Client Enrichment Series – Q & A

Topic: **PBS OASIS is LIVE!**

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OASIS Related Resources

Visit our OASIS website - https://www.gsa.gov/pbsoasis

Review the OASIS Customer Guide - https://www.gsa.gov/system/files/GSA%20Customer%20User%20Guide.pdf

Watch OASIS Tutorial Videos - A series of 6 videos, ranging from 4 to 26 minutes in length, that cover a variety of OASIS use cases, including reviewing and approving OAs and release of space requests.

https://www.youtube.com/playlist?list=PLvdwyPgXnxxX83cZ_0IKoqI46YABS-B2y

CES session recordings on OASIS -

> **PBS OASIS is LIVE!** **-** 8/31/23 - https://gsa.zoomgov.com/rec/share/inuyu0qpAlOeV0rZO9AU8AK2uVj688NaFmDpJSpYw_bjr-Okw4mhoZxppQxcIStt.C1rcGVoYDvb64Z6n   Passcode: 5b=mSiK4

> **OASIS For Agency POCs** - 3/15/23 - https://www.youtube.com/watch?v=pB3nDdVKc-w&list=PLvdwyPgXnxxXtIR2l3cSAtkf9h32UI3r5&index=12&t=50s

> **Policy and Process Changes for Occupancy Agreements (OASIS Overview)** - 9/8/22 - https://www.youtube.com/watch?v=0K8wJB-2Cgg

Contact Us: **PBSOASIS@gsa.gov**

Client Enrichment Series – Q & A
Q&A Sections

Gaining Access to OASIS

Q. I need access to OASIS, can you provide me with the form?
A. Please note, before you can access OASIS, you need to establish a valid account on MAX.GOV. This process may take up to 2-3 weeks.

The PBS OASIS Customer Access Request Form can be found at this link - which is also listed on our OASIS website, https://www.gsa.gov/pbsoasis at the bottom of the page, under Policy and Process Changes for Occupancy Agreements.

https://www.gsa.gov/system/files/OASIS%20Customer%20Access%20Request%20Form.pdf

Q. How do we get onto Max.gov to get an account?
A. Go to the Max.gov site and follow the screens to establish an account. PBS OASIS team is not involved with Max.gov accounts. This is a completely separate government-wide process, out of the Office of Management and Budget.

Q. I established a MAX.GOV account and sent in my OASIS Access Request Form, what happens next ? How long does an OASIS access request typically take to process?

A. Since OASIS just went live on 8/22/23 and there is a current backlog, it could take 2-3 weeks.

Q. How do I know if I have been granted access? Did I maybe miss an email? What email address would it have come from?
A. The email for both approved and declined requests come from: <noreply@gsa.gov>. The email title will state, "OASIS Account Update for XYZ (Customer's first & last name)."

Q. I have OASIS access now - where do I go to log in?
A. Access OASIS at oasis.gsa.gov

Q. What happens when MAX.gov is retired 12/31/23?

Client Enrichment Series – Q & A

A. PBS OASIS team does not have that answer right now.

OASIS User Roles

Q. As my agency POC, how can I see which users were assigned accounts?

A. When you go into OASIS, click on the ordering official editor and you should get a list. Select the agency/AB code and it will bring up a list of your ordering officials.

Q. When will read-only users be created?

A. All users are created as ordering officials. Each customer agency decides whether to keep them as ordering officials or not. GSA can not remove that right. That's up to agencies to manage their own users. GSA is just creating the OASIS account. There are plans in the future to allow more read only access.

Q. Do employees that are not Ordering Officials have access to OASIS?
A. Customers request access to OASIS. Agencies decide ordering officials. You can have a read-only account. It just means once you're set-up in OASIS, your ordering official role must be removed by another of your agency's ordering officials.

Q. We have several OASIS users. Some are receiving email notifications, some are not. Some are showing the same number of OAs ready for approval, some have more or less. Why don't all officials receive the same notification and have the same list of OAs for approval?
A. This could be due to when the ordering officials received access. As soon as an ordering official receives access, they will start to receive notifications. If access is granted at different times, the notifications may not match. If an agency has multiple AB codes, only ordering officials assigned to the AB codes will receive the notifications.

