Client Enrichment Series – Q & A

Topic: PBS OASIS Update

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OASIS Related Resources
- **CES PBS OASIS Update Session Recording - Link**
- **PBS OASIS Website - www.gsa.gov/pbsoasis**
- **Email - pbsoasis@gsa.gov**
- **Access Request Form - Application Form**
    - **Account Inquiries - pbsoasisaccounts@gsa.gov**
- **National Business Space Assignment Policy (NBSAP)**

Client Enrichment Series (CES)
- **Series Website - Client Enrichment Series**
- **YouTube - CES Playlist**
- **Upcoming Class - PBS Customer Dashboard - Reporting Made Easy! July 11th**

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Q&A Responses (by category)

Access, Accounts and User Roles	*Release of Space*
Billing, Rent and Sq Footage	*Reporting*
Email Notifications	*Tenant Improvements*
OA Approval Process	*Training and Support*
Other	*Upcoming Changes to OASIS*

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Project Planning	

Access, Accounts and User Roles

Is the tenant agency limited to the number of PBS OASIS Ordering Officer accounts? The starter pack slide deck identifies 5 AB account (Ordering Officer)accounts per AB Code. How many View Only accounts are authorized per AB Code?

    A. Yes we still have license constraints for Ordering Officials and the new View Only role. The number of licenses is determined by the agency OA volume, but most agencies can receive at least 5. We will have information on the View Only license allowances as we move through the design rebuild.

When will view-only access roles be available? Would it be possible to develop access groups where each of our Regions can see their respective OAs, but not all OAs in process from the agency?

    A. The View Only role will be developed during the approval workflow rebuild. The current estimated delivery date is late June.

    While the system will not allow agency customization and cannot segment OAs based on customer categories, the new approval workflow (anticipated this summer) will look at simplifying OA identification.

Will view-only roles still be able to input billing inquiries?

    A. We will research this as part of the agency approval rebuild.

Our experience has been that the new access request forms (signed by the CIAO) are still not being processed timely by OASIS. What is GSA's timeline for processing CIAO-approved requests?

    A. Our IT group needs 5 business days from receipt of the form to complete the account setup. If you have examples of current requests that are outstanding please email pbsoasisaccounts@gsa.gov for a status and we will investigate.

Our Bureau only wants one Ordering Official for consistency and accountability. We do not want more people allowed to become Ordering Officials. How do we limit these "account requests"? View only might be an option later, but how do we maintain who requests access?

    A. The Customer Internal Authorizing Official (CIAO) must sign off on every request for agency access before GSA will create a customer account. The CIAO can control who gets access and limit the access per your agency's process.

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How may I get access to OASIS so that I can check my agency's OAs?

    A. The first step is to complete the User Access Form found on the bottom of this page <u>GSA OASIS External Site</u>.

When will PBS systems be PIV card access compliant in lieu of User ID/Password?

    A. OASIS is PIV compliant.

Please clarify the types of customer roles available in PBS OASIS and what they are titled/what they can do.

    A. Currently Customer Ordering Official is the only customer role in OASIS. This user can view all OAs associated with their Agency Bureau Code(s) and can approve or reassign OAs sent for agency approval.

What roles will be available with the new system changes?

    A. A Customer View Only will be added to review all OAs associated with a user's Agency Bureau Code(s). The Ordering Official role will remain the same.

If we have multiple ordering officials but only one with internal authority to approve, should only the person authorized to approve the OA accept it in OASIS.

    A. Currently you can also use the Reassign feature to Accept an OA, review the information, and then Reassign to the contact with internal authority to approve. This feature will be redesigned in the customer workflow rebuild.

Will OASIS access still require users to hold an OMB MAX account?

    A. OASIS currently requires users to hold an OMB MAX account. Plans are in progress to transition customers to <u>Login.gov</u> later in the year. More details to follow in the coming months.

How do we find out who the Customer Internal Authorizing Official is for our Agency?

    A. Email <u>pbsoasisaccounts@gsa.gov</u> with your agency name and bureau code, and we can respond with your CIAO's name and email.

Billing, Rent, and Square Footage

How can someone get access to the GSA OCFO for the 2 yr rent projections?

