



GSA Customer User Guide



PBS Occupancy Agreement & Space Inventory System
Version 2.0 – June, 2024

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1. OASIS User Role and Customer Portal

OASIS is GSA's Occupancy Agreement and Space Inventory System. It replaces GSA's legacy OA and drawing systems, as well as eOA, the system many customers used to view billing OAs. OASIS provides an integrated, trackable, and accessible process for GSA and customer agencies to manage OAs, process releases of space, and access real time occupancy and rent data.

OASIS provides customers the ability to view and download rent data, view the modification history of OAs, submit questions to GSA about rent bills, and is the official process for submitting all release of space requests. OASIS also provides the ability to track the approval and timeline of the release of space request.

This chapter will provide an overview of the customer roles, obtaining access to OASIS, and navigating the Customer Portal.

Customer Roles

OASIS has two customer user roles:

1. **Ordering Official-** Can approve and reject OAs sent for customer review. Can review all OA data in the system, submit a release of space, and submit a billing question.
2. **Non- Approver-** Can review all OA data in the system, submit a release of space, and submit a billing question.

Obtaining an OASIS User Role

1. Ensure you have a Max.gov account

If you do not have a max.gov account, please visit max.gov and work with the support team at MAXSupport@max.gov or 202-395-6860 to obtain an account. GSA is transitioning from max.gov to login.gov during FY2024.

2. Request a User Account from pbsoasisaccounts@gsa.gov

- a. Navigate to GSA's external OASIS site at gsa.gov/pbsOASIS
- b. Locate the OASIS Customer Access Request Form (pdf) near the top of the site.

- c. Email pbsoasisaccounts@gsa.gov, provide your requested A/B Codes and request the name of your Customer Internal Approving Official (CIAO). This is the individual designated by your agency to grant OASIS roles.
 - i. The CIAO is the individual at your agency designated to approve OASIS roles. Both they and your supervisor's signature are required on the form.
- d. Complete the Form, ensuring you input your agency name(s) and all AB Code(s) that you require.
- e. Check the box indicating whether you are requesting the Ordering Official or Non-Approver Role.
- f. Obtain Supervisor and CIAO approval on the pdf
- g. Send completed form to [_pbsoasisaccounts@gsa.gov](mailto:pbsoasisaccounts@gsa.gov)
- h. You will receive an email in approximately 5 business days granting access to the system
- i. Open OASIS at oasis.gsa.gov

GSA requires you log in to the system every 90 days. After 90 days of inactivity your account will be deactivated. You must email pbsoasisaccounts@gsa.gov to request reactivation.



Set a calendar reminder every 80 days to open OASIS and navigate to an OA establishing your login and avoiding deactivation.

[Before you access OASIS](#)



- Note that Google Chrome is the preferred browser.

Turn off any popup blockers; OASIS relies on popups. If you click something and it seems like nothing has happened, you may have a popup blocker. Depending on your agency's policies, you may need to consult with your IT department, but see tips below:

 - [Click here for instructions to allow OASIS popups in Google Chrome.](#)
 - [Click here to learn how to manage popups in Microsoft Edge.](#)
 - [Click here to learn how to allow OASIS popups in Firefox Mozilla.](#)
- OASIS logs you out after 15 minutes of inactivity. If you navigate back to OASIS after a period of inactivity and the system doesn't respond, refresh the page. OASIS reroutes you to the **Login Screen**.

[OASIS Customer Portal Page:](#)

Once logged in to OASIS you will land on the OASIS Customer Portal Page. The Portal is divided into several sections:

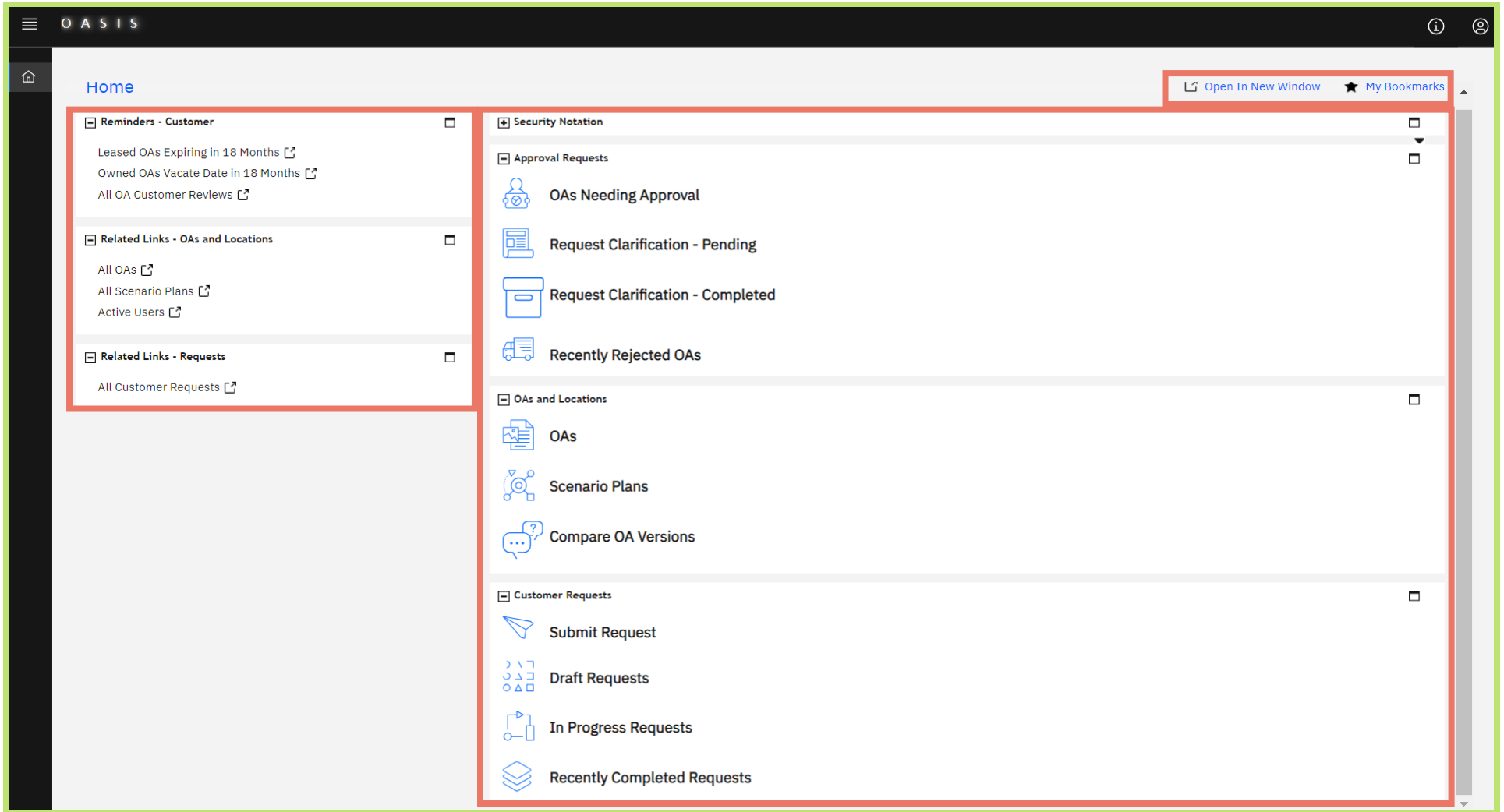


Figure 1. Customer Portal

Center Menu

1. **Security Notification** – the required notice regarding use of a Federal Government computer system
2. **Approval Requests**- this section is for OAs submitted for customer approval (see Chapter 3 for more information on these sections)
 - **OAs Needing Approval** This is a list of all the OAs with your agency that require your immediate review. OAs on this list will be in a Review In Progress stage and will remain on the list until they are approved or rejected.
Please note timely approval is needed to ensure projects stay on schedule and contract bids don't expire.
 - **Request Clarification- Pending** This is a list of all the request clarifications you have sent to GSA that are still under review. OAs will remain on this list until GSA finishes their research and provides a response.
 - **Request Clarification- Completed** This is a list of all request clarifications that have gone to GSA and received a response. You can open this query, search on your OA, and quickly read GSA's answer.
 - **Recently Rejected OAs** This is a list of all OAs that were rejected by your agency in the last 30 days. This will also include any OAs that GSA cancelled and removed from your approval queue.
3. **OAs and Locations** (See Chapters 2, 6, & 7 for more information on these sections)
 - **OAs** – all your agency's active occupancy agreements; from here, access individual OA records or filter, sort, and download the entire set of OAs. When this query is opened the heading displays, Active OAs In My Organization.
 - **Scenario Plans** – links to all your agency's scenario plans, which are options for future space in new or existing OAs.
 - **Compare OA Versions** – displays two versions of the same OA so you can quickly see the differences.
4. **Customer Requests** (See Chapters 4 & 5 for more information on this section)
 - **Submit Request** – area to submit a billing question or a request to release space.
 - **Draft Requests** – questions or release requests that your agency started but hasn't yet submitted to GSA.
 - **In Progress Requests** – questions and release requests that your agency submitted to GSA that have not yet been completed.
 - **Recently Completed Requests**- a quick query for recently completed questions and releases of space.

Left Menu:

5. Reminders – Customer

- **Leased OAs Expiring in 18 Months** – a list of your agency’s leased OAs that have an expiration date in the next 18 months.
- **Owned OAs Vacate Date in 18 Months** – a list of your agency’s owned OAs for which you have an active release of space request with an expected vacate date in the next 18 months.
- **All OA Customer Reviews**- a list of all OA approval requests (starting June 2024)

6. Related Links – OAs and Locations

- **All OAs** – all OAs for your agency in any status, including billing, pending, and completed (closed); note, this list does not include OAs that closed prior to OASIS.
- **All Scenario Plans** – all scenario plans for your agency; scenario plans are options for future space in new or existing OAs.
- **Active Users**- a list of all users for your AB Code,

7. Related Links – Requests

- **All Customer Requests** – all requests your agency has submitted to PBS in any status, including completed, canceled, and in-progress requests; requests include billing questions and requests to release space.

Top Menu:

- 8. **Open in New Window** – pops out the current screen into its own window.
- 9. **My Bookmarks** – bookmarks allow you to tag specific OAs or forms for future reference and quick access.

[Viewing and Customizing Queries](#)

Clicking on any of those entries on the Portal will take you to a specific query that provides information on that subject. OASIS queries all operate in the same way, providing options to sort, filter, and download the results. This section gives examples of how to use these features.

Home / [Active OAs In My Organization](#) [Open In New Window](#) [Add to Bookmarks](#) [My Bookmarks](#)

Active OAs In My Organization [Apply Filters](#) [Clear Filters](#) [Refresh](#) [Download](#) [Settings](#)

Location ID	City	StateProv	OA Type	OA Number	GSA Status	AB Code	Customer Identifier 1
AK0005	KETCHIKAN	ALASKA	Owned	AAK00744	Billing	4766	
AK0035	ANCHORAGE	ALASKA	Owned	AAK00842	Billing	4766	
AK0001	ANCHORAGE	ALASKA	Owned	AAK03333	Billing	4766	
AK0031	ANCHORAGE	ALASKA	Owned	AAK03334	Billing	4766	
AK0013	JUNEAU	ALASKA	Owned	AAK03722	Revision In Progress	4766	
AK0029	FAIRBANKS	ALASKA	Owned	AAK03964	Billing	4766	
AK0031	ANCHORAGE	ALASKA	Owned	AAK04173	Billing	4766	
AL0011	BIRMINGHAM	ALABAMA	Owned	AAL01543	Billing	4766	
AL0077	MOBILE	ALABAMA	Owned	AAL02087	Billing	4766	
AL0003	MONTGOMERY	ALABAMA	Owned	AAL02173	Billing OA Under Revision	4766	
AL0039	MOBILE	ALABAMA	Owned	AAL02553	Billing	4766	
AL0008	ANNISTON	ALABAMA	Owned	AAL02631	Billing	4766	
AL0010	TUSCALOOSA	ALABAMA	Owned	AAL02649	Billing	4766	
AL0007	MOBILE	ALABAMA	Owned	AAL02673	Billing	4766	
AL0010	TUSCALOOSA	ALABAMA	Owned	AAL02721	Billing	4766	

Items per page: 50 1 - 50 of 475 items 1 of 10 pages

Figure 2. Active OAs List

1. Filtering:

To narrow the list to those with specific characteristics, type the desired values into the fields at the top of each column, then click enter or **Apply Filter** in the top right. For example, to see all the leased OAs for your organization, you would simply type “leased” at the top of the **OA Type** column. You can enter more than one filter at a time. Click **Clear Filters** to remove the filters and display the full list of all active OAs.