Q. We have more than one ordering official. So what happens in that situation?
A. You can assign the OA to the ordering official that needs to approve.

Q. Can you assign a proxy to any task?
A. Technically, that is what you are doing when you assign the OA to someone. Once you accept it and review the OA, you can then assign/re-assign to someone else.

Q. How do you change or add Ordering Officials?
A. In OASIS, go to the Ordering Official Editor under your specific AB code and add/remove ordering officials. If you need this ordering official on previous OAs, you should then hit the "Push Changes to OAs" tab. If you don't do that, the ordering official will only have access to future OA approvals.

Q. Can other Agency POCs make updates to who should have access to the OASIS system?
A. Only agency POCs for a specific customer/AB Code can make changes to OASIS access for that customer/AB Code.You will be able to add/edit ordering officials. You can always contact us at PBSOASIS@gsa.gov to let us know of changes in Agency POC and we will update our records.

Client Enrichment Series – Q & A

Q. Currently we have multiple ordering officials and we all get the notification and required action. Is there a way for the OA to be reassigned to only one person so it gets removed from all others action ques?
- **A.** Currently, all ordering officials for the customer (under the specific AB code) will receive the OA notifications. However, the OA can be assigned/reassigned to the proper ordering official for approval.

Notifications, Approvals and Workflow

Q. Have all current OAs been uploaded to OASIS?
- **A.** Yes, all of the OAs should be present. If you're not seeing OAs for your agency, please let us know - email us at pbsoasis@gsa.gov.

Q. Why are we getting multiple notifications and actions for one single activity?
- **A.** Not sure. It could be a single action with multiple OAs. We definitely don't want to bombard people with excessive notifications. If this continues, please send a screenshot to pbsoasis@gsa.gov*.*

Q. Will GSA send us the final OA at the end of a project or just direct us to OASIS to find it and sign?
- **A.** You will not be requested to sign an OA, only to approve it in OASIS. No OAs shall be sent. Customer agencies can see/review/approve their OAs in OASIS.

Q. Will we receive an email when an OA is up for renewal? How will I be notified?
- **A.** If the renewal OA needs to be approved, you will receive a notification in OASIS. If the customer and GSA agree that the renewal option is available to take, you will receive an OA for approval through OASIS.

Q. Is there any way to delete or edit a submitted request?
- **A.** No. Once a request is submitted, you can not stop it in transit or delete it. You can submit a new request to clarify any changes you would have made on the initial request.

Q. If I clear notifications on my screen, does that clear notifications for all the other Ordering Officials in my agency?
- **A.** No.

Q. Do all space releases need to go through OASIS, or can we still use space.release@gsa.gov?
- **A.** All space releases are through OASIS now.

Q. What area of the tool deals with space releases?
- **A.** Go to submit a request, select lease or owned, then click "reduce space".

Client Enrichment Series – Q & A

Q. How will my release of space request be acknowledged, and how long will the process typically take?
    A. You can review all of your submitted requests (billing questions or reduce space) in OASIS. Once submitted, it will be in "In Progress Requests". You can see in OASIS if your request has been confirmed or not.You will receive a notification when GSA receives your request to reduce space and approves it. It should be within 10 business days.

Q. Are release of space requests only allowed from Ordering Officials?
    A. Yes.

Q. If we need to release, or add, parking or antennas, do we also do this through OASIS?
    A. Yes.

Q. How do I approve an OA in OASIS?
    A. From the OASIS home page, go to Action Items. Find the OA approval action item, Accept it (look for the checkbox), then you can review and approve it.

Q. How do I access the OA Comparison function?
    A. Click the Compare OA Versions link from your home page. Find your occupancy agreement by clicking the magnifying glass. It will bring up OAs in your organization. Select the OA you want to compare and then add the different versions of the OA in the Version 1 and Version 2 fields. You will be able to see the rent side by side to see the differences very quickly.