    A. If you are not currently on the Rent Estimate distribution list and would like a copy of your agency's estimate, please send an email to <u>GSA.PBS.Revenue.Division@gsa.gov</u> with your name, your agency/bureau, and your email address.

How do we get access to Rent on the Web?

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A. Here's a [Fact Sheet for our Rent on the Web (ROW) tool](#) that reviews access procedures. Here is the [ROW Customer Secure Access portal](#). Rent on the Web (ROW) is GSA's online portal for access to rent bills and billing related information, including:

> Monthly rent bills
> Furniture and IT (FIT) bills
> DHS Security Charges
> Rent Estimates
> Expiring Leases and Occupancy Agreements report
> Monthly ROW Newsletter containing agency billing and pricing contacts

Will PBS OASIS integrate with PBS ROW (Rent on Web)? Is ROW only accessible by federal employees? Will I be able to see extensions or expirations in ROW?

A. OASIS does currently integrate with ROW to display your monthly rent bill. ROW requires you have an agency email address but is open to federal employees and contractors. ROW does not show extensions or expiration dates.

Why were the future estimated terms removed? This is necessary for us to understand the potential costs in future years.

A. The OA reflects the actual billing charges. Annual operating and parking cost adjustment CPIs/OMB percentages are not known in advance and are therefore not included in the OA. Agencies that would like to continue to estimate future charges will need to do that outside of the OA.

Will one of the enhancements include adding the PBS fee cost as part of the payment data? Is there a way to separate costs by fiscal year like the old OA's so that we don't have to perform calculations by exporting the payment data, calculating the PBS fee, and subtotaling.

A. We can explore adding a PBS fee line to the financial information as a future enhancement, but please keep in mind the PBS fee is recalculated each time there is a billing change and is not a static amount.

The prior OA document used a blended fiscal year total to reflect any charges that were changing midyear, including estimated operating escalations. As the OA only reflects actual charges and doesn't estimate scheduled escalations, a blended fiscal year breakout is no longer feasible.

How do we get the total operating costs and tax escalations for an entire building so that we can verify our prorated portion of those costs?

A. Annual operating, tax and parking cost adjustment CPIs/OMB percentages are not known in advance and are therefore not included in the OA. GSA no longer provides this information within the OA document. The OA reflects the actual billing charges.

You are saying the OAs are "fixed" through the term, but mine are regularly changing with, what I assume are changes in square footage. Will this continue?

A. OA square footage should not change unless the agency expands/reduces space or GSA conducts a full SDM remeasurement of owned space. During the transition to OASIS and the removal of Joint Use, there was a one-time adjustment in square footage in October 2023.

Where is the shell expiration date?

A. The shell rate payment schedule is on the Payment tab of your OA.

What is the easiest way to find the total annual rent cost in an OA?

A. On a draft OA, sum the payment lines annual rent and apply a PBS fee if applicable.

On a billing OA, you can review the paid payments in OASIS or review the monthly ROW bill and multiply by 12 to view annual rent.

Monetary amounts rounded to dollars and 2 cents. Assuming GSA is rounding up and not down?

A. GSA uses standard rounding conventions. Numbers 5 and above, round up and 4 and under are rounded down.

We are still being billed unrounded rates, is this a phased change?

A. All rates should be rounded at this time. If you could send any examples of unrounded rates to pbsoasis@gsa.gov we can investigate.

Is it true that OAs in Federal Buildings no longer have an expiration date? We use that date for our Financial system and internal space re-justification process.

A. This is correct. OAs in federally owned space have annual terms that automatically renew each year unless a move out date is listed on the OA or the customer agency provides a release of space notice. The shell rate continues to be set for 10 years and can be used for your internal space process. Customer agencies continue to have 4 month release of space rights.

We continue to see many rent adjustments due to the OA backlog being entered into OASIS. When can we expect all OA's to be entered into OASIS and start billing as scheduled?

A. The workload is smoothing out and we've seen a significant increase in on time billing. Many late billing OAs are currently pending customer OA approvals. As those approvals are received, billing can begin.

