



## PBS OASIS – Q & A

**Topic: PBS OASIS - New Customer Workflow Approval**

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**Dates of Presentations: June 13 & 18, 2024**

### OASIS Related Resources

- [New Customer Workflow Session Recording](#) and passcode: DW+6\*Sjn
- **PBS OASIS Website** - [www.gsa.gov/pbsoasis](http://www.gsa.gov/pbsoasis)
- **Email** - [pbsoasis@gsa.gov](mailto:pbsoasis@gsa.gov)
- **Access Request Form** - [Application Form](#)
  - **Account Inquiries** - [pbsoasisaccounts@gsa.gov](mailto:pbsoasisaccounts@gsa.gov)
- [National Business Space Assignment Policy \(NBSAP\)](#)

### Q&A Section Bookmarks

<a href="#">Access, Accounts and User Roles</a>	<a href="#">Enhancement Suggestions</a>	<a href="#">Space and Square Footage</a>
<a href="#">Billing and Rent</a>	<a href="#">OA Approval Process</a>	<a href="#">Training and Support</a>
<a href="#">Email Notifications</a>	<a href="#">Reporting</a>	

### Access, Accounts, and User Roles

Q. With the reconfiguration of the workflow now in effect, do we have to re-register for OASIS access?

A. No, if you had an account prior to the reconfiguration that account stayed as is. If your account has gone inactive, though, because you did not log on within 90 days you will need to send an email to the PBS OASIS accounts to have that reactivated.

Q. Can everyone with access to a specific AB number see all the OAs for the AB number?

A. Yes.

Q. Will we receive a notice as we approach the end of 90 days (prior to account deactivation?)



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A. No. As a best practice, we recommend that you set a calendar reminder for yourself for every 80 days to log into the system.

Q. How can we tell if our role (Ordering Official or Non-Approver) was changed by CIAO? Will we receive an email or system notification?

A. The changes made with the reconfiguration were added as a mass data change and did not produce individual email notifications. The fastest way to check your account is to log into OASIS, open an OA Needing Approval, and see if you have the Accept button at the top of the form. You can also email [pbsoasis@gsa.gov](mailto:pbsoasis@gsa.gov) and request us to verify which account you have.

Q. Can we see the list of everyone in my agency who has an OASIS account and what their roles are?

A. The query Active Users in My Organization query on your Portal shows all of the Active users for your AB Code, however, it does not show you the role that they hold. This is a good tool to use to manage access requests for users whose accounts have gone dormant for 90 days and need to have their accounts reactivated.

Q. If we had approver access previously as an Ordering Official, do we automatically have access now as a Non-Approver?

A. If you were previously an Ordering official, and your agency kept you as an ordering official. You have the maximum rights and can do everything in the system.

If your agency asked to move you to a Non-Approver role, you will still have access to all of those OAs and be able to view them, request clarification, submit questions. The only action you would not be able to do is approve or reject an OA review..

Q. What's the process to change a user role from non-approver to ordering official if it's needed?

A. To change your role, use the User Access Form found on [www.gsa.gov/pbsoasis](http://www.gsa.gov/pbsoasis), and have the Supervisor and CIAO signature and then send that into [pbsoasisaccounts@gsa.gov](mailto:pbsoasisaccounts@gsa.gov)

Q. How does an OA get terminated in OASIS, and who can terminate it?

A. OA's terminate because they either expire or because agency's submit a release of space request. All customers have the ability to submit a Release of Space request from the portal page, both Non-Approvers and Ordering Officials.

Q. I am having trouble accessing OASIS. My regular browser is Microsoft Edge. Do I need to use Google Chrome for OASIS?

A. Google Chrome is the preferred browser for PBS OASIS. Be sure to turn off any pop-up blockers in your browser so that you can view all of the system fields and options.

Q. Can Non-Approvers submit a release of space?



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A. Yes, Non-Approvers can do anything an Ordering Official can, except Approve or Reject an OA, so they can submit release of space requests.

Q. Will we receive an email when we are close to becoming inactive (no log-ins for 90 days)?

A. No. As a best practice, we recommend that you set a calendar reminder for every 80 days for yourself to log into the system.