OASIS displays the maximum number of results in the list at the bottom left. Use the drop down to change the number of items displayed per page. Use the arrows at the bottom right to scroll through the pages of the list.

2. Sorting:

Arrange the data in a different order by clicking the column title of the column you want to sort by. An arrow appears indicating the sort direction (see **OA Number** column).

3. Rearrange Columns:

Move columns to arrange them in a way that better serves your information needs such as moving the lease number to after the OA number. Move the columns by dragging and dropping the column headings. The new order will NOT be permanent and will revert to the original once you close the list. If you accidentally remove a column, you can get it back by exiting the query and reopening it.

4. Open the Record:

Click anywhere on the line to open the individual record (See Chapter 2 - Viewing Occupancy Agreement Records).

Home / All OAs In My Organization

Open In New Window Add to Bookmarks My Bookmarks

All OAs In My Organization Apply Filters Clear Filters

Location ID	City	StateProv	OA Type	OA Number	GSA Status	AB Code	Customer Identifier 1
Contains	Contains	Contains	Contains	aca13303	Contains	Contains	Contains
^ CA6330	SAN FRANCISCO	CALIFORNIA	Leased	ACA13303	Customer Approved	4766	Surf Shop

Document Name	Document Number	Document Status	Revision	Created Date/Time	File Name
Post-Approval OA - ACA133...		Work In Progress	0.0	05/28/2024 12:03:35	Post-Approval OA - ACA13303 - 0 - 05/28/2024 1603.pdf
Pre-Approval OA - ACA133...		Work In Progress	0.0	05/28/2024 11:58:48	Pre-Approval OA - ACA13303 - 0 - 05/28/2024 1558.pdf
Pre-Approval OA - ACA133...		Work In Progress	0.0	05/28/2024 11:42:52	Pre-Approval OA - ACA13303 - 0 - 05/28/2024 1542.pdf

Figure 3. Active OA List, Filtered and Sorted

5. Open Associated Documents:

View documents added to the OA record by clicking the caret to the left of the Location ID and clicking the new row to open the document.

6. Export the Query Data:

You can export the information into an excel document to manipulate it and run analysis on your information as needed. Click the download icon in the upper right of the query list.

7. Remove Columns

If you'd like to hide certain columns you can remove them from the list for easier viewing. This is not a permanent change, and the columns will reappear will you exit and reopen the query. Click the hamburger menu at the top of the column, then clicking the grid. Uncheck the columns in the popup to remove them from the list. Note: the hamburger menu does not appear until you click the column name.

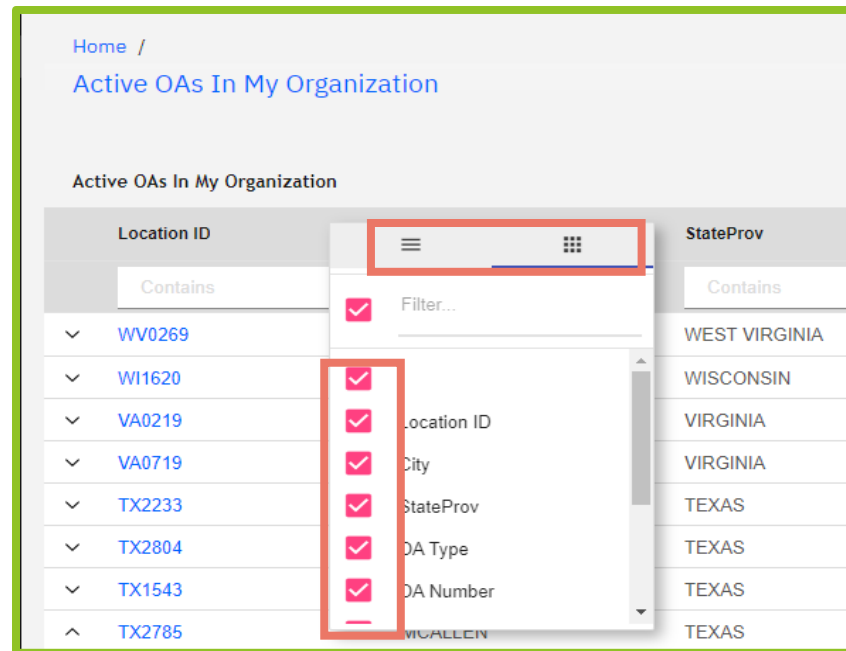


Figure 4. Remove Columns Menu

2: Viewing Occupancy Agreement Records

An occupancy agreement, or OA, is an interagency agreement, memorializing the rent between GSA and its customers. When PBS is awarding a lease or construction contract, the OA obligates our customers to fund current year rent and commits them to request funds for rent in future years.

The OA Record in OASIS forms the basis of the OA Summary Report and the Rent Bill viewed in Rent on the Web (ROW). Customer users have access to the OA Record and can view all the data fields that GSA uses to create the OA Summary and the Rent Bill. OASIS keeps the complete OA lifecycle including OA approvals (See Chapter 3 for more information) and any amendments or modifications to the OA over time.

OASIS can be used by the customer to research billing information, respond to internal audits, or to print and save the OA Summary document. Please note GSA will not print or email copies of the OA outside of OASIS. If customer users without an OASIS role need access to this information, they will be directed to their agency's Ordering Officials and Non-Approvers for assistance.

This chapter covers the navigation of the OA Record. Please see Chapter 3 for information on Approving OAs and Appendix B for information on the OA Summary report.

[View OA Details](#)

1. From the **Customer Portal**, your agency's OAs are accessible from two links. The **OAs and Locations** section links to active OAs. If you want to see all OAs for your agency, including historical OAs that have closed, click the **All OAs** link on the left menu in the **Related Links – OAs and Locations** section.

Note that historical OAs only include OAs that migrated to OASIS, not any OAs that closed before the OASIS Go Live in August, 2023.

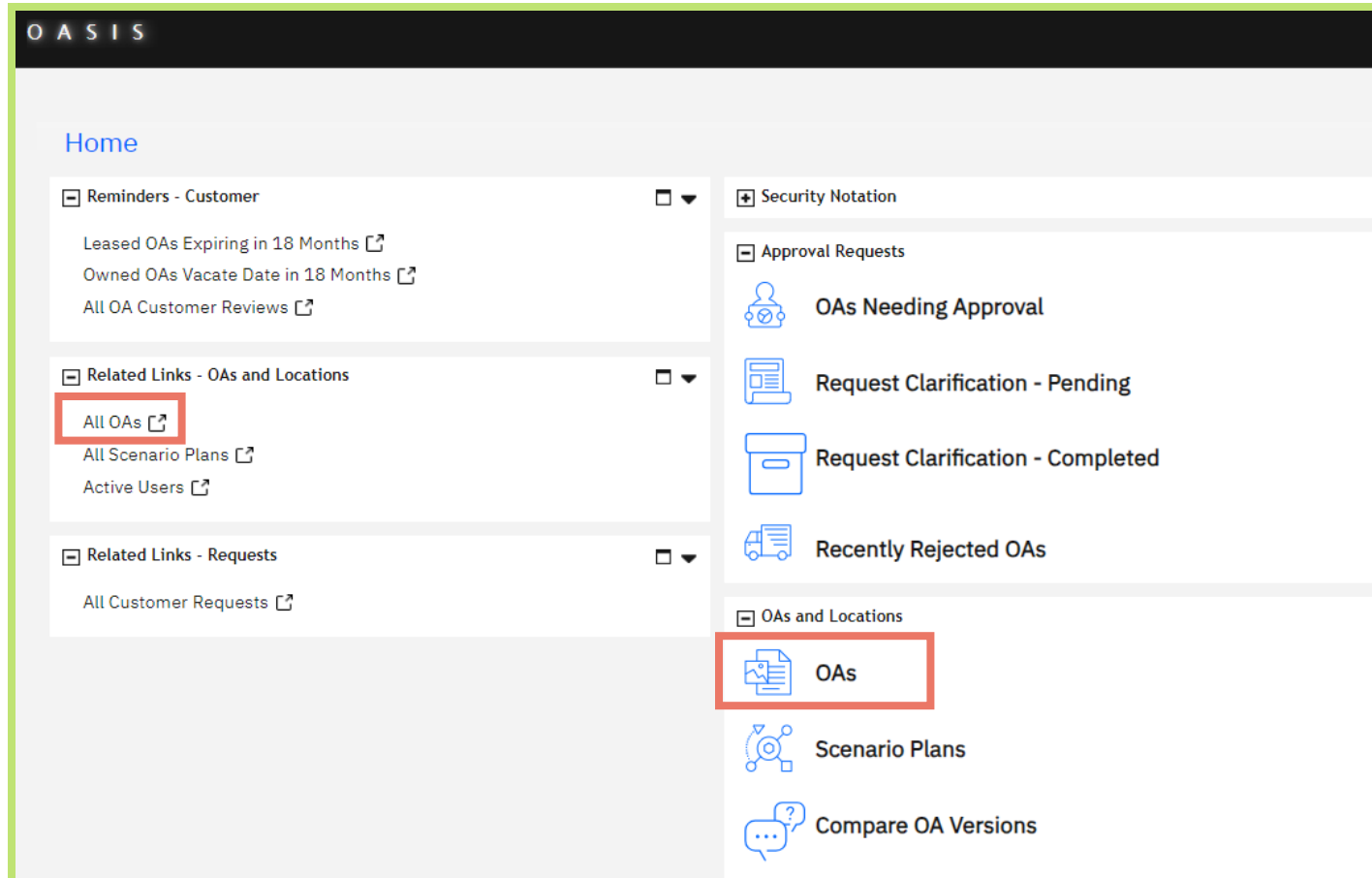


Figure 5. Home Page

2. After you have selected an OA, you see it is organized into tabs containing different sets of data. The OA opens to the **General** tab which displays basic OA information such as whether it's leased or owned, cancelable or non-cancelable, the term, and the address.

Occupancy Agreement: AIL07403-300

General | Site Details | Contact Details | Locations | Clauses | Payments | History | Notifications | Notes & Documents | Reports

General

ID	AIL07403	Revision	300	GSA Status	Customer Approved
Type	<input checked="" type="radio"/> Leased <input type="radio"/> Owned	Contract Status	Active		
Lease Number	LIL01215	Cancelable	<input checked="" type="radio"/> Cancellable		

Critical Dates

Commencement Date	10/01/2022	OA Term	5 Years
OA Expiration Date	09/30/2027		
Vacate Date			
Firm Term End	10/01/2022	Escalation Month	October
New Assignment Reason	Replacement		

Primary Location

Hierarchy Path	\Locations\COOK HOUSE
----------------	-----------------------

Primary Address

Address	508 S 8TH ST
Zip/Postal Code	62703-1607
Geography Path	\Geography\NORTH AMERICA\UNITED STATES OF AMERICA\ILLINOIS\SANGAMON\SPRINGFIELD

Figure 6. OA General Tab

3. The **Site Details** tab displays building information such as the building ID number and name, the address, the GSA region in which it's located, whether it's a leased or federally owned building, and the building's total usable and rentable square footage.

Occupancy Agreement: AIL07403-300

General **Site Details** Contact Details Locations Clauses Payments History Notifications Notes & Documents Reports

Primary Location

Location ID	IL2225	Parent ID	
Location Name	COOK HOUSE	Parent Name	
Hierarchy Path	\Locations\COOK HOUSE		
Address	508 S 8TH ST	Tenure	Leased
City	SPRINGFIELD	GIS Latitude	39.7970594
State	ILLINOIS	GIS Longitude	-89.64508
GSA Region	05	Rentable Area	3860
Delegated	No	Usable Area	3860
Delegation Type		FM Field Office	SOUTHERN IL/IN SERVICE CENTER
Delegation Agency Bureau		Congressional District	13
FRPP Status	Active	FRPP Primary Use	Office
FRPP Unique Identifier		FRPP Mission Dependency	Mission Dependent, Not Critical

Figure 7. OA Site Details Tab

4. The **Contact Details** tab displays the names and email addresses for both customer agency and GSA OA contacts. This includes the GSA Responsible Government Associate (RGA), the GSA Contract Administrator, and customer agency Ordering Officials. Note that the GSA Contract Administrators are not lease contract administrators, they are the people responsible for creating and maintaining the OA record in OASIS.