OASIS vs Legacy Systems (OA Tool, eOA) and Other Tools (ROW, CPAs, etc)

Q. If OASIS only has active OAs, how do you submit a request or billing question on an old OA?
    A. You will need to select "Any OA", then clarify in detail what you're asking about.

Q. Was all the data that was in the OA Tool migrated into OASIS?
    A. No, we did not migrate every piece of data.

Q. Can older OAs (different versions) be downloaded? for audit purposes?
    A. Not at this time. This may be a future enhancement of OASIS.

Q. Does OASIS replace Rent on the Web (ROW)?
    A. No. Rent on the Web is still available and can be accessed.

Q. What happens to Client Project Agreements (CPAs)? Are they outside of OASIS? How do I access them?
    A. CPAs are not in OASIS. CPAs are a separate planning document focusing on customer requirements.

Q. What is the synchronization between the CPA and the OA in OASIS?

A. There is no synchronization between the CPAs and OAs in OASIS.

Q. I assume that OASIS is not related to the Reimbursable Work Authorization (RWA) process, is that correct?

A. Yes, that is correct. You can learn more about RWA processes, and the eRETA system, at www.gsa.gov/rwa and www.gsa.gov/ereta. Past CES sessions on RWA processes policies and the eRETA tool are also available on the CES website, www.gsa.gov/ces.

Finance, Budgeting and Billing

Q. Is there a way for the agency to see the cumulative rent total for the annual rent per FY. We can only see annual amounts for each cost code?

A. The Rent on the Web (ROW) report and the payment schedule does provide the annual amount for individual OAs.

Q. If shell and operating costs can be shown for all OAs, that would be helpful market data.

A. Shell and operating costs are shown on the OA in OASIS. Refer to the Payments Tab.There is not currently a report listing this data for all of your OAs in one place.

Q. Has the PBS fee of 5 or 7% noted on the individual OA already been factored into the monthly/annual amounts noted on each individual OA?

A. No, the PBS fee is a separate billing line item.You can see it on the OA's Payments tab, Payments subtab (the middle of the screen).

Q. Where can we find descriptions of what each billing line is for...like 010 stands for... 030 stands for.... It has a brief name but where do we get details?

A. Codes for the billing line items - Go to OASIS User Guide for descriptions. Most of them correspond to the line on the bill.

Q. Is there any way to show the total rent costs for a month or a year on an OA under the payments -> payments. For example rather than shell rate, operating costs, etc. just a sum for the month?

A. Go to Payments Tab and download (export) to Excel. Also, the format for Rent on Web has not changed. It still shows monthly and annual rent.

Q. Can OA outyear financials be exported in excel?

A. OASIS is different, it shows full rate terms. As designed now, it does not export those out year financials into Excel. Hopefully, this can be a future report enhancement. In the Payments Tab, you can export all the billing months.

Client Enrichment Series – Q & A

Q. How do I submit a billing question? What is the expected timeframe for response?
    A. Go to OASIS, Submit Request feature. Once there, select billing question and you can add a sub-category (if you want). Provide as much detail as possible in the request. Once done, hit submit. Response time frames depend on the nature of the question.

Q. Are market rent appraisals stored outside of OASIS?
    A. Yes. However, for federal space, you will be able to see that the rates are approved by a Federal appraiser since they are coming directly from the appraisal.

Q. Will we be able to see the annual rent for each OA for the life of the term? Will it include inflation? We need a way to forecast rent into future years, in order to plan future budgets.
    A. OASIS does not include inflation/escalation factors. OA Tool functioned like that and there were positives and negatives to that. OASIS shows you the term the customer has and the rental rate. Customers will have to use their own forecasting tools for inflation, etc.

Q. Who sees my agency's Rent Est?
    A. Typically, Rent Estimates are created by the General Services Administration's (GSA) Public Buildings Service and the Office of the Chief Financial Officer (OCFO) and sent to agencies for their review so that they can prepare their budgets.

Q. If we need additional feedback on a Payment Type, do we just do a billing inquiry?
    A. Yes.

Q. Are there still financial pages or an equivalent?
    A. No. In OASIS, customers can see their rent/finances on the Payments Tab. Customers can also download a report of their rent payments. You can see the full OA if you hit Record for Approval.