Q. Will there be a "Read Only" role? The New Non-Approver role does not work for my agency.

A. The Non-Approver and the Ordering Official are our only 2 customer roles in the system. We will note that anytime a user takes an action inside PBS OASIS, it is logged and we would have a record of that. So if you are worried that maybe one of your Non-Approvers would submit a Release of Space that shouldn't have been sent, you would have a record of it, so you could follow up and correct that errant request. It's not something that you could accidentally do as it does take a little bit of initiative to release that space.

Q. As a CIAO, or Ordering Official, can I "assign" or place the name of the actual Ordering Official on an OA that is pending?

A. Yes! From the OA's Needing Approval list, there is a column for Reviewer. This box is for you as a customer user, to enter information that would assist in your agency's internal review.

### Billing and Rent

Q. Are Current and Prior Year Adjustment details available for viewing in OASIS?

A. Yes, all adjustments on your bills August 2023 and later are in OASIS. Adjustments done prior to August 2023 are not available.

### Email Notifications

Q. Prior to the reconfiguration, there was a notifications area showing OAs that may have changed in version number due to an administrative update . Will an agency still get these notifications ?

A. No, those notifications are no longer created.

Q. If comments or changes are needed, do we have the ability to annotate this back to the Realty Specialist without approval or rejection?

A. Our new "Request Clarification" module will allow you to do just that! See this covered in our training video - "How to Approve an OA". On the approval form, scroll down to the request, clarification section, click, Add to enter a new question, and a pop-up opens.



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Q. In the prior configuration, I would receive the actual OA in pdf for review, now I receive a link to access OASIS to review the OA?

A. Yes, the pdf of the OA is now inside OASIS. We put this version control feature in place to ensure that you would always have access to the most current version of the document to review in the event the OA is rejected and a new version sent.

Q. After utilizing the request for clarification and an OA is updated accordingly, will OASIS automatically reject and file the now old OA and produce an updated OA?

A. It's a little more nuanced. The OA will not automatically reject, but GSA is able to reject it, correct it, and resend it manually if a correction is needed.

Q. When we turn back space, either at expiration or through a release of space request, what sort of notification will we receive ?

A. GSA is working to improve and clarify the Release of Space notifications. That update will debut in Fall of 2024.

Q. We previously received notifications about OA's receiving a new version/ revision, but I don't see the tab anymore. Is there a new location for such information?

A. No, these notifications are no longer generated.

Q. Can Non-Approvers submit comments on an OA?

A. Yes! Using that internal note feature (see training video "How to Approve an OA"), you are able to add any of those internal notes that you want as a Non-Approver, or request clarification.

Q. If, as an Ordering Official, you accept the OA as yours and you then Request Clarification or Reject the OA, will communications on this OA still be sent to all Ordering Officials or just the Ordering Official that accepted the OA?

A. This is a little bit different in this new reconfiguration approach, in that you don't accept the OA. If you ask for a clarification, everyone will receive the notification email and will be able to review the OA and clarification.

Q. Is there an email notification sent if another user updates a previous request clarification with additional details/notes?

A. No. Once the request is pending with GSA, you do not receive any notification until it comes back from GSA.

Q. Will GSA resume sending notifications with the PDF "Snap Shot" OA? That has been discontinued, and presents a significant challenge for SSA.



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A. No, the pdf of the OA is now inside OASIS. We put this version control feature in place to ensure that you would always have access to the most current version of the document to review in the event the OA is rejected and a new version sent.

Q. Do questions to GSA and comments internal to the agency as part of the review within the system become part of the record within TRIRIGA or will they disappear after an OA is approved/signed?

A. Yes. They become part of that approval record sheet, and you are able to view them in the Approval Form linked in the OA record and in the All Customer Review query.

Q. What is the email address the notifications are coming from - I need to work with my IT office to get it "whitelisted" as I continue to not receive emails.

A. The email will come from: [notifications@oasis.gsa.gov](mailto:notifications@oasis.gsa.gov)

Q. Will Non-Approvers receive the same notification emails as the Ordering Officials?

A. No, at this time Non-Approvers cannot receive the email notifications because they are not contacts of the OA record. That is something that we are looking into and evaluating as a future enhancement.