The **Tenant** section displays customer agency OA employee counts used for Federal Real Property Profile (FRPP) reporting. The three **Customer Identifier** fields are also in this section (See Chapter 3 for more information on these fields).

Occupancy Agreement: AIL07403-300

General Site Details **Contact Details** Locations Clauses Payments History Notifications Notes & Documents Reports

Role ↓	Person	Work Phone	Fax	Email	Primary Organization
Contains	Contains	Contains	Contains	Contains	Contains
RGA	Allison Heck			allison.heck@gsa.gov	General Services Administration
Ordering Official	Allison Heck			allison.heck@gsa.gov	General Services Administration
Ordering Official	Stefanie Geaney			stefanie.geaney@gsa.gov	PUBLIC BUILDINGS SERVICE (FIELD OFFICE)
Ordering Official	Christopher Naya			christopher.naya@gsa.gov	General Services Administration
Contract Administrator	Logan Noll			logan.noll@gsa.gov	General Services Administration
Contract Administrator	Deann Salazar			deann.salazar@gsa.gov	General Services Administration
Contract Administrator	Kenny Tiranno			kenneth.tiranno@gsa.gov	General Services Administration
Contract Administrator	Lisa McCoy			lisa.mccoy@gsa.gov	General Services Administration
Contract Administrator	Sharon Olano			sharon.olano@gsa.gov	General Services Administration
Contract Administrator	Rebecca Formenti			rebecca.formenti@gsa.gov	General Services Administration

Items per page: 10 1 - 10 of 14 items 1 of 2 pages

Tenant

Tenant Organization Lookup: \Organizations\General Services Administration\AB Codes\GENERAL SERVICES ADMINISTRATION\PUBLIC BUILDINGS SERVICE (FIELD OFFICE)

AB Name: PUBLIC BUILDINGS SERVICE (FIELD OFFICE)

AB Code: 4766

Federal Employees	20
Contract Employees	0
Teleworking Employees	10

Customer Identifier 1: Internal Contact: Serena Smith, 555-202-1234

Customer Identifier 2: Acct Code: 49-37651

Customer Identifier 3: Division: PTD

Figure 8. OA Contact Details Tab

- The **Locations** tab displays the various space and zero square foot items (such as antennas and parking) associated with the OA. At the top, the **Location Summary** provides the total square footages; **Premise Locations** lists the individual spaces. Similarly, the **Zero Square Feet Summary** provides the total counts, while the **Zero Square Feet Items** lists each zero square foot item and associated details.

This tab displays your assigned square footage which is the lease contract square footage or the measured square footage in owned. There may be variances between the assigned and billed square footage due to SDM measurement changes or building R/U changes which are not passed on to the customer OAs

Occupancy Agreement: AGA01564-300

General Site Details Contact Details **Locations** Clauses Payments History Notifications Notes & Documents Reports

The square footage on this tab represents the last GSA MEASURED square footage. This may vary from your OA BILLED square footage. GSA does not update an agency's OA square footage when we take measurements outside of the SDM Remeasurement process. Please refer to the Payment Lines tab to view your ASSIGNED and BILLED square footage.

Location Summary

RU Factor	1.25		
General Use - USF	371.9 square-feet	General Use - RSF	464.88 square-feet
Warehouse - USF	0 square-feet	Warehouse - RSF	0 square-feet
Total Usable	371.9 square-feet	Total Rentable	464.88 square-feet

Premise Locations

2 total found

Premise Name	Hierarchy Path	Current Use Space Class	Included In Rent	Effective From	Effective To	Usable
2928443	\\Locations\JULIETTE GORDON LAW\JULIETTE GORDON LOW, FB\Basement 001\2928443	PTL	<input checked="" type="checkbox"/>	04/30/2023	01/01/2100	46.38 square-feet
3410663	\\Locations\JULIETTE GORDON LAW\JULIETTE GORDON LOW, FB\Floor 001\3410663	INS	<input checked="" type="checkbox"/>	04/30/2023	01/01/2100	325.52 square-feet

Zero Square Feet Summary

Structure Parking	6	Surface Parking	0
Antennas	0	Boat Docks	0
Bridges	0	Kiosks	0
Railroad Crossing	0	Wareyard	0
Land	0		

Zero Square Feet Items

ID	Name	OA	Asset Category	Spec Class	Primary Location	Free Space
EQ-1054312	3148308	AGA01564	01 - Assigned	Structured	\\Locations\JULIETTE GORDON LAW\JULIETTE GORDON LOW, FB	
EQ-1098071	3037874	AGA01564	01 - Assigned	Structured	\\Locations\JULIETTE GORDON LAW\JULIETTE GORDON LOW, FB	
EQ-1238454	3148309	AGA01564	01 - Assigned	Structured	\\Locations\JULIETTE GORDON LAW\JULIETTE GORDON LOW, FB	
EQ-1334939	3037591	AGA01564	01 - Assigned	Structured	\\Locations\JULIETTE GORDON LAW\JULIETTE GORDON LOW, FB	
EQ-1411930	3037875	AGA01564	01 - Assigned	Structured	\\Locations\JULIETTE GORDON LAW\JULIETTE GORDON LOW, FB	
EQ-1438201	3148323	AGA01564	01 - Assigned	Structured	\\Locations\JULIETTE GORDON LAW\JULIETTE GORDON LOW, FB	

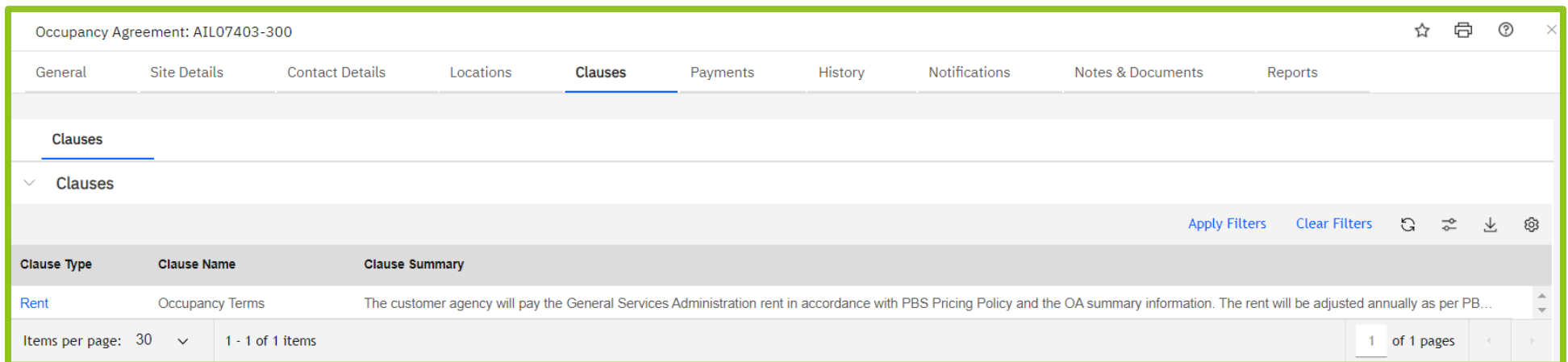
Figure 9. OA Locations Tab

6. The **Clauses** tab contains any clauses associated with the OA, which will generally be limited to a single clause covering the basic obligation to pay rent. As of this Guide's publication date, the Rent clause reads:

This is a copy of the customer agency's electronically approved OA. Approval in OASIS obligates the 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. The customer agency will pay the General Services Administration rent in accordance with PBS Pricing Policy and the OA summary information. The rent will be adjusted annually as per PBS Pricing Policy. It is the customer agency's responsibility to notify their appropriate accounting and budget groups of the rent terms.

The only other valid OA clauses address non-cancellable space, return on investment pricing, broker commission credits, free space and free rent, and agency-funded shell. GSA removed the remaining clauses that replicated language in the Pricing Desk Guide. We also removed ad hoc and agency-specific clauses, which our analysis revealed to be inconsistent across GSA, restatements of OA terms (such as number of parking spaces), or unapproved deviations from Pricing Policy. The OA must be nationally consistent and individualized ad hoc clauses are not appropriate for this document and cannot be added.

Note that removing clauses does not change our policies. Customer agencies continue to have all rights specified in the Pricing Desk Guide.



Occupancy Agreement: AIL07403-300

General Site Details Contact Details Locations **Clauses** Payments History Notifications Notes & Documents Reports

Clauses

Apply Filters Clear Filters

Clause Type	Clause Name	Clause Summary
Rent	Occupancy Terms	The customer agency will pay the General Services Administration rent in accordance with PBS Pricing Policy and the OA summary information. The rent will be adjusted annually as per PB...

Items per page: 30 1 - 1 of 1 items 1 of 1 pages

Figure 10. OA Clauses Tab

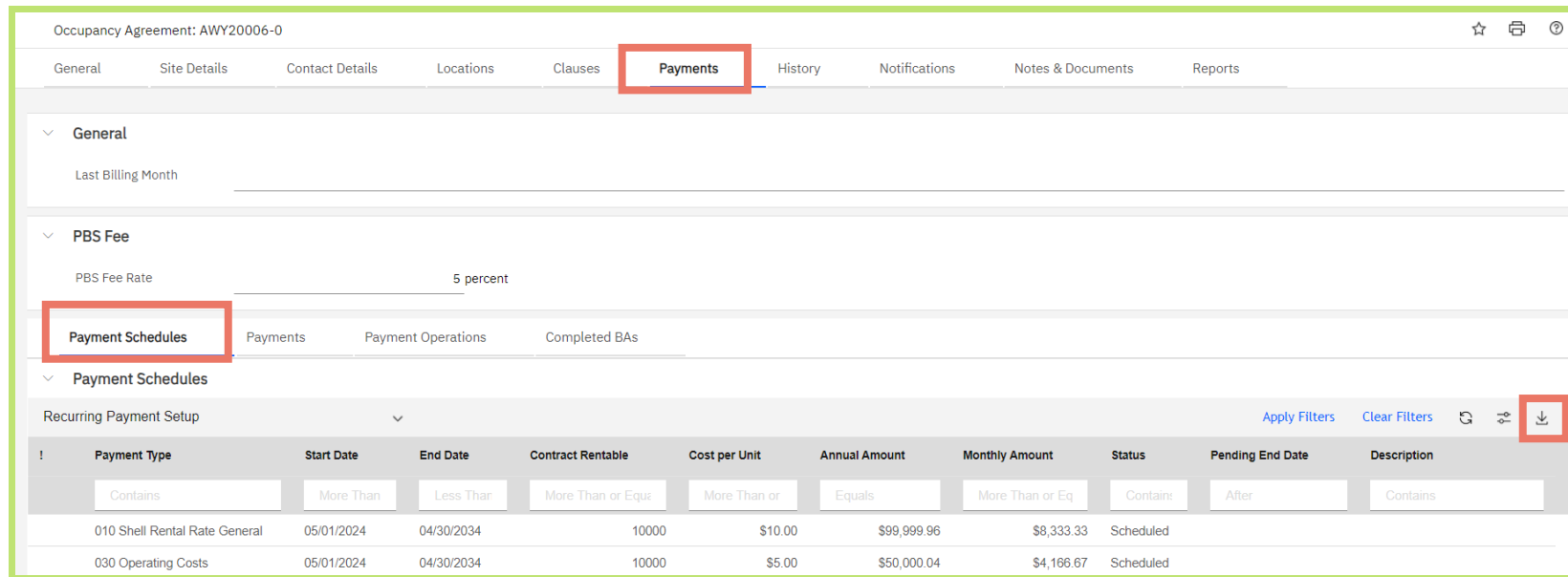


Figure 11. OA Payments Tab – Payment Schedules Subtab

7. The **Payments** tab provides access to both the **Payment Schedules** listing each individual rate with start and end dates, and the past and future payment amounts (bills), found in the **Payments** subtab.
- **General** - Displays the last billing month.
 - **PBS Fee** - Displays the 4%,5%, or 7% charge associated with cancelation rights (lease OAs).
 - **Payment Schedules Subtab** - Contains information on each different rent rate. This table can be filtered, sorted, or exported like any other query.
 - **Payment Type** - The rental rate component. An OA can have multiple schedules for the same rate in cases where rent is blended or has different start and end dates. Expired rates will also show up on the payment schedule.
 - **Start and End Dates** - Display the rate term.
 - **Contract Rentable** - The RSF applied to the rate.
 - **Cost per Unit** - The rate per RSF.
 - **Annual Amount** and **Monthly Amount**
 - **Status** - Lines that are **Scheduled** have been approved and finalized. Lines that are **Pending** still require finalized and will not bill until scheduled.
 - **Pending End Date** - To end a payment schedule, a pending end date is input and then finalized to update the expiration date. If there is a pending end date in this field the OA is proposing to end this rate line but has not yet finalized the OA amendment. The schedule will continue to bill until finalized.
 - **Description** - if applicable

8. Any payment line can be selected for additional information. However, only the Tenant Improvement line will have information useful to the customer. The Tenant Improvement line will contain information on the principal, interest rate, and term.

