected

- Policy changes expected FY23

- Process changes for OAs starting now

What is Staying the Same?

- OA - still the financial agreement document with GSA

- Downloadable .pdf OA

- RentEst and Rent on the Web (ROW)

- Release of space rights

How Will You Use OASIS?

- Self-service portal to access:

  – rent data

  – OAs: receive, review, and approve

  – assignment drawings

  – ask questions about a rent bill

  – releases of space notices

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Audience Poll #1

Are you currently a user of our eOA tool?

- Yes, frequently (at least monthly)
- Yes, occasionally (at least quarterly)
- Yes, but only rarely (at least yearly)
- No, what is eOA?

Audience Poll #2

Are you currently a user of our Rent on the Web (ROW) tool?

- Yes, frequently (at least monthly)
- Yes, occasionally (at least quarterly)
- Yes, but only rarely (at least yearly)
- No, what is Rent on the Web (ROW)?

OASIS - Receiving, Reviewing, & Approving OAs

Receiving & Reviewing OAs

- All OAs sent through OASIS
    - Sort and filter your OAs
    - Run reports
    - Notifications in system
    - No emails, unless your action is required
- View OA data in the system or download .pdf
- Circulate internally

Sample OA Format

OA Summary

General Information

OA Number	OA Type	
ACA20031	Owned	

Cancellable	Revision Number	Amendment Reason
	0	

Customer Identifier 1	Customer Identifier 2	Customer Identifier 3

Commencement Date	Vacate Date	Escalation Month
09/23/2021	09/23/2023	October

Location Information

Location ID	Location Name	Address	City	State	Zip Code	GSA Region
CA0001	California 01	333 C Street	ACTON	CALIFORNIA		09

Usable Sqft	Rentable Sqft	R/U Factor
132.9121	51.2195	1

RGA Contact
Logan Noll

Financial Information

PBS Fee Percent	PBS Fee Annual Amount
0%	$0

Financial Information

PBS Fee Percent	PBS Fee Annual Amount
0%	$0

Tenant Improvement	Description	Principal Amount	Monthly Amount	Interest Rate	Duration
020 Tenant Improvement Used	Tenant Improvement costs	$55,000.00	$4,617.79	1.385	12

Shell Rates	Desciption	Monthly Amount	Annual Amount	Cost per Unit	Rentable Sqft	Start Date	End Date
010 Shell Rental Rate General	Shell Rental Rate for General Space Excluding WRH, TFC, and GNS	$64.02	$768.29	$15.00	51.22	10/01/2021	09/30/2023

Shell Rates	Desciption	Monthly Amount	Annual Amount	Cost per Unit	Rentable Sqft	Start Date	End Date

Rates	Description	Monthly Amount	Annual Amount	Cost per Unit	Rentable Sqft	Start Date	End Date
030 Operating Costs	Operating Cost for General Space Excluding WRH, TFC and GNS	$.00	$.00	$.00	51.22	10/01/2021	09/30/2022

Zero Sqft Rates	Description	Monthly Amount	Annual Amount	Cost per Unit	Number of Items	Start Date	End Date
250 Antenna Charges		$8.33	$100.00	100	1	10/01/2021	09/30/2022
120 Structured Parking		$25.50	$306.00	153	2	10/01/2021	09/30/2022
130 Surface Parking		$.00	$.00	0	1	10/01/2021	09/30/2022

Sample OA Content

- Removed boilerplate clause language

  – All language in Pricing Desk Guide

- Limited clauses to address specific terms such as free space, broker commission credits, planned relocations

- No ad hoc or agency-specific clauses

  – Ensures consistency

  – Avoids unapproved deviations from policy

Approving OAs

- Click approve in the system

- Can add unique identifiers for your agency

  – Up to 3 fields

- Real-time OA status

  – In progress, approved, billing

- Track revision history and review change analysis reports

Approving OAs – Approval Details

Approval: Real Estate Contract-AAK20000-0-1091331

🖶 Print   ⑦ Help

General   Advanced   System   Calendar   Workflow ▶ ⩔   **Approve**   **Reassign**   **Request Clarification**   **Return**   **x**

(Required): To setup up an approval, select the approval options and rules. During approval the status of each reviewer can be seen in the routing list.

Attention!

Occupancy Agreement-AAK20000-0 requires your review. To access the record, click Record for Approval in the Record Information section below. When you have completed your review, go to the bottom of this screen and select either Approve, Reassign, Request Clarification, or Return.

Record Information

Record for Approval **AAK20000-0**

Snapshot Approval Snapshot - AAK20000 - 1 - 03-31-2022.pdf

Approval Details
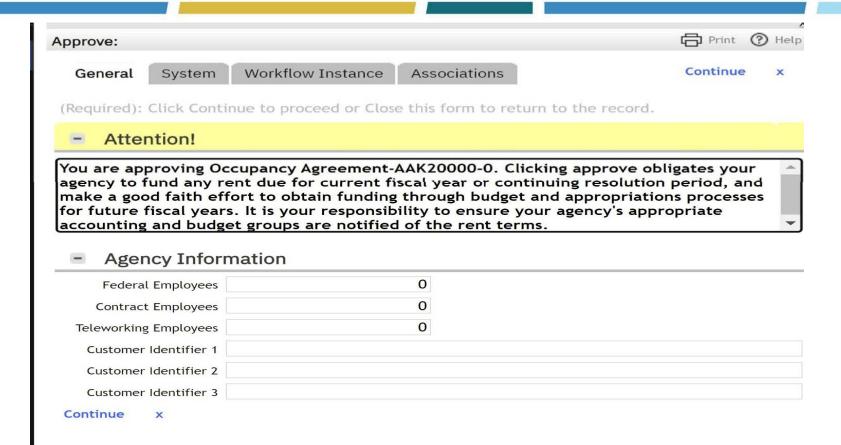
Submitted By Michael Shannon   Approval Status Review In Progress

Currently Assigned To Allison Heck

Reviewer List

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Approving Oas – Agency Information

Approve: 🖶 Print   ⑦ Help

| **General** | System | Workflow Instance | Associations | **Continue**   x |

(Required): Click Continue to proceed or Close this form to return to the record.