### Enhancement Suggestions

Q. Who can agencies contact to provide input or suggestions for our use of OASIS so the tool is more useful to agencies? Or how can we join GSA's focus or beta testing groups?

A. Send your suggestions or volunteer via [pbsoasis@gsa.gov](mailto:pbsoasis@gsa.gov).

Q. Is there a way GSA can provide the PBS fee calculated rather than just the percentage? While the breakdown of the OA Summary is nice, a grand total would be very useful for the agency.

A. Each rate has a separate effective and expiration date. The PBS fee is a percentage of that month's rent and changes each time a new rate is added or expires making it impossible to show one annual amount.

Q. Can I add columns to the table? A lot of our data calls by the department ask for lease start/end date - it would be so much easier if those could be added and exported to Excel. Currently, I have to open each OA to get the info. Ability to customize all columns would be of great value.

A. If you have enhancements where you would like additional information to display inside the queries, you can email those suggestions to the [pbsoasis@gsa.gov](mailto:pbsoasis@gsa.gov).

Q. Is it possible to batch order OAs in a spreadsheet, and not one at a time, with all the relevant information?

A. No, unfortunately that is not a feature.



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### OA Approval Process

Q. When Viewing a list of OAs to approve, can you rearrange the columns and save that order for future use?

A. You can rearrange them by clicking on the columns and dragging it where you would like to place. It will not save though and each time that you go out of the system it will return to the default system standard.

Q. Can OASIS users customize their view portal to only see the OAs they are responsible for (ie States assigned to them) and not the entire agency list of OAs?

A. No, the queue of pending OA's is based on your AB Code and cannot be further segmented. You can search that portal for certain GSA Regions or for states to narrow your view. Please keep in mind, if you reject an OA you see in the queue because it is not yours to review, you are rejecting it on behalf of your entire agency and removing it from everyone's queues.

Q. How do I navigate to the OA Summary page?

A. If you're looking for your OAs summary document, you can access it either from the OA Record or, if it's one you previously approved, you can find it on the "All Customer Reviews" query.

Q. After we release space in a building, do we receive a new OA that needs to be signed?

A. If it was a simple release, no, you would not get a new OA for approval. However, if you had to do some reconfiguration and spent tenant improvements for the relocation of space, or if you are relocating to new space, you would be asked to sign a new OA.

Q. If an OA has more than one "Work in Progress" OA, should the customer sign them all or just the most recent one?

A. In general, there should only be one version in place at a time. That version may contain both billing and proposed pending changes. The payment effective dates and expiration date along with the payment schedule status differentiate the billing and proposed. We will only have one OA version with you at a time.

Q. Did all OAs Revision Number get reset to start at '300'. Does any/all types of changes on the OA cause the Revision Number to increment?

A. All migrated Billing OAs have a revision number of 300. OAs that had not billed before have a revision number of 0.



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All changes that alter the terms and conditions of the OA will generate a new amendment number.

Q. Can a request be canceled?

A. No, a release of space cannot be canceled. You can Submit a Billing Question to alert the region that you no longer wish to release space and they can deny the request.

### Reporting

Q. Will there be downloadable full Occupancy Agreement documents? Can I select multiple OAs to download at once, or must they be done one at a time?

A. The OA Summary Report pdf is the full Occupancy Agreement document. You can download that from the Approval Record or from the OA Record. You can download queries with multiple OAs' information by selecting them in the search and exporting, but you can only download one OA Summary Report pdf at a time.

Q. Is there anywhere in OASIS to run reports, such as what our agencies total rent costs are this fiscal year and what they are projected to be for the next fiscal year and on? If these reports are not available in OASIS, where would we find them?

A. With all of our queries you do have the ability to export data (see video - [Working with Queries](#)), but these do not include payment information.

A separate team is working on agency reporting features, and they will be offering a Client Enrichment Series session - [PBS Customer Dashboard - Reporting Made Easy](#), on July 11, 2024 from 1pm- 2pm EDT to show customers how to access our dashboard tools for information on your Projects, Occupancies, RWAs, Locations and Rent.