Once the award is approved how long thereafter will the funds be taken out from our LOA (line of accounting.)

A. A rent bill will not be generated until occupancy has begun. Many leases are awarded months to years before occupancy to allow for buildout of the space. Once the space is substantially complete and the agency takes occupancy, a rent bill is finalized.

After submitting a billing question, how can I follow up with the person that replied to it if I have more questions?

A. You can submit follow up questions as needed or you can contact the responder directly through email.

If my billing request is pending for a while, how can I find out who it is assigned to so I can follow up?

A. If you have not received a prompt response, please email pbsoasis@gsa.gov.

We have several concerns about billing and the data provided in OASIS. Is it possible to schedule a separate meeting to discuss all of our concerns? Is there a phone number for someone we can talk to?

A. We will reach out to you to schedule a meeting with your team.

Since agency specific clauses and terms like free rent are excluded from OASIS, what documentation can agencies obtain to double check billing in ROW? Or maintain proper records of the lease terms. Are LCOs providing Price Negotiation Memoranda (PNM)?

A. Rental components, such as free space and free rent are reflected in your OA, which you should be able to reference against ROW. Agencies will rely on the GSA pricing policy for specific terms of the occupancy of the space that GSA leases on their behalf.

Agencies can obtain a copy of the lease agreement after it is fully executed but will not receive the PNM since that is a procurement sensitive document.

If I heard correctly, USF removed, Cost/sq. ft removed, most clauses - how does that help clients when all was in the OA? How can customers have access to all the information we used to see within the OA document?

A. Assigned usable square feet is available on the OA BIRT report and in the OA record (Location Tab). Cost/sqft was only removed for Tenant Improvements as TI repayment is based on a monthly principal amortization. Prior clauses were internally inconsistent and

not comprehensive of our PBS Pricing Policy. The Pricing Desk Guide is the source for boilerplate clause terms and conditions.

We used to see annual changes to the joint use RSF (common space, such as snack bars, cafeterias, etc) due to changes in occupancy, will we now see annual changes to the RU factor since it is incorporated into general space? How often will these changes take place?
- **A.** Changes to Joint Use common space should be rare and would only occur at the fiscal year transition. A change to JU would be reflected as a change to the RU.

What is an acceptable variance of square footage differences before GSA will make a change or update? We are seeing differences of 300+ square feet above the addition of joint use.
- **A.** The specific variances are dependent on the size of the OA. A variance of 300+ should be investigated by GSA though. Please send the specific OA number to pbsoasis@gsa.gov.

Will the OA ever display the unrounded R/U factor that we are billed on?
- **A.** No

When you rebuild can you please add the unrounded R/U factor so it is viewable on the OA?
- **A.** No, GSA has made the decision to change to a two decimal RU. That is the official RU factor.

Define "assigned sf"
- **A.** Assigned square footage is the space for which you are billed, and is sometimes known as "usable" square footage. Think of it as the area where your agency normally houses personnel or furniture. This is different from Rentable square footage (RSF), which is the area for which your agency is charged Rent; and may include a share of building support and common areas.

How do you get the USF from the RSF on the Payments tab?
- **A.** You can view the USF or measured usable square footage on the Location tab.

How can we determine the correct Joint Use (J/U) SF for an OA? The Admin OAs were received, but the increase from the previous RSF did not match the previous J/U SF for those OAs?

A. The Joint Use is now a component of the building common space. The RU was updated in FY24 to account for Joint Use space and any other measurement driven changes to the common spaces.

Will the RSF and USF in D2D match OASIS?
A. Yes, the USF and RSF in the PBS Customer Dashboard in D2D is in the process of being updated to reflect the assigned USF and RSF from OASIS. This should be done by the end of May. The billed RSF will be reflected on the Rent tab (billing records do not contain a USF, and therefore it is not available) with the assigned USF and RSF on the Occupancies and Locations tabs.

How can we as an agency verify the Sq Footage is 100% correct, before signing the OAs?
A. The OA will match the lease contract square footage or the drawing square footage (owned). The OA goes through an internal GSA review to ensure the OA space is correct.