Payment Schedule: Payment Schedule-1073152

General

ID: Payment Schedule-1073152 Status: Scheduled

Name: 020 Tenant Improvement Used

Description:

Details

Payment Type: * 020 Tenant Improvement Used

Expected Cash Amount: * \$1,165.74 US Dollars Charge Amount Basis: per Annual

Cost per Unit: \$.00 US Dollars Contract Rentable: 0

Annual Amount: \$13,988.88 US Dollars

Appraised Antenna Rate:

Derived From Schedule:

Bulk Payment:

Pending Update: Pending End Date:

Improvements

Principal Amount: \$129,695.87 Interest Rate: 7

Start Date: 11/01/2010 End Date: 11/01/2025

Duration in Months: 180 Annual Amount: \$13,988.92

Figure 12. Tenant Improvements

- **Details Section Includes:**
 - **Expected Cash Amount** - Monthly TI Charge
 - **Annual Amount**
 - **Contract Rentable and Cost per Unit** - will be blank for TI as we bill an amortized monthly dollar amount.
- **Improvements Section Includes:**
 - **Principal Amount** - The total TI that was expanded on this OA.
 - **Interest Rate**
 - **Start Date and End Date**
 - **Duration in Months**
 - **Annual Amount**

9. Click the **Payments** subtab on the **Payments** tab to view all past and future payments for the OA An individual payment line is added for each month that a rate bills. Therefore a 5-year shell rate would have 60 lines, one for each month. This table can be filtered, sorted, or exported like any other query.

- **Due Date** - The month the line will bill. If this action is being processed late, this field will show which month the charge will appear on the rent bill and in ROW.
- **Payment Type** - Specifies the rent line. Multiple payment types for the same month will be combined on the rent bill and in ROW.
- **Expected Expense** - Monthly amount.
- **Status:**
 - **Active** - This amount is finalized and will bill.
 - **Paid** - This charge has previously billed.

OASIS does not show past payments from GSA's previous system. To find OA payments dated before OASIS, continue to use ROW.

The screenshot shows the 'Payments' subtab for an Occupancy Agreement (ACO07053-300). The 'Payments' subtab is highlighted with a red box. Below the subtab, a table displays payment lines with the following columns: Due Date, Payment Type, Expected Expense, and Status. The table contains 12 rows of data, showing monthly payments from 06/15/2024 to 08/15/2024. The 'Due Date' column is filtered to 'Equals' and the 'Payment Type' column is filtered to 'Contains'. The 'Expected Expense' column is filtered to 'Equals' and the 'Status' column is filtered to 'Contains'. The table shows that payments are categorized into '010 Shell Rental Rate General' and '030 Operating Costs'. The status of all payments is 'Active'.

Due Date	Payment Type	Expected Expense	Status
06/15/2024	010 Shell Rental Rate General	\$432.70	Active
06/15/2024	010 Shell Rental Rate General	\$432.70	Active
06/15/2024	030 Operating Costs	\$167.95	Active
06/15/2024	030 Operating Costs	\$167.95	Active
07/15/2024	010 Shell Rental Rate General	\$432.70	Active
07/15/2024	010 Shell Rental Rate General	\$432.70	Active
07/15/2024	030 Operating Costs	\$167.95	Active
07/15/2024	030 Operating Costs	\$167.95	Active
08/15/2024	010 Shell Rental Rate General	\$432.70	Active
08/15/2024	010 Shell Rental Rate General	\$432.70	Active

Figure 13. OA Payments Tab – Payments Subtab

10. Payment Operations Subtab – This tab displays without any information in it. It is a backstage operation that is not viewable in the customer portal.

11. Completed BAs Subtab – Billing adjustments (BAs) processed on a completed OA, also known as a Closed OA, are found here.

Created Date/Time	Record Name	ID	Payment Type	Amount	Status	Name
06/06/2024 12:50:03	Completed BA Operations-1000053	AGA00403	BA040 Real Estate Taxes	\$184.23	Completed	Arisa Soper

Items per page: 10 | 1 - 1 of 1 items

Figure 14. OA Payments Tab – Payments Subtab (Completed BAs)

12. The History tab lists any previous modifications to the OA. Click on the line to view the previous OA version. Each revision receives a new Revision Number. Migrated OAs will begin with revision 300 while OASIS revisions begin with 1.

To compare different versions of an OA side-by-side, use the **Compare OA Versions** feature described in Chapter 6.

Occupancy Agreement: AMD05428-301

General | Site Details | Contact Details | Locations | Clauses | Payments | **History** | Notifications | Notes & Documents | Reports

Modifications History of OA

ID	Name	Revision	Lease Type	Expiration Date	Rentable	Rate	Status
AMD05428	AMD05428	300		10/31/2030	402.5 square-feet	\$0.00	History

Items per page: 10 | 1 - 1 of 1 items

Modification History

Amendment Date	Amended By	Current Amendment	Description	Amendment Reason	Change Type	Modified Date/Time
No data to display						

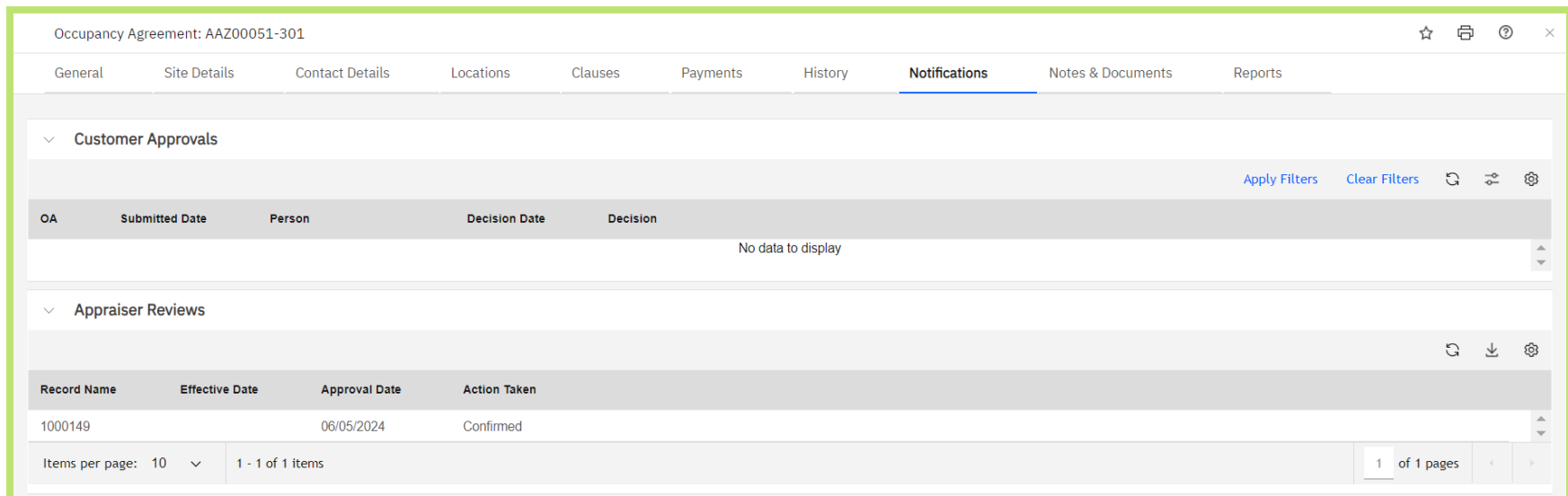
Figure 15. OA History Tab

13. The **Notification** tab displays multiple types of approvals and notifications

- **Customer OA Review** - Displays OAs that were sent to your agency for review. It includes who submitted the OA, who approved the OA, date and time of approval, and the Approved/Rejected Decision. Clicking on any line will open the Approval Form for more information.

Note: this will only show OA approvals submitted June 2024 and later. Scroll down for previous submittals.

- **Appraisal Reviews** - Displays the market rental rate determined by the most recent FAR appraisal.
- **Archived Reviews (pre June 2024)**- Displays OA approval action items that were sent prior to June 2024. This table displays all Ordering Officials available to the OA on the date it was sent. The review status and resolved review type will indicate the decision on the OA. This can be used for historical purposes.



OA	Submitted Date	Person	Decision Date	Decision
No data to display				

Record Name	Effective Date	Approval Date	Action Taken
1000149		06/05/2024	Confirmed

Figure 16. OA Notifications Tab

14. The **Notes & Documents** tab provides access to any documents associated with the OA. (See Figures 17 & 18)

- **Customer Documents** - Displays a copy of the the pre and post-approval OA summaries, which are essentially unapproved and approved versions of the OA.
 - i. **Pre - Approval Snapshot** captures the moment when the OA is sent for customer approval from GSA, but has NOT been approved. The approval at the end of the document will remain blank for all pre-approvals. A different pre-approval document will be created each time an OA is sent for your review.
 - ii. **Post - Approval Snapshot** captures the moment when the OA was approved by the Ordering Official. The approval can be found at the end of the document and will be populated with OA number - Version, Customer Approver, Review Status, and Completed Date/Time (See Figure 18). A different post-approval document will be created each time an OA is sent for your review and approved.
 - iii. The pre and subsequent post approval documents will continue to be displayed in Notes and Documents for the life of the OA.

15. OA Documents - Includes any OA-associated documents GSA shares with you, which could include lease documents and floorplans.

Figure 17. OA Notes & Documents Tab

Approval Information			
OA Number - Version	Person	Review Status	Completed
AIL07403-301	Deann Salazar	Approved	06/03/2024 10:34:25

Figure 18. OA Notes & Documents Tab (Post-Approval Snapshot)

16. The **Reports** tab provides various options to export or print the OA. For best results export to Excel, by clicking the **Export Report** icon in the upper left to PDF format or select the **Print Report** (printer) icon in the upper left. See Appendix B for an overview of the OA Summary report. For more details about the OA Summary (See section Appendix B – OA Summary Report).

Occupancy Agreement: AIL07403-300

Contact Details Locations Clauses Payments History Notifications Notes & Documents **Reports**

Form Export Print

Showing page 1 of 2 Go to page:

OA Summary

General Information

OA Number	OA Type	Lease Number
AIL07403	Leased	LIL01215

AB Code	AB Name
4766	PUBLIC BUILDINGS SERVICE (FIELD OFFICE)

Cancellable	Revision	Amendment Reason
Cancellable	300	

Customer Identifier 1	Customer Identifier 2	Customer Identifier 3
Internal Contact: Serena Smith, 555-202-1234	Acct Code: 49-37651	Division: PTD

Commencement Date	Expiration Date	Firm Term End	Escalation Month
10/01/2022	09/30/2027	10/01/2022	October

Clause Name	Clause Summary
Occupancy Terms	The customer agency will pay the General Services Administration rent in accordance with PBS Pricing Policy and the OA summary information. The rent will be adjusted annually as per PBS Pricing Policy.

Location Information

Location ID	Location Name	Address	City	State	Zip Code	Region
IL2225	COOK HOUSE	508 S 8TH	SPRINGFIELD	ILLINOIS	62703-1607	05

Export Print

Figure 19. OA Reports Tab

3: Review and Approve OAs

GSA sends OAs for customer approval solely via OASIS. OAs from all GSA regions are sent to a single customer agency queue. Only the **Ordering Official** customer user role can approve OAs in OASIS, but all customer users can participate in the review and add internal comments to the review.