### Space and Square Footage

Q. Earlier it was mentioned, Scenario Plans is where my agency can review floor plans. Will the floor plan documentation be available in AutoCAD or Autodesk view?

A. The assignment drawings are in pdf format.

Q. There have been issues where the rentable square feet in the OAs do not match what's in Rent on the Web (ROW) tool. Has this issue been brought to the OASIS team's attention?

A. The OASIS record has square footage in 2 separate tabs. One is the Location tab, and one is the Payment tab. The Payment tab is the amount that appears on your Rent on the Web bill. ROW will show one line for each payment type. If OASIS has multiple blocks of space, they will sum into one line and you may see very minor (less than 2 sqft) of variance from





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this summing. If you have instances where that doesn't happen, please send those to the [pbsoasis@gsa.gov](mailto:pbsoasis@gsa.gov), and we can dig into those.

The other tab on the OA is the Location tab. The Location tab shows your measured, assigned square footage, and there are cases, for very valid reasons, where that would not be the same as your billed square foot. One of the prime ones is remeasurement. When an agency first moves in the space is measured and the bill is based on that amount. We do not alter that if we find minor changes to measurement guidelines. The Locations tab would reflect that change but would not carry through to the Payment tab. This is the primary source of variance between square footage.

Q. Why would our R/U (rentable/usable) factor have gone up in OASIS vs the old OA?

A. Starting in FY24, three different events contributed to variances in the RU factor calculated in OAs. The first was converting to a two decimal RU factor (from systems that use as many as nine decimal places), so there were some slight rounding changes.

The second thing that we did in October of 2023 was convert joint use away from a separate charged line into part of the building common space. When that occurred the R/U factor increased to reflect the new space in rentable while removing it as a separate change.

Then we had a third event - PBS had not done a systemic update of our RU factors in several years. In October, with the transition and the joint use change, we did align our RU factors again. So if your R/U factor had gotten misaligned in the previous years you would have seen a correction that occurred in October to bring it back into line.

Q. Do I need to submit a space release request in OASIS to update the AB Codes for my agency (not to return space to GSA)?

A. No, policy would not require a Release. This is a unique situation for the few customers that have multiple AB Codes. Submit a Billing question through OASIS to your Regional OA Editors. The OA will be sunset and a new OA created.

Q. Is there a way to edit a Release of Space request? Or add space drawings to the original request, when needed by GSA?

A. Currently no. We are reviewing the process this fall and may make minor changes to the process.

## Training and Support

Q. I understand that I am approved of OASIS but I have not seen any link or email that gives me guidance on how to access the site. How will I be notified when I can start using the tool, and where to begin?





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A. Access the system through [oasis.gsa.gov](https://oasis.gsa.gov). All active users can access the site at this time.

You also have access to all the training material on our site, including site access and basic navigation which are part of our updated [PBS OASIS Customer User Guide \[PDF - 2 MB\]](#) (Updated June 10, 2024). You can find this guide and all our training videos on our PBS OASIS website [www.gsa.gov/pbsoasis](https://www.gsa.gov/pbsoasis)

Q. Have the OASIS training videos been updated to reflect all of the June 2024 changes to the new workflow?

A. All our OASIS training videos listed below are available on [www.gsa.gov/pbsoasis](https://www.gsa.gov/pbsoasis). Videos marked as “NEW” have been updated to reflect the new customer approval workflow and portal effective June 10, 2024. All other videos remain accurate, but were developed prior to the new workflow and portal

[OASIS Overview & Related Pricing Policy Changes](#)

NEW - [Customer Portal Overview](#)

[Occupancy Agreements in OASIS for Customers](#)

NEW - [Working with Queries](#)

[Release of Space](#)

[Scenario Plans in OASIS](#)

NEW - [Compare OA Versions](#)

[Joint Use Space Fact Sheet \[PDF - 87 KB\]](#)

NEW - [Submit a Billing Question](#)

NEW - [How to Approve or Reject OAs Part 1 \(OA Approval Form Overview\)](#)

NEW - [How to Approve or Reject OAs Part 2 \(Approve, Reject or Clarify an OA \(OA Approval Form\)\)](#)