Q. How do we budget for 5 years or 10 years out?
    A. You can use your rent estimates and use the payment tab in OASIS to see what the proposed rental rates are over the term of the OA.

Reporting / Downloading / Automating Functions

Q. What types of reports are available via OASIS?
    A. The expiring OA reports are on the Home Page under "Reminders." Customers can also filter and download their OA data. Reports will be enhanced in FY24 based on customer ordering officials' feedback.

Q. Is there a report that can be run to get all Billed OAs?
    A. Yes. Look at Active OAs, then type in "billing" in the GSA Status filter. Click the downward arrow icon to download a report to Excel.

Q. Will clients be able to use TRIRIGA's Reports Manager to develop reports that better suit agency needs than the ones you currently offer?

Client Enrichment Series – Q & A

A. OASIS reports will be considered for future OASIS enhancements. The OASIS team cannot speak to TRIRIGA's system.

Q. How can we generate a PDF copy or download an OA?
A. Go to the tab labeled, "Reports" to create a PDF or download the OA.

Q. Does the same go for lease amendments?
A. Lease Amendments are not available for current viewing. This is a future enhancement in FY24 or FY25. You can ask the GSA real estate representative for a copy.

Q. How will the Award OA be provided? Will it be the same format as before?
A. No. OAs in OASIS provide a 2-page OA Summary. If you want to see the full OA for review, click the "Record for Approval" button to see the full OA for review.

Q. Will we see an actual GSA Signature on the printed OA?
A. There is no longer an actual signature. The OA is approved in OASIS and you'll see that approval under the Notifications tab.

Q. Are there any discussions or plans to allow users to create their own reports in OASIS?
A. No, not at this time. The OASIS team needs to ensure OASIS is working correctly. This is not in our immediate plans, but may be considered in the future.

Q. Will reporting be available that shows an agency's full portfolio or will reporting be limited to individual OAs?
A. For now, reporting is limited to individual OAs.

Q. Does OASIS have any API architecture available so we can get data in an automated capacity?
A. Not at this time.

Q. I understand that OASIS is built on the IBM TRIRIGA platform - what version are you using?
A. Version 10.8.0

Q. Can we link our agency's TRIRIGA cloud system to OASIS?
A. Customers should contact TRIRIGA directly. The PBS OASIS team can provide the contact information.

Q. Can we use TRIRIGA's patch helper to update records in bulk via your technical team?
A. Customers need to contact TRIRIGA directly. The PBS OASIS team can provide the contact information.

Q. Does GSA have the ability to customize the application?
A. OASIS is a commercial off-the-shelf software system which we have configured and done minor customization to make it applicable to our needs. Customization is limited.

Q. Can we get outyear financials from OAs exported in Excel or other non PDF format?

Client Enrichment Series – Q & A

A. OASIS is different from our previous system, it shows full rate terms. As designed now, it does not export those out year financials into Excel. Hopefully, this can be a future report enhancement. In the Payments Tab, you can export all the billing months.

Q. Is there a way that we can sort OAs by region?
A. Yes. You can filter the data and use the customer identifier fields to sort by Regions.

Plans, Drawings and Maps

Q. Have all current floorplan drawings been uploaded to OASIS?
A. Yes. All current floorplan drawings have been uploaded. If you're not seeing the drawings for your agency, please let us know - email us at pbsoasis@gsa.gov.

Q. When will we see the space assignment drawings shown associated with each OA?
A. This was not completed prior to OASIS go-live date, but the drawings continue to be uploaded.

Q. What is the plan to update moving forward? Will it happen ad-hoc as changes to new floor plans are available? Or periodic updates?

A. It will be periodic because of the type of changes that are made to these drawings on a given time, so that will not be in real time to see the following day.

Q. Where exactly can we locate drawings, plans and maps within OASIS?
A. Once uploaded, you can find them in the individual OA's "Notes & Documents" tab.