OA Purpose

The OA is an interagency agreement covering your space assignment at a specific location. GSA has updated their process to reflect the purpose of the OA and ensure it provides the best information and is accurate when sent for your review. Approval of the OA signifies the agency agrees with the terms and conditions of the occupancy and GSA should proceed with the space acquisition process. Once an agency takes occupancy of the space, the OA can be amended to reflect natural lifecycle changes (such as operating escalations, real estate taxes, and parking escalations) or to reflect agency driven changes (such as parking updates, expansions or requesting additional TI).

Approval Requirements

An OA requires customer approval prior to GSA obtaining space on the agency behalf. Once the agency takes occupancy, natural lifecycle changes or minor agency driven changes do not require approval. Please see below for when an OA approval is required.

Action	OA Approval Needed
New lease acquisition	Yes
New owned occupancy	Yes
Change in cancellation rights	Yes
Lease continuing need (extension, renewal, succeeding lease)	No
Expansion of Space	Yes
Change to Parking or Antenna	No
Additional TI Added to Occupancy	Yes
Reduction or Full Release	No
Annual Escalation (operating, parking, RET, BSAC, etc.)	No
Billing Adjustment	No
Other- Evaluated on a case-by-case basis	Depends

OA Timing

OAs are now sent to customer when there is an award pending. This ensures GSA can use the actual financial terms and conditions instead of estimated amounts, and ensures the customer approves of the terms prior to obligating government funds. It is critical that GSA obtain timely review and approval of OAs to keep the project on schedule and to honor contract bids. GSA asks that you review and approve OAs within **3 weeks** of receipt. This allows for a thorough review of the OA while emphasizing the importance of the OA approval on project timing. If the agency disagrees with these actual award terms and conditions, that means the award is at risk.

Completing the OA Review

When reviewing an OA, you have the option to approve it, ask for clarification before deciding whether to approve it, or reject it.

If the OA awaiting approval is a new version of an existing OA (rather than a new OA), use the **Compare OA Versions** feature described in Chapter 6 to quickly identify changes in the new version.

The Approval section of the Customer Portal has several different queries:

- **OAs Needing Approval** This is a list of all the OAs with your agency that require your immediate review. OAs on this list will be in a Review In Progress stage and will remain on the list until they are approved or rejected.
- **Request Clarification- Pending** This is a list of all the request clarifications you have sent to GSA that are still under review. OAs will remain on this list until GSA finishes their research and provides a response.
- **Request Clarifications- Completed** This is a list of all request clarifications that have gone to GSA and received a response. You can open this query, search on your OA and quickly read GSA's answer.
 - **Recently Rejected OAs** This is a list of all OAs that were recently rejected by your agency in the last 30 days. This will also include any OAs that GSA cancelled and removed from your approval queue.

1. Click on the **OAs Needing Approval Query** from the Portal.

a. This opens your individualized query showing all OAs that are currently with you and your agency for approval.

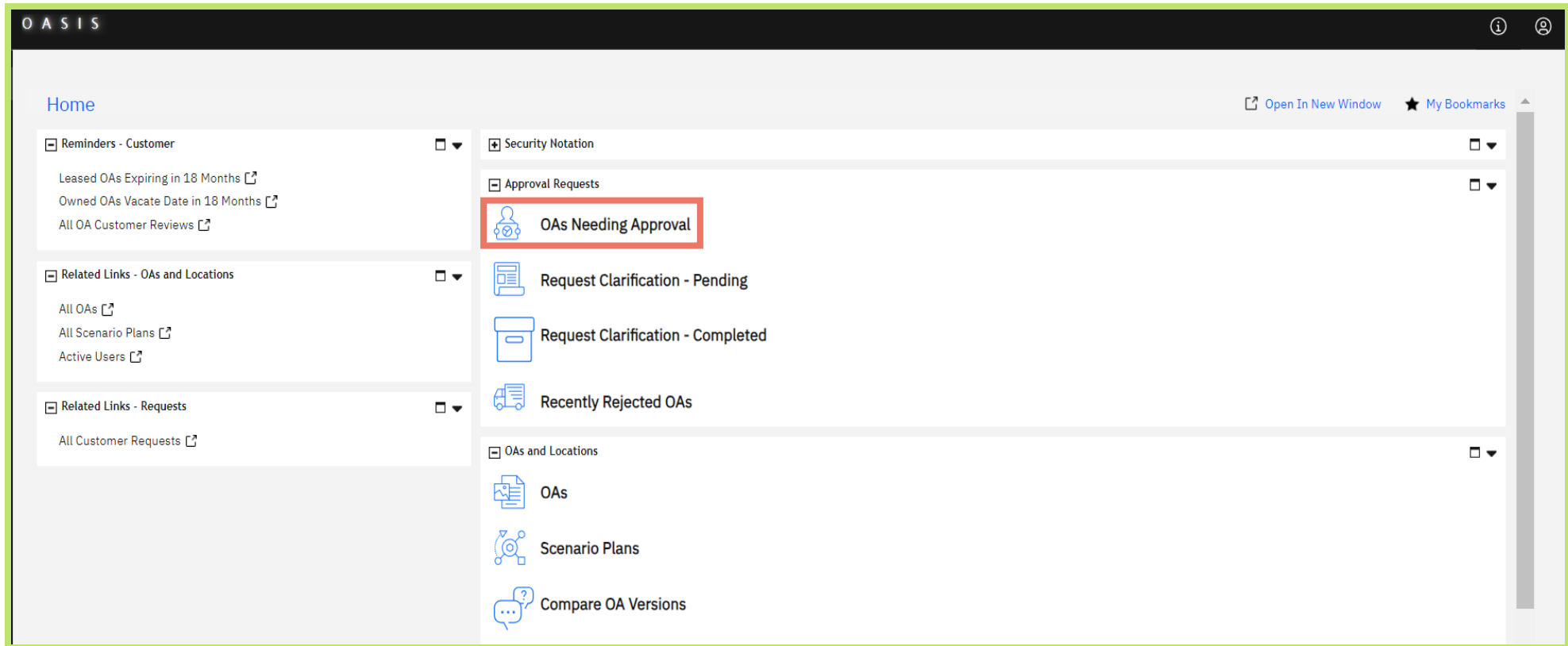


Figure 20. Home Page

- The OAs Needing Approval query shows: ID (OA#), AB Code, Location, Location Name, City, State, Region, Occupancy Right, Lease Number, Modified Date/Time, Reviewer, Reason for Transmittal, and Effective Date of Change.

Home / OAs Needing Approval

Review In Progress Customer Approval

<input type="checkbox"/>	ID (OA#)	AB Code	Location ...	Location Name	City	State	Region	Occupancy Right	Lease #
	Contains	Contains	Contains	Contains	Contains	Contains	Conte	Contains	Contains
<input type="checkbox"/>	APA00934-302	4766	PA0676	MAX ROSENN U.S. COURTHOUSE	WILKES BARRE	PENNSYLVANIA	03	Leased	LPA80700
<input type="checkbox"/>	AMT03208-301	4766	MT5514	GREAT NORTHERN TOWN CENTER -HELENA - FRONT ST	HELENA	MONTANA	08	Leased	LMT00768
<input type="checkbox"/>	AMO04811-301	4766	MO1902	RAY BLDG LEASED PARKING LOT	ST. LOUIS	MISSOURI	06	Leased	LMO60046
<input type="checkbox"/>	ADC06873-301	4766	DC0020	STEWART LEE UDALL DEPT OF INTR	WASHINGTON	DISTRICT OF COLUMBIA	11	Owned	
<input type="checkbox"/>	ATX09993-301	4766	TX2804	MEJIA BUILDING TX2804	LAREDO	TEXAS	07	Leased	LTX16778
<input type="checkbox"/>	ANY03884-301	4766	NY7340	NIAGARA CENTER	BUFFALO	NEW YORK	02	Leased	LN23418
<input type="checkbox"/>	AAL02173-301	4766	AL0003	FRANK JOHNSON ANNEX	MONTGOMERY	ALABAMA	04	Owned	
<input type="checkbox"/>	AAL02173-301	4766	AL0003	FRANK JOHNSON ANNEX	MONTGOMERY	ALABAMA	04	Owned	
<input type="checkbox"/>	ADC00005-301	4766	DC0011	POSTAL SQUARE	WASHINGTON	DISTRICT OF COLUMBIA	11	Leased	LDC90306
<input type="checkbox"/>	AWV02229-301	4766	WV0269	MVB BANKING CENTER	MARTINSBURG	WEST VIRGINIA	03	Leased	LWV07322
<input type="checkbox"/>	ANC03576-301	4766	NC1000	PBS MILLENNIUM BUILDING, WILMINGTON, NC	WILMINGTON	NORTH CAROLINA	04	Leased	LNC01893

Figure 21. OAs Needing Approval Query

Home / OAs Needing Approval

Review In Progress Customer Approval

<input type="checkbox"/>	City	State	Region	Occupancy Right	Lease #	Modified Date/Time	Reviewer	Reason for Transmittal	Effective Date of Change
	Contains	Contains	Conte	Contains	Contains	More Than or Equals	Contains	Contains	More Than or Equals
<input type="checkbox"/>	WILKES BARRE	PENNSYLVANIA	03	Leased	LPA80700	06/03/2024 14:20:23		Reimbursable Services	10/01/2024
<input type="checkbox"/>	HELENA	MONTANA	08	Leased	LMT00768	05/31/2024 15:46:50		Reimbursable Services	10/01/2024
<input type="checkbox"/>	ST. LOUIS	MISSOURI	06	Leased	LMO60046	05/31/2024 15:41:42		Reimbursable Services	10/01/2024
<input type="checkbox"/>	WASHINGTON	DISTRICT OF COLUMBIA	11	Owned		05/31/2024 15:31:18		Reimbursable Services	10/01/2024
<input type="checkbox"/>	LAREDO	TEXAS	07	Leased	LTX16778	05/31/2024 15:17:25		Reimbursable Services	10/01/2024
<input type="checkbox"/>	BUFFALO	NEW YORK	02	Leased	LN23418	05/31/2024 15:00:42		Reimbursable Services	10/01/2024
<input type="checkbox"/>	MONTGOMERY	ALABAMA	04	Owned		05/31/2024 09:50:30		New/Increase TI	06/01/2024
<input type="checkbox"/>	MONTGOMERY	ALABAMA	04	Owned		05/31/2024 09:49:49		New/Increase TI	06/01/2024
<input type="checkbox"/>	WASHINGTON	DISTRICT OF COLUMBIA	11	Leased	LDC90306	05/29/2024 15:31:47		Reimbursable Services	10/01/2024
<input type="checkbox"/>	MARTINSBURG	WEST VIRGINIA	03	Leased	LWV07322	05/29/2024 15:09:55		Other	06/01/2024
<input type="checkbox"/>	WILMINGTON	NORTH CAROLINA	04	Leased	LNC01893	05/28/2024 08:58:58		Reimbursable Services	10/01/2024

Figure 22. OAs Needing Approval Query

3. Select an OA from the list to begin the review.



Enter your name in the **Optional Customer Reviewer** field so other agency users know that you are currently reviewing this OA and you don't duplicate work. Note: this field is restricted to 30 characters.

The screenshot displays the 'Customer Approval' form for 'Customer Approval-1000115 - ADC06873-301'. The form is organized into several sections:

- General:** Contains fields for Transmittal Reason (Reimbursable Services), Effective Date of Change (10/01/2024), Submitted By (Rob Bunting), Submitted Date (05/31/2024 15:31:04), Decided By, Decision Date, Decision (Review In Progress), and Reason.
- OA:** Includes links for 'Open OA Record' (ADC06873-301) and 'Open OA Summary' (Pre-Approval OA - ADC06873 - 301 - 05/31/2024 1931.pdf), along with Location Code (DC0020) and Location Name (STEWART LEE UDALL DEPT OF INTR).
- Optional Customer Reviewer - Available to track internal reviewer.** Features a text input field for the Reviewer's name.
- Optional Customer Notes - Available for internal notes. This is not monitored by GSA.** Includes an 'Add' button and a table with columns for Note, By, and Date/Time. The table currently shows 'No data to display'.
- Request Clarification from GSA.** Includes an 'Add' button and a table with columns for Customer, Submitted Date, Customer Question, Status, GSA, Response Date, and Response. This table also shows 'No data to display'.