How will complicated situations be dealt with now? Real life doesn't always fit in a box.
A. Unique circumstances, including ad hoc clauses, and situational questions can be sent to pbsoasis@gsa.gov or you can work with your regional contact to address specific situations and how they will bill though the OA.

For billing inquiries, we are no longer able to submit issues for OAs that are not currently being billed, but should be. How can we submit those issues?
A. Please send to pbsoasis@gsa.gov or contact your regional project point of contact.

Can questions about RSF and any changes be submitted through OASIS?
A. Yes, you can submit any billing or occupancy agreement questions, including square footage, through the OASIS Billing Question workflow.

Email Notifications

How do we get all notifications to come via email? Will email notifications get updated to identify the OA number in the subject line on every notification?
A. Notification improvements, both within the Notification section of the OASIS Portal and email notifications, will be made during the approval workflow rebuild. We will include the OA number and location identification in the subject line.

When OA's don't need a signature, can/will the tenant agency still get an email alerting us that a succeeding lease was awarded?

A. At this time no, but we will explore the notification process to see if it can be expanded and notify when new OAs are finalized.

OA Approval Process

What do you mean no accepting action items? I'm the only Ordering Official for my bureau, does that mean I don't need to accept it anymore?

A. If you are the only Ordering Official, the action item will be automatically accepted and assigned to you (Note: You will still need to "approve" the OA, however the "accept" button, currently moves the OA to your queue.)

Is there a flow chart available that covers the process from space inception to OA approval, as well as workflow for billing of utility overages, etc.

A. At this time we do not have a flowchart for the entire lease project process or the utility cost changes.

What is the timeline for approving OAs so we don't lose an award? This is helpful in ensuring we get our internal approvals in a timely fashion, since I'm responsible for that before I can approve the OA in OASIS.

A. We ask that OAs be reviewed and approved within 3 weeks.

Other

Can a modified date be added to the OA?

A. Within the OA record, the History tab provides the date and reason for any modification of that record.

When were the operating cost duplicative charges corrected? Which month?

A. November 2023.

How do we subscribe to the OASIS newsletter?

A. All OASIS Ordering Officials and CIAOs will automatically be subscribed to the new OASIS newsletter. Additional interested parties can email our main mailbox - pbsoasis@gsa.gov to be added to the mailing list.

What actions can the customer take if GSA does not honor the terms of the Occupancy Agreement

A. The PBS Pricing Policy governs all GSA occupancies. Questions or concerns about your occupancy agreement should be brought to your regional contacts and can be appealed and escalated to Central Office if unable to resolve.

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Is GSA changing the CFR because not enough information is provided to make a financial decision - not even for budgeting per §102-85.55. The terms and conditions are modeled after commercial practice. They are intended to reflect a full mutual understanding of the financial terms and agreement of the parties. The OA describes the actual space and services to be provided and all associated actual costs to the customer during the term of occupancy. The OA does not include any general provisions or terms contained in this part.
   A. GSA is working with OMB to update the CFR.

When will the Pricing Policy Guide be updated?
   A. The National Pricing Team is working through the issuance process.

Are agencies allowed to see leases along with OAs?
   A. After the lease is executed it should be provided by the Leasing Specialist to all relevant stakeholders including local and headquarters customer representatives. Pre-award leases are procurement sensitive and cannot be shared.

Will amendments to OA also be completed through OASIS requiring Agency approval by designated personnel?
   A. Amendments require approval if they increase the square footage or tenant improvements. Those will be sent through OASIS.

Can the Digest Action # or LA # to which the rent action is related be reflected in OASIS?
   A. No, this is not a feature of OASIS and the digest action information is GSA internal information.

I'd like to see a space designation as 'FEDERAL' or 'COMMERCIAL' (LEASED). Previously we knew by the building number (MA0000 was federal; MA3333 was commercial), but there's inconsistency now
   A. The building number did not indicate leased versus federally owned before. The occupancy right (OA Type) is shown in the All OAs query, OA record general tab, and on the OA BIRT report.