− Attention!

You are approving Occupancy Agreement-AAK20000-0. Clicking approve obligates your agency to fund any rent due for current fiscal year or continuing resolution period, and make a good faith effort to obtain funding through budget and appropriations processes for future fiscal years. It is your responsibility to ensure your agency's appropriate accounting and budget groups are notified of the rent terms.

− Agency Information

Federal Employees	0
Contract Employees	0
Teleworking Employees	0
Customer Identifier 1	
Customer Identifier 2	
Customer Identifier 3	

Continue   x

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Disapproving OAs

- What if I don't approve?

  - Request clarification

  - Reject

  - Reassign to another user

Customer User Roles

- Read-Only: view agency OAs, run reports, submit releases of space and billing OA questions to GSA

- OA Ordering Officials

  - Receive OAs in a queue

  - Approve/reassign/request clarification

Customer User Roles – The "Who"

- Each agency:

  – Determines who is authorized to approve OAs

  – Can add/change internal user rights

  – Can have multiple AB codes under your role

- Estimate 5 OA Ordering Officials per AB code

Customer User Roles – Obtaining Access

- Next Steps:

  - GSA will solicit user names Q1 FY23

  - All users will need an OMB max.gov account

    - All agency users and computers are able to access max.gov

Timeline for Creating and Sending OAs

OA Timeline - Creation and Approval

- OAs created based on final offer

  – No longer sent as estimates

- Approval needed timely for award:

  – Construction award for owned

  – Lease award

- Most projects will only require this one OA approval

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OA Timeline - Communication

- Prior to the OA stage, GSA still communicates project info to the customer using CPAs, and other planning documents

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

OA Timeline - CPA

- CPAs used to plan projects
  - Outline the estimated sf and costs
  - Based upon strategic requirements
  - RentEst and the CPA will provide information needed for your budgeting process

- GSA will no longer provide a draft OA with the CPA

OA Timeline - Changes

- Why the change?

  - Overwhelming volume of OAs and versions

  - Early estimates lead to multiple revisions

  - No financial commitment before lease award / owned construction award

  - CPAs and RentEst give you the budgeting information you need

OA Timeline - Benefits

- Benefits
  - Every OA you receive will have actual costs not estimates
  - Every OA you receive will mean that a contract is ready to be executed on your behalf
  - Significant reduction in review volume
  - Trackable/reportable status
  - One place to find the OA data you need

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Audience Poll #3

*How familiar are you with PBS' **Pricing Policy** or the **Pricing Desk Guide**?*

- Very familiar, I use it all the time
- Somewhat, I know where to find it when I need it
- Not very, I know it's out there, but never view it
- What is that?

Pricing Policy Changes

Upcoming Pricing Policy Changes

- Standardize Federal Operating Cost Escalation

- Standardize Federal Parking Rate Escalation

- Tenant Improvements Billing

- Standardize SDM Reviews

- Minimize OA Approval in Leases

- Open Ended Federal Occupancy Terms

Standardize Federal Operating Cost Escalation

- All Federal OAs will escalate operating costs annually in October rather than the anniversary date of the OA
  - Improves consistency and predictability of rent changes

- Planned FY 23 implementation

Standardize Federal Parking Rate Escalation

- All Federal OAs will escalate parking rates parking annually in October

  - Same OMB escalation factor used for operating cost escalations

  - Parking and Operating will have a consistent national process

Tenant Improvements Billing

- General and Custom TI combined into one rent line

- Billed at a monthly amount, not a rate per sqft

- OA authorizes the total TI principal and maximum amortization term

Standardize SDM Reviews

- Building Remeasurements: when the building is rewalked and the drawings are updated

  - When remeasured, sqft updates will be shared with agencies through OASIS

    - OAs are NOT updated at the same time

    - Once through the budget notification period, the changes will be pushed to all OAs in the building

OA Approval for Continuing Leased Space

- For extensions, renewals, and succeeding leases that stay in place, OA approval not required
  - GSA will only ask for OA approval for a non-cancelable assignment or when amortizing new TIs or increasing sqft

Open-Ended Federal Occupancy Term

- No expiration dates on most federal occupancies
  - Release of space rights remain
  - Reflects how agencies occupy and use owned space
- A "move out date" used for short term occupancies when needed
- Will still have individual rate expiration dates

OASIS Release of Space

OASIS Release of Space Process

- Release of Space process will only be in OASIS
  - Replaces previous written notice, release mailboxes, and manual tracking
  - No other submission method will be accepted (with a transition period)
  - Can be for full or partial space release

OASIS Release of Space Approvals

- GSA formally accepts or rejects the release request in OASIS

    – Once approved, the release remains in the system until the space is confirmed vacated

- Reports and notifications of pending releases are available

OASIS Resources for Clients

Visit our
OASIS site on
www.gsa.gov

Contact us at
PBSOasis@gsa.gov

Summary and What's Next

- First communication of many

- Submit questions to **pbsoasis@gsa.gov**

- Customer actions:

  - Consider potential changes to your current OA review process

  - Q1 FY23, PBS will request specific user names

  - Q2 FY23 User Training will be provided

Questions?

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Join us for our upcoming VIRTUAL CES sessions

eRETA Digest

May 10th, 2022   1pm-2:30pm eastern

Register Now

GSA's COVID-19 Resources for Customers

See our **COVID-19 Website** for our Emergency Response Activities

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