Figure 23. Customer Approval Form

4. The approval form includes all the information on the OA sent for you to review.
 - a. **Top of the Form Buttons-** Buttons will only appear for Ordering Official Users
 - i. **Approve** - Select when ready to Approve the OA. (See Approving an OA Section for approval popup).
 - ii. **Reject** - Select if OA approval must be Rejected. (See Rejecting an OA Section for rejection popup).
 - iii. **Save** - Select to Save information entered in the below sections.
 - iv. **X** - closes the form without saving.
 - b. **General Section:**
 - i. **Reason for Transmittal** - A drop down completed by GSA to explain why the OA requires approval. If the approval is needed for multiple reasons GSA will select the choice that best fits the need.
 - ii. **Effective Date of Change** - A date field completed by GSA to estimate the effective date of the change to the rent. Note this date could be in the past if GSA is processing the action late.
 - iii. **Submitted By and Submitted Date/Time** - The GSA user who sent the OA for customer review and the date it was sent.
 - iv. **Decided By and Decision Date and Time** - Will populate with the customer username and date the OA was approved/rejected.
 - v. **Decision** - Will populate once the OA is approved/rejected.
 - vi. **Rejection Reasons** - Will populate with the rejection reasons entered by the user when rejecting the OA under review.
 - c. **OA Section:**
 - i. **Open OA Record** - Link to the OA under review. Clicking on this link will take you directly to the OA record.
 - ii. **Open OA Summary** - Link to the OA Summary report. Clicking on this link will open the OA document.
 - iii. **Location Code** - Displays the OA's location code.
 - iv. **Location Name** - Displays the name of the location.
 - d. **Customer Review Section:**
 - i. **Reviewer** - For internal agency use. Users can type identifying information into this field to assist the internal customer review process. Examples of text would be "Username" of person currently reviewing, "First Review Complete", "Ready for Username" to notify a fellow customer user that it's ready for their review. This is a free form Text Field and GSA does not monitor what users enter. The field will be visible and appear in the approval queue.
 - ii. **Customer Notes** - For internal agency user. Users can type comments or notes on the review that other users can view to assist in the internal customer review process. These comments are not monitored by GSA and do NOT become part of the agreement. They are for internal agency use only.
 - e. **Request Clarification from GSA Section:**
 - i. **Clarification Field** Used by the agency to ask a question to GSA. This is an editable section, and users can continue to add notes to the clarification until GSA completes the request. GSA will also be able to add information to update the agency on the status of the request if it requires prolonged research.

[Reviewing the OA](#)

After selecting an OA to review, users will move through the different OA tabs (described in Chapter 2) and validate the information matches the agency's expectation. The reviewer can take 4 separate actions:

1. Add an internal note for other agency reviewers.
2. Request clarification from GSA.
3. Approve the OA (Ordering Official Only)
4. Reject the OA (Ordering Official Only)

[Adding an Internal Review Customer Note](#)

OASIS provides an area for customer reviews to enter review notes that can be used by other customer reviews to see the status or internal information during the review. These notes do NOT become part of the OA record and are not monitored by GSA. They cannot be used to communicate with GSA or to amend information in the OA record.

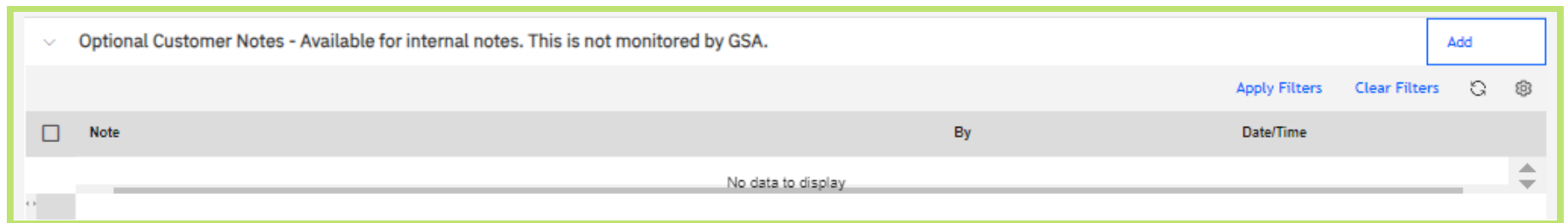


Figure 24. Customer Notes Section

To add an internal customer note:

1. Click ADD on the approval form.
2. A new popup will open.

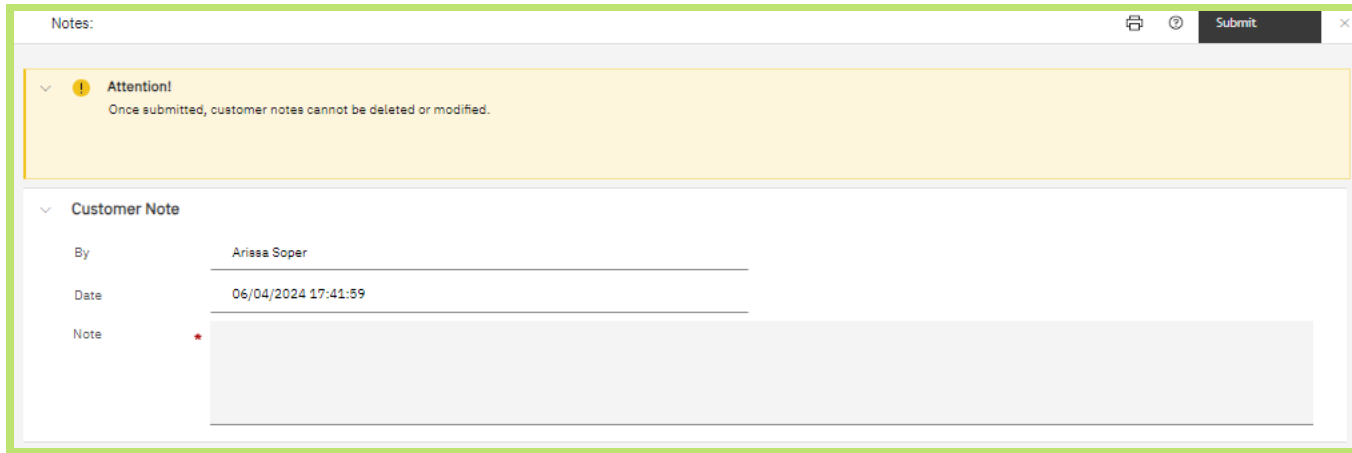


Figure 25. Customer Notes Section

3. The username and date/time will automatically populate.
4. Enter your note.
5. Click Submit - the note is now visible to everyone in the approval form under Customer Notes.
6. Clicking the X will close the popup without saving the note.

Request Clarification

Customers can ask GSA for clarification if they have a question about the OA under review. The question will go back to the regional OA Editors who will research the issue and provide an explanation. The approval request remains open during this stage. Other customer users may continue their review of the OA and the OA can be approved or rejected while awaiting clarification.

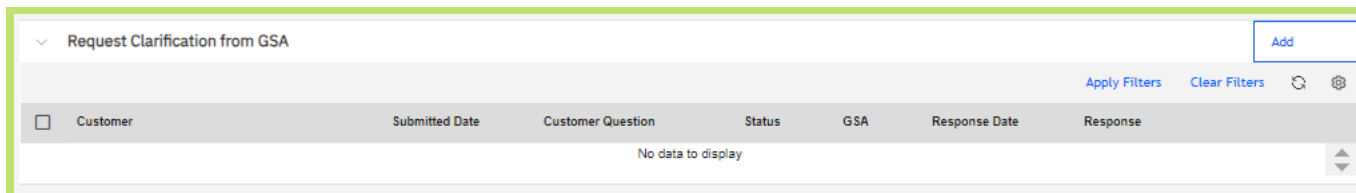


Figure 26. Customer Request Clairification Section

To Request Clarification:

1. Navigate to the Request Clarification section of the Approval Form
2. Click the **ADD** button.
3. A Request Clarification popup will open.

Request Clarification: [Print] [Help] [Submit]

General

Customer Approval [Link] Customer Approval-1000071 - ADC00005-301 Status

Customer

Customer Question *

Customer [Link] Arissa Soper

Submitted Date/Time 06/04/2024 18:15:50

GSA

GSA Response

GSA

Response Date/Time

Figure 27. Customer Request Clairfication Section

4. The General Section will auto populate with the Approval Status (most likely blank at this stage) and the OA Status (In Review)
5. Enter your question in the Customer Question field.
6. The customer username and date time will auto populate when you click **Submit**.

The request is now with GSA and can be viewed in the Request Clarification- Pending Query on the Customer Portal.

While under review with GSA, any customer user can add additional information to the clarification.

7. GSA may enter interim comments in their section if the question requires research or a prolonged time to gather data. You can view GSA's interim response in the approval form at any time.
8. Once GSA has completed their answer, the request clarification will be completed. You can view the response in the **Request Clarification- Completed Query** on the Customer Portal.

Approving an OA

GSA hopes that customers will be able to approve their OA after completing the initial review.

To approve an OA:

1. Open the Approval Form and **Click the Approve** button on the top left of the Form.
2. An approval pop up will open.

Approve: Print Help Continue Close

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

Attention!
 You are approving Occupancy Agreement-AAL02173-301. 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	12
Contract Employees	2
Teleworking Employees	5
Customer Identifier 1	Accounting Code 73-29459
Customer Identifier 2	Field Rep Janet Jones 555-305-7999
Customer Identifier 3	Org Code PTAD

Figure 28. Approving an OA

3. At the top is an important notice: *You are approving Occupancy Agreement (number). Clicking approve obligates your agency to fund any rent due for the 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.*
4. Complete the **Agency Information** section with the number of Federal **Employees**, **Contractor Employees**, and **Telework Employees** in this OA. These fields are used for Federal Real Property Profile (FRPP) reporting. GSA does not provide oversight of these numbers. Once they are entered, they require a new approval request to update.
5. Customer Identifiers are available for your internal use. Any information provided in these fields will populate in the OA queries and can be searched and reported on by the agency. Examples of Customer Identifiers an agency may wish to use include Agency Region Designation, Budget/Mission Activity, Subagency information, Etc.

If information was provided in a previous version of the OA, the fields contain those values. Any updates you make override the existing values and update the OA. Once input these values cannot be changed until the OA is submitted for another review and approval.
6. Click **Continue** in the upper right to complete the OA approval. Clicking **X** will close the pop up without saving or submitting to GSA. OASIS closes the approval, and it is no longer displayed in **OAs Needing Approval Query**.

Rejecting an OA:

Unfortunately, there are cases where a customer cannot approve the OA as submitted by GSA. Rejecting an OA means the agency cannot accept it as submitted. As the OA is based on the award negotiation, a rejection means the space procurement cannot proceed. A rejection should only be done if the agency and GSA cannot resolve the issue through a request clarification. If an OA is rejected GSA will reach out to discuss whether an amendment is needed or if the space acquisition project should proceed.

To reject an OA:

1. Open the Approval Form and **Click the Reject** button on the top left of the Form.
2. A reject pop up will open.
3. At the top is an important notice: *You are returning this request to GSA. This means you cannot approve the action and GSA cannot proceed with Occupancy Agreement (number). Please enter a comment below explaining the issue and click Continue. We will contact you to correct the issue or discuss next steps.*
4. Enter a rejection comment to assist GSA in understanding the issue.
5. Click **Submit**. Clicking on the **X** will close the popup without saving or submitting to GSA.
The approval form will no longer appear in your agency's **OAs Needing Approval Query**. It will now show in the **Recently Rejected OA Query** for 30 days.

Customer Approval: Customer Approval-1000141 - AAR03132-0

Save Approve Reject

Reject: Submit

Attention!
You are returning this request to GSA. This means you cannot approve the action and GSA cannot proceed with Occupancy Agreement-AAR03132-0. Please enter a comment below explaining the issue and click Submit. We will contact you to correct the issue or discuss next steps.

Rejection Reason *

Figure 29. Reject an OA

4: Request a Release of Space

GSA allows agencies to release space in cancellable OAs with 4 months release notice. To exercise this right, customers wishing to release space must submit a request in OASIS. GSA is unable to accept releases of space via any means other than OASIS. GSA is also unable to submit requests to release space on a customer's behalf OASIS provides full tracking of the request and ensure OA billing is stopped when moveout is confirmed. This chapter describes the steps to complete the release of space request.