Prior to OASIS, when we received an OA, it included a copy of the floor plan that depicted the space under agreement in the OA. Is GSA planning to include similar floor plans with OASIS OAs?
   A. GSA has drawings and floor plans available for our federally-owned space. Lease space is covered by the lease contract. All new federal OAs will include a floor plan. Existing federal OAs will be transitioned over the next several years to link their plans directly to the OA record.

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My current PBS OASIS has only exterior drawings of the space occupied on the OA. How does OASIS store the drawings of the interior of the leased space? When will I be able to see that within the PBS OASIS system?

    A. OASIS does not store or provide leased drawings. The lease contract is the source document for the OA. Please reach out to your regional leasing team to request a copy of any existing floor plans for your leased space.

Why doesn't GSA require a lessor to provide a floor plan that depicts the space under agreement as part of the lease agreement? It heightens the risk to GSA and to the tenant agency if the space under agreement is not confirmed in a floor plan.

    A. The lease contract governs space assignment data in OASIS.

I heard OASIS is moving to use OMNICLASS for Space Classifications (Types). Is this true?

    A. GSA uses Table 13 - Omniclass Room Names with some variation. The complete list can be found in GSA's NBSAP guide.

Under the "Reviewer List" in OASIS, what should we do if there are people that are not responsible for reviewing or approving our Bureau's OAs?

    A. Specific OAs can be sent to pbsoasis@gsa.gov for review. Deann Salazar, the GSA OASIS product owner, will appear on all OAs as a safety check but cannot approve OAs.

Can I download an OA from OASIS? I can see that I can download a summary, but I would like to have access to the full OA document.

    A. The OA BIRT report is the official interagency OA document.

We have had many errors on old "inactive" OAs and with your update we are no longer able to enter a chargeback to GSA. How can we get the disputes resolved?

    A. Formal chargebacks can be submitted to GSA's OCFO office. Specific questions about OAs can also be sent to pbsoasis@gsa.gov for investigation.

Project Planning

Can we get updated Client Project Agreements (CPAs) when GSA updates the Rent Estimate?

    A. The CPA is a tool used to assist GSA and customers in the initial stages of space planning. It is not intended to be updated or modified after its initial development, therefore, the CPA does not get updated based on rent estimate information.

    The Rent Estimate is updated by GSA in the spring.

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If you have questions about future rates on projects after CPA completion, please work with your GSA project team to receive updated project information. For more information please visit the Occupancy Planning and Requirements site.

Should we expect updated CPAs as the project proceeds? We are finding that we are not aware of final pricing until we receive the OA and two weeks is not sufficient time if costs have increased.

A. As noted above, the CPA is not intended to be updated or modified after its initial development.

The CPA is a collaborative document that defines a project's strategic requirements and other occupancy considerations no later than 30 months prior to an occupancy expiring (12 months prior to the OMB submission for prospectus projects). While there may be financial information contained in the CPA, it is an initial estimate based on known project and market considerations at the time. Final square footage and rates may not be known when the CPA is signed.

If you have any questions about your future rates during the project planning process, please work with your GSA project team to receive updated project information prior to receiving an award OA.

Based on the PBS OASIS presentation this morning through 22 slides, what centralized management information system will GSA PBS internal stakeholders and federal agency stakeholders utilize to synchronize building management /leased space requirements?

A. Requirements development happens outside of the OASIS system. Once GSA and a customer agency agree on project requirements, GSA maintains records in an internal system. Customers should coordinate with their appropriate planning manager or customer lead to ensure synchronization during the requirements development process.

Succeeding lease- Some areas are requiring signed OAs prior to lease execution; however, I have a region that states that an OA is not required for succeeding leases. According to the price desk guide, if the rates or costs have increased, a final OA is required. As the end user, I'm confused if a succeeding lease is required or not required when rates increase.

A. In general, the succeeding lease does not need a signature as long as we are not changing square footage, adding Tenant Improvement or changing the cancellation rights. However, per the recent GSA asset management alert that went into place last year, we are changing cancellation rights on most leases to non-cancellable. Therefore, many succeeding leases are requiring a customer approval at this time.

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Why doesn't GSA provide copies of the planned lease document/pre-award lease document when the award is imminent and they are asking agencies to sign the OA? How do we know our requirements have been negotiated into the imminent lease?