OASIS Training and Support

Q. Where can I find the OASIS Customer User Guide?
A. You can find the OASIS Customer User Guide at this link - https://www.gsa.gov/system/files/GSA%20Customer%20User%20Guide.pdf. It is also posted on our PBS OASIS webpage - https://gsa.gov/pbsoasis

Q. Where can I find the OASIS video tutorials?
A. You can access several short video tutorials on our OASIS Training YouTube Playlist https://www.youtube.com/playlist?list=PLvdwyPgXnxxX83cZ_0IKoqI46YABS-B2y This link is also posted on our PBS OASIS webpage - https://gsa.gov/pbsoasis

Q. If I have questions about OASIS, or need support, how can I contact your team?
A. You can email us at pbsoasis@gsa.gov. If you are experiencing an issue in the system - it would be helpful for you to include a screenshot to illustrate your point.

Q. Within the OASIS tool, is there a searchable help or operating document?

A. In OASIS, you can always use the filters to narrow your search. Outside of OASIS, there is the OASIS customer user guide - https://www.gsa.gov/system/files/GSA%20Customer%20User%20Guide.pdf

All Other

Q. Does "Commencement Date" in OASIS mean the date the lease was awarded, when the OA was created or when the Government actually commenced the lease?

A. None of these. It's the last day the OA was updated, (probably when you approved it). It is the effective date of the current OA version.

Q. With commencement dates reflecting version, will OAs still retain the original lease start date in some way?

A. Customers will have a complete record of when the OA started. You will be able to see each subsequent version. OASIS does not have historical information there.

Q. Where can we find the actual start (BOD) date for an OA?

A. For a brand new OA, the commencement date is the start date. As the OA is revised with billing related changes, that date changes as an OA version is created and updated. This is what occurred in the OA tool. On the history tab of the OA, older OA versions can be found, which include the commencement date of that version. For migrated OAs, OASIS uses the last effective date that was displayed in the OA tool, which may not be the actual start date of the OA. Rent on the Wed (ROW) is an alternative method to check an OAs estimated start date/original billing period.

Q. Our agency has agency-specific clauses in our OAs. If clauses will be in the Pricing Desk Guide (PDG) v6.0 now, how will the agency-specific clauses be handled? Still in the Award / final OAs?

A. There are very limited ad hoc clauses (about 9 clauses). There are no agency-specific clauses.

Q. For current occupancies, are agency-specific ad hoc clauses grandfathered in? We want to make sure that previous ad hoc clauses that were approved are not eliminated.

A. Ad Hoc clauses are not being grandfathered into OAs in OASIS.

Q. Will Ad-Hoc clauses be used?

A. We are no longer using ad hoc clauses. Clauses are vastly limited in accordance with updated Pricing Policy.

Q. When will the PDG v6.0 be released?

A. There is no date yet for PDG release.

Q. What can the Customer Identifier fields be used for?

A. Customer agencies can use these fields as they see fit (eg. add POCs, accounting codes, etc.) The fields can be populated with texts or numbers. Once entered, the customer can use sort to find OAs.

Q. Do you have to re-enter the Customer Identifiers for each approval? Can they be filled in in bulk vs one by one?

A. They can not be filled in by bulk. Customer agencies can only fill the identifiers when approving an OA.

Q. Can OASIS archive intra agency memos that impact legacy OAs?

A. OASIS is not a document storage repository. If there are requests or actions where a historical document is relevant to OA approval, it would be included.

Q. Can you please explain the gap between USF and payment schedule USF again, and why there is a difference?

A. The location tab is showing you the measurement. This may show a different square footage than what is in your financial information on the Payment Tab. What appears in the payment schedule is what you are obligated to pay. You may also notice some rounding differences because we're going to a two decimal rounding system (as compared to 9 in the OA Tool).

Q. Is there a way to prioritize submitted access for component lease administrators?
A. Component system has not been updated since decommissioning of eOA.

Q. Will the monthly portfolio summary reflect or draw from OASIS.

A. The month of August portfolio does not show the current version numbers/modification numbers since all OAs now start with a 300 series number, and when a modification takes place it will then reflect 301, 302, etc... the current portfolio does not reflect this currently.