Customers have the right to return space to GSA prior to OA expiration under the following conditions, as described in the Pricing Desk Guide (Chapter 5):

- There is no longer need for the space.
- The space is designated as cancelable*.
- The space is in marketable blocks.
- In lease OAs, the agency is at least 16 months into the OA term.

**Non-cancelable space can still be released once required conditions are met, as described in the Pricing Desk Guide.*

To release space in leased OAs, 4 months' notice is required. To release space in owned OAs, no notice is required, only the time needed for PBS to determine the above conditions are met. Parking and antennas do not require 4-month notice and can be released on request. Note that repayments may be required in OAs that had concessions such as free rent or broker commission credits, GSA-installed improvements, or tenant improvements. Refer to the latest edition of the Pricing Desk Guide for complete information on customer release of space rights.

After the space is determined to have been vacated, GSA confirms move out and the OA stops billing for the returned space.

Check the status of your request at any time by visiting **In Progress Customer Requests** from the **Customer Portal** and filtering the Request Class for Reduce Space.

This chapter covers submitting a full or partial release of space.



Before you start:

- Gather information: OA number, whether it is a leased or owned occupancy, target release effective date, if a partial release of space, specific identifiers of the space to be released (e.g., room numbers)
- Gather documents: such as marked up floorplans identifying space to be released, if applicable

Steps:



1. From the **Customer Portal**, click **Submit Request**. OASIS displays the **Submit Request** form.

The screenshot shows the Customer Portal Home Page. The page is titled "Home" and includes a navigation menu on the left and a main content area on the right. The navigation menu has three sections: "Reminders - Customer" (Leased OAs Expiring in 18 Months, Owned OAs Vacate Date in 18 Months, All OA Customer Reviews), "Related Links - OAs and Locations" (All OAs, All Scenario Plans, Active Users), and "Related Links - Requests" (All Customer Requests). The main content area is divided into several sections: "Security Notation", "Approval Requests" (OAs Needing Approval, Request Clarification - Pending, Request Clarification - Completed, Recently Rejected OAs), "OAs and Locations" (OAs, Scenario Plans, Compare OA Versions), and "Customer Requests" (Submit Request, Draft Requests, In Progress Requests, Recently Completed Requests). The "Submit Request" link is highlighted with a red box.

Figure 30. Customer Portal Home Page

- In the **Details** section, select whether the OA is **Leased** or **Owned**, and whether the request is for you or someone else in your office. If request is for someone else, see Appendix C.
- In the **Service Request** section, select **Reduce Space**

Home / Submit Request

Print Open In New Window Add to Bookmarks My Bookmarks

Save Save & Close Submit Request Delete

General

Request ID C1000822 Service Request Reduce Space Status Draft

Details

OA Type Leased Owned Request is for Me Someone Else

Service Request

Name	Description
<input type="radio"/> Billing Question	Ask a question about my bill
<input checked="" type="radio"/> Reduce Space	Initiated by the customer to start reduction in space action

Items per page: 10 1 - 2 of 2 items 1 of 1 pages

Existing OA

Find Remove

OA ID OA Name

Primary Location

Address City

Figure 31. Submit Request Form

- In the **Existing OA** section, click **Find** to link the OA to the request. OASIS presents you a list of your agency's leased or owned OAs, depending on your choice in Step 2.

The screenshot shows a form titled "Existing OA" with a dropdown arrow on the left. On the right side, there are two buttons: "Find" (highlighted with a red border) and "Remove". The form contains several input fields arranged in two columns:

- OA ID (left column)
- OA Name (right column)
- Primary Location (left column)
- Address (left column)
- City (right column)
- State/Province (left column)
- Region (right column)

Figure 32. Submit Request Form

- Select the radio button to the left of the applicable OA.
- Click **OK** ✓ near the top right to close the window.

The screenshot shows a table titled "Tenant OAs" with a dark header bar containing "OK" (checked) and "Cancel" buttons. The table has columns for ID, Name, Location ID, Address, City, StateProv, Tenant, Region, and Occupancy Agreement Typ. Below the table, there are filter buttons for each column labeled "Contains". The first row is selected, indicated by a radio button and a red box around it.

ID	Name	Location ID	Address	City	StateProv	Tenant	Region	Occupancy Agreement Typ
<input checked="" type="radio"/> ADC00005	ADC00005	DC0011	2 MASSACHUSETTS AVE NE	WASHINGTON	DISTRICT OF COLUMBIA	PUBLIC BUILDINGS SERVICE...	11	Leased
<input type="radio"/> AGA00403	AGA00403	GA1007	100 Alabama St SW	ATLANTA	GEORGIA	PUBLIC BUILDINGS SERVICE...	04	Leased
<input type="radio"/> AGA03448	AGA03448	GA1007	100 Alabama St SW	ATLANTA	GEORGIA	PUBLIC BUILDINGS SERVICE...	04	Leased
<input type="radio"/> AGA04276	AGA04276	GA2302	300 MULBERRY ST	MACON	GEORGIA	PUBLIC BUILDINGS SERVICE...	04	Leased
<input type="radio"/> AGU00584	AGU00584	GU7008	W Soledad Ave 520 WEST SOLEDAD AVE	HAGATNA	GUAM	PUBLIC BUILDINGS SERVICE...	09	Leased
<input type="radio"/> AIA02799	AIA02799	IA1543	800 2nd St SE City Lot 44	CEDAR RAPIDS	IOWA	PUBLIC BUILDINGS SERVICE...	06	Leased

Figure 33. Find OA List

7. OASIS updates the **Existing OA** and **Existing Documents** sections.
8. In the **Reduce Space Details** section, select either:
 - **Full Release** If you would like to release all space, parking, and antennas on this OA.
 - **Partial Release** If you would like to release a portion of the space or parking on this OA.
9. Enter the expected **Effective Date** of the release.

Existing OA

OA ID	ADC00005	OA Name	ADC00005
Primary Location	\Locations\POSTAL SQUARE		
Address	2 MASSACHUSETTS AVE NE	City	WASHINGTON
State/Province	DISTRICT OF COLUMBIA	Region	11

Find
Remove

Existing Documents

Document Name	Document Number	Document Status	Rev...	Revision Date
Pre-Approval Snapshot - ADC00005 - 300 - 03-14-2023.pdf		Work In Progress	0.0	03/14/2023 01:22 PM

Items per page: 10 1 - 1 of 1 items

↺
↓
⚙

1 of 1 pages
↻

Reduce Space Details

Actual square footage to be released will be calculated by GSA

Release Type

Full Release
 Partial Release

Effective Date

Find
Remove

Spaces to Release

Parking, Antennas, & Zero Sqft Items to Release

Find
Remove

Figure 34. Updated Existing OA, Existing Documents, and Reduce Space Details of Submit Request Form

10. If you select **Full Release**, OASIS displays the OA's associated spaces and zero square foot items under the **Spaces to Release** and **Parking, Antennas, & Zero Sqft Items to Release** sections.

If you select **Partial Release**, OASIS will not display the OA's associated spaces and zero square foot items, but you can click **FIND** on the Spaces to Release Section IF you know which spaces you wish to and click on the radio button next to the space(s) you wish to release and click OK. This step is NOT required. If you do not know the affected space ID skip this step.

Reduce Space Details

Actual square footage to be released will be calculated by GSA

Release Type Full Release Partial Release

Effective Date

Spaces to Release

Space ID	Space Name	Space Class	Area	Parent Building	Parent Floor
1070220	35412	INS	2182.3 square-feet	POSTAL SQUARE	Basement 001
1070227	40712	FDS	173.14 square-feet	POSTAL SQUARE	Floor 001
1070231	40711	PTL	91.26 square-feet	POSTAL SQUARE	Basement 001
1070239	16095	TTO	2994.96 square-feet	POSTAL SQUARE	Floor 001

Items per page: 10 | 1 - 4 of 4 items | 1 of 1 pages

Parking, Antennas, & Zero Sqft Items to Release

ID	Name	Asset Category	Spec Name	Primary Location
EQ-1012179	STPK00001	01 - Assigned	Structured Parking	\\Locations\POSTAL SQUARE
EQ-1012183	STPK00002	01 - Assigned	Structured Parking	\\Locations\POSTAL SQUARE
EQ-1012186	STPK00003	01 - Assigned	Structured Parking	\\Locations\POSTAL SQUARE
EQ-1012189	STPK00004	01 - Assigned	Structured Parking	\\Locations\POSTAL SQUARE

Figure 35. Reduce Space Details - Submit Request Form

11. In the **Describe Your Request** section, enter a description of your release; this field is mandatory.

- For a Full Release simple enter Full Release and any relevant information if needed to explain cancellation rights, moving information, etc.
- For a Partial Release enter a description of the space you are releasing with enough information for GSA to identify the space. Examples include SW suite on the 8th floor, Bob Smith's office on floor 13, Room 8923, etc. There may be additional communication with GSA to confirm the exact space to be released.

The screenshot shows two sections of a web form. The top section, titled 'Describe Your Request', contains a large, empty text input field. Below it is the 'Related Documents' section, which features a table with columns for Document Name, Document Number, Document Status, Revision, Revision Date, and File Name. The table currently displays 'No data to display'. To the right of the table are buttons for 'Remove' and 'Upload', and below them are 'Apply Filters' and 'Clear Filters' buttons along with refresh and settings icons.

Figure 36 Describe Your Request and Related Documents Sections - Submit Request Form

12. Click **Submit Request** at the top of the screen to send the request to GSA for review. To cancel the request, click **Delete** (note: a request cannot be canceled after it has been submitted). To save the request and continue working or to save it to complete later, click **Save** or **Save & Close**.

The screenshot shows the top menu of the 'Submit Request' form. At the top left, there is a breadcrumb 'Home / Submit Request'. To the right are links for 'Print', 'Open In New Window', 'Add to Bookmarks', and 'My Bookmarks'. Below these is a dark grey menu bar with four buttons: 'Save', 'Save & Close', 'Submit Request', and 'Delete'. The 'Submit Request' button is highlighted with a red box. Below the menu bar is a 'General' section with fields for 'Request ID' (C1000822), 'Service Request' (Reduce Space), and 'Status' (Draft).

Figure 37. Submit Request Form Top Menu

13. After you submit your request, it's routed to GSA for review.

You can monitor the request's progress via the **In Progress Requests** link on your **Customer Portal**. Use the filters to list all your agency's **Reduce Space** requests. You will see various statuses, depending on whether the space is cancelable and whether it's owned or leased. It is important to update your GSA Project Manager if there is any change in your move out date during the process.

Activity	Status
GSA reviews the request to confirm it meets the Pricing Policy criteria	GSA Confirmed
Owned Partial Releases go through an SDM review to identify and confirm the spaces to be released	SDM Verified
When GSA has completed all review steps and approves the OA	GSA Approved
Move Out is Confirmed	Completed

The screenshot displays a web interface for a 'Reduce Space' request. At the top, the request ID is C1000146. The status is 'GSA Approved', which is highlighted with a red box. The process status is 'Updates Complete'. Below this, the 'Details' section shows the request is for 'Me' (selected) and 'Owned' (selected). The 'Requested By' section lists Logan Noll. The 'Update Square Footage' section is collapsed. The 'Existing OA' section shows details for ACA00292, including the location: FEDERAL BUILDING - 801 I ST., 333 C Street, CALIFORNIA, ACTON, 09. The 'Existing Documents' section is also collapsed. At the bottom right, there are icons for refresh, star, and download.

Figure 38. Approved Release of Space Request

14. If GSA rejects the request, the request status updates to **Rejected**. The reason(s) for rejection will be listed in the Request Rejected section under reason. In this example, the reason for rejection is that the space is not marketable.

The screenshot displays a web interface for a rejected space request. The 'Request Rejected' section is highlighted with a red box, showing a 'Rejection Comment' that reads 'Rejection details are entered here'. Below this, the 'Reason' section is also highlighted with a red box, listing 'Space is not marketable'. The interface includes a table with one item, 'Request ID C1000220', 'Service Request Reduce Space', and 'Status Rejected'. The 'Details' section shows radio buttons for 'OA Type' (Leased, Owned) and 'Request is for' (Me, Someone Else). The 'Requested By' section lists 'Logan Noll' with work phone and email. The 'Existing OA' section lists 'ACA00292' with primary location and address.