A. Prior to the Request for Lease Proposal (RLP) being issued, the draft RLP package (including the special requirements and security requirements) to the requesting agency for approval. Any changes or updates to your requirements should be provided to your GSA Project Manager and Leasing Specialist prior to RLP issuance to ensure your requirements are properly captured.

Once the Lease is fully executed, the Leasing Specialist should provide copies to local and headquarters representatives of the customer agency.

Release of Space

What is the process to release space in OASIS?
A. You can complete the release of space request on your OASIS Portal. Please ensure you include the OA number. The request will then be sent to GSA for review and you will be notified of the decision.

Did OASIS cause GSA to stop providing 1204s when we release or accept space?
A. The 1204 Condition Survey Report document is still in use but may not be equally used amongst GSA regions or for actions completed in leased vs federal space. The document is not required to process a space release or new OA as part of the workflow in Oasis, but may still be part of the regional checklist with beginning a new occupancy or releasing space. Please work with your regional project team or leasing specialist if you have any questions about the documentation or would like to obtain a copy of a completed 1204.

We used to be contacted in 10 days when releasing space, is that still policy?
A. GSA's process requires a prompt response to all releases of space. The exact length of time can vary based on the complexity of the release and research required.

Reporting

Will there be any standard reports created? i.e., a report that will show how many OA finalizations that have been submitted for a group of people)
A. Yes, additional reports will be added to OASIS in the next year. PBS also has a reports team that is working on requirements and recommendations for customer reporting.

It's not easy to associate street addresses to the OA numbers. Can addresses be added to the "All OA" report, when downloading to excel?

A. We will add this request to our release backlog.

When can we expect portfolio level reporting from OASIS with all critical fields and payment schedules? My agency uses the PBS Dashboard, but it lacks payment schedules and draft/planned lease data.

   A. Additional reports will be added to OASIS in the next year. In addition, PBS has developed a reports team that is working on requirements and recommendations for customer reporting and additional functionality.

Tenant Improvements

Why aren't TI and Custom TI shown on separate line items?

   A. The tenant improvements on the rent bill were combined as there is no differentiation in billing between the two TI categories. The TI allowance is still separated into a general and a custom amount to meet the agency tier requirements during project planning and requirements development and project scoping.

What does GSA provide to agencies to document reconciled TI expenditures used in owned space?

   A. A Tenant Improvement Certification can be provided to document the principal amount spent on the project.

In owned space, at what rate is Allocated TI amortized?

   A. As of March 18th 2024, the TI Amortization rate for federal space is 4.335%.

When is TI Allowance communicated to the Agency?

   A. The TI Allowance is part of the project planning and strategic requirement stage. It is documented on your CPA and updated through the project planning as you elect to spend more/less or provide RWA funds.

Training and Support

Is there a new Customer User Guide reflecting the changes discussed today?

   A. The OASIS customer user guide is located on our OASIS website here, and outlines the current process. The guide will be updated and reissued to coincide with the launch of the rebuild.

As a large agency with hundreds of OAs, one of our main challenges is the policy change GSA implemented with OASIS regarding communication with customer agency staff on OAs. GSA's policy change to limit GSA regional staff from interacting only with Authorized Users in OASIS has resulted in considerable delays and a need for a significant increase in the number of OASIS Authorized Users. Is GSA reconsidering this

guidance and allowing Regional staff to resume coordinating on the development of OAs with customer agency staff that are not designated as Authorized Users?

A. The View Only user role should assist with the current agency gap and will allow non-approving users to ask billing questions etc within OASIS. PBS is committed to ensuring all OA documents are coordinated with the correct agency authorized individuals as designated by the agency.

Upcoming Changes to OASIS

Are we starting from scratch with this hard reboot or will OASIS remain functional during this rebuild?

A. OASIS will remain available in its current form during the rebuild. Please review the OAs to the best of your ability during this period, and report any issues to the pbsoasis@gsa.gov mailbox.

So, is that "Acceptance" no longer needed in the new rebuild?

A. We are still in the requirements and design phase and cannot provide any specific information on the new process. We will provide a new user guide, training, and updates on the process once available.