Request ID	Service Request	Status
C1000220	Reduce Space	Rejected

Details

OA Type: Leased Owned
Request is for: Me Someone Else

Requested By

Name: Logan Noll
Work Phone:
Email: logan.noll@gsa.gov

Existing OA

OA ID: ACA00292
OA Name: ACA00292
Primary Location: \Locations\FEDERAL BUILDING - 801 I ST.
Address: 333 C Street
City: ACTON

Figure 39. Rejected Release of Space Request

5: Ask a Billing Question

OASIS allows you to submit billing questions on any of your OAs, as easily as sending an email. The difference is that your questions are trackable, viewable by all your agency's OASIS users, and GSA's responses are provided and stored right in the system for audit and history. GSA prefers that all questions pertaining to specific OAs be submitted using this feature. This ensures your question is directed to the right place and GSA will have metrics on response times.

This chapter outlines the steps for submitting a billing question.

1. From the **Customer Portal**, click **Submit Request**. OASIS displays the **Submit Request** form.

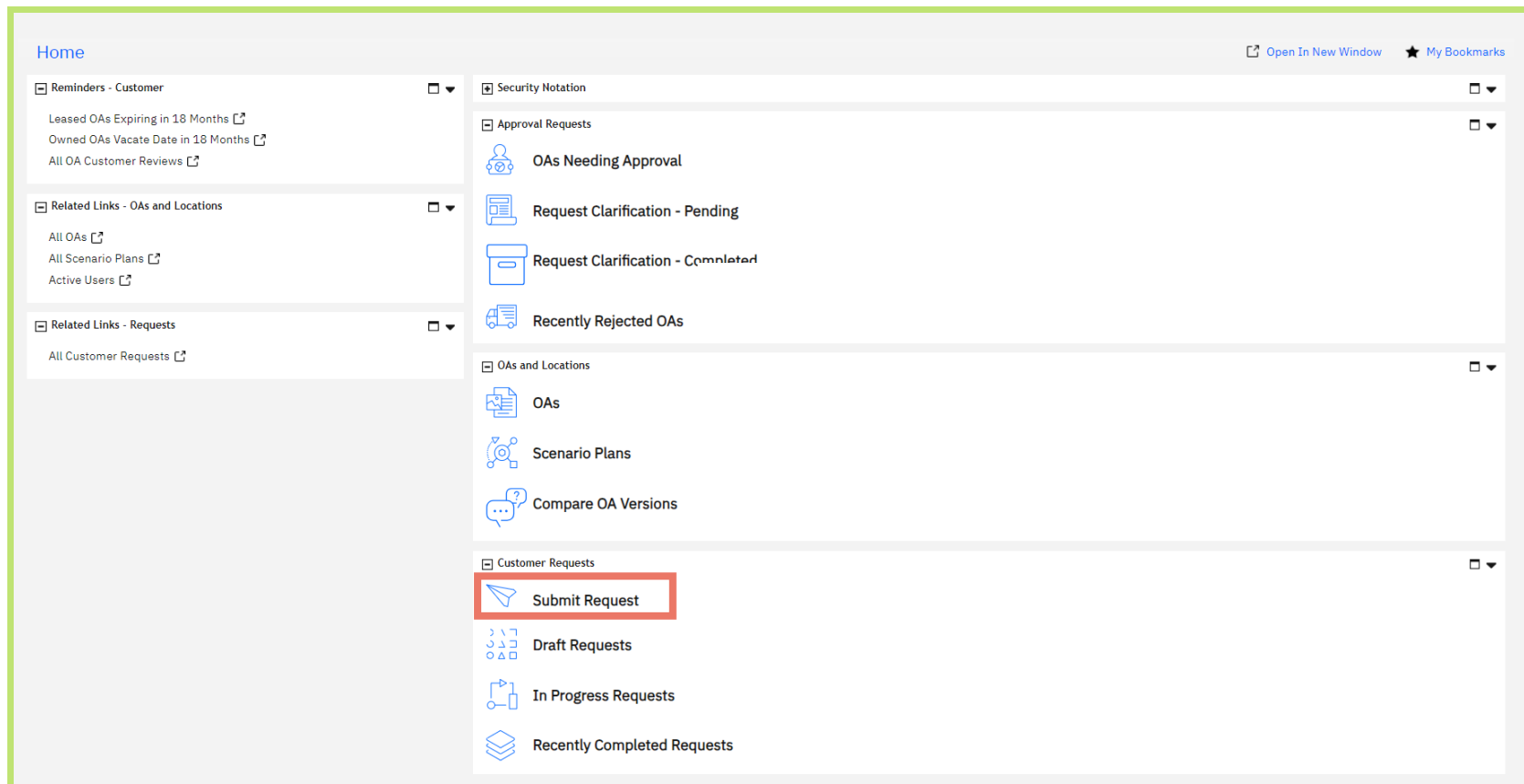


Figure 40. Customer Portal Home Page

1. In the **Details** section, select whether the OA is **Leased** or **Owned**.
2. Select who the request is for; the questions defaults to 'Me.' (See Appendix C if you need to submit the request on Someone Else's behalf).
3. In the **Service Request** section, select **Billing Question**.
4. In the **Existing OA** section, click **Find**.
5. In the **Details** section, select whether the OA is **Leased** or **Owned**.

Home / Submit Request

Print Open In New Window Add to Bookmarks My Bookmarks

Save Save & Close Submit Request Delete

General

Request ID C1000821 Service Request Status Draft

Details

OA Type Leased Owned Request is Me Someone Else

Service Request

Name	Description
<input type="radio"/> Billing Question	Ask a question about my bill
<input type="radio"/> Reduce Space	Initiated by the customer to start reduction in space action

Items per page: 10 1 - 2 of 2 items 1 of 1 pages

Existing OA

Find Remove

OA ID OA Name

Primary Location

Address City

State/Province Region

Existing Documents

Figure 41. Submit Request Form

6. OASIS displays a list of your agency's OAs. Select the radio button to the left of the applicable OA, then click **OK** ✓ near the top right to close the popup.

NOTE: OAs will only appear on the list if they were billing July 2023 or later. OAs that closed in our prior system will not appear on the list and a billing question cannot be submitted for these OAs.

ID	Name	Location ID	Address	City	StateProv	Tenant
<input checked="" type="radio"/> ADC0005	ADC0005	DC0011	2 MASSACHUSETTS AVE ...	WASHINGTON	DISTRICT OF COLUMBIA	PUBLIC BUILDINGS SERV...
<input type="radio"/> AGA00403	AGA00403	GA1007	100 Alabama St SW	ATLANTA	GEORGIA	PUBLIC BUILDINGS SERV...
<input type="radio"/> AGA03448	AGA03448	GA1007	100 Alabama St SW	ATLANTA	GEORGIA	PUBLIC BUILDINGS SERV...
<input type="radio"/> AGA04276	AGA04276	GA2302	300 MULBERRY ST	MACON	GEORGIA	PUBLIC BUILDINGS SERV...
<input type="radio"/> AGU00584	AGU00584	GU7008	W Soledad Ave 520 WEST ...	HAGATNA	GUAM	PUBLIC BUILDINGS SERV...
<input type="radio"/> AIA02799	AIA02799	IA1543	800 2nd St SE City Lot 44	CEDAR RAPIDS	IOWA	PUBLIC BUILDINGS SERV...

Figure 42. Your Agency's OAs

7. OASIS updates the **Existing OA** and **Existing Documents** sections. In the **Topic** section, select one or more subjects of your question. Choose from: **I do not occupy this space**, **Wrong AB code**, **OA Effective date**, **OA Expiration Date**, **Specific Rates**, **Parking**, **Antennas**, or **Other**. If your question is about **Specific Rates**, go to the next step, otherwise skip to **Step 9**.

The screenshot displays the OASIS Billing Question Request Form. At the top, there is a breadcrumb "Home /". Below it is a table with two columns: "Name" and "Description". The first row is selected with a radio button and contains "Billing Question" and "Ask a question about my bill". The second row is "Reduce Space" with the description "Initiated by the customer to start reduction in space action". Below this table is a pagination bar showing "Items per page: 10" and "1 - 2 of 2 items".

The "Existing OA" section is expanded, showing a table with fields for OA ID, Primary Location, Address, State/Province, OA Name, City, and Region. The values are: OA ID: ADC00005, Primary Location: \Locations\POSTAL SQUARE, Address: 2 MASSACHUSETTS AVE NE, State/Province: DISTRICT OF COLUMBIA, OA Name: ADC00005, City: WASHINGTON, Region: 11. There are "Find" and "Remove" buttons to the right.

The "Existing Documents" section is expanded, showing a table with columns: Document Name, Document Number, Document Status, Revi..., and Revision Date. The first row is "Pre-Approval Snapshot - ADC00005 - 300 - 03-14-2023.pdf", Document Number: (blank), Document Status: Work In Progress, Revi...: 0.0, and Revision Date: 03/14/2023 01:22 PM. There are "Refresh", "Download", and "Settings" icons to the right. Below the table is a pagination bar showing "Items per page: 10" and "1 - 1 of 1 items".

The "Topic" section is expanded, showing a table with columns: Name and a numerical value. The rows are: "I do not occupy this space" (0), "Wrong AB code" (1), "OA Effective Date" (2), "OA Expiration Date" (3), "Specific Rates" (4), "Parking" (5), and "Antennas" (6). There are "Refresh", "Download", and "Settings" icons to the right.

Figure 43. Billing Question Request Form Updated with OA Information

8. OASIS displays the **Specific Rate Types** section which allows you to select rates from five different categories. See the next screenshot for additional information about each Specific Rate Type.

The screenshot displays a web interface for a Billing Question Request Form. At the top, there is a 'Topic' section with a list of categories. The 'Specific Rates' category is selected with a checkmark. Below this, the 'Specific Rate Types' section is expanded, showing a 'Payment Group' section with radio button options: FIT, Primary Rates (selected), Unique, Billing Adjustments, and Reimbursable Services. Below the radio buttons is a list of specific rate types, each with a checkbox:

Rate Type
<input type="checkbox"/> 010 Shell Rental Rate General
<input type="checkbox"/> 013 Shell Rental Rate GNS TFC
<input type="checkbox"/> 020 Tenant Improvement Used
<input type="checkbox"/> 030 Operating Costs

Figure 44. Billing Question Request Form - Rate Types Expanded

FIT Rates		
FFE - Furniture, Fixture and Equipment	ITC - IT - Commodities	ITW - IT - Wiring
Primary Rates		
010 Shell Rental Rate General 030 Operating Costs 040 Real Estate Taxes	013 Shell Rental Rate GNS TFC 031 Other Contract Services 101 Security Services Building Specific Amortized Capital - Lessor	020 Tenant Improvement Used 036 Operating Cost GNS TFC 120 Structure Parking
Unique		
011 Shell Rental Rate Warehouse 033 Maintenance and Repair 060 GSA Installed Building Improvements 142 Bridge 145 Railroad Crossing	012 Shell Rental Rate Unique 034 Utilities 102 Security Services Building Specific Amortized Capital - GSA 143 Land 146 Wareyard	032 Cleaning 035 Operating Cost Warehouse 141 Boat Dock 144 Other
Billing Adjustments		
BA001 Broker Commission Credit BA004 Lessor Claim BA007 Total Workplace BA020 Tenant Improvement Used BA032 Cleaning BA060 GSA Installed Building Improvements BA120 Structured Parking BA141 Boat Dock BA144 Other BA150 PBS Fee BAITC - IT – Commodities	BA002 Rent Free Period BA005 Rent Exemption BA008 Other BA030 Operating Costs BA033 Maintenance and Repair BA061 Unamortized GSA Installed Building Improvements BA130 Surface Parking BA142 Bridge BA145 Railroad Crossing BA250 Antenna Charges BAITW - IT – Wiring	BA003 Agency Funded Shell BA006 Forced Move BA010 Shell Rental Rate BA031 Other Contract Services BA034 Utilities BA100 Security Services Building Specific Amortized Capital BA140 Rent Charges for Other Space BA143 Land BA146 Wareyard BAFFE - Furniture, Fixture and Equipment
Reimbursable Services		
RWA01-Enhanced Custodial Services RWA04-Overtime Utilities – Gas RWA07-Overtime Utilities – Coal RWA10-Reimbursable RWA Fee	RWA02-Mechanical O&M HVAC RWA05-Overtime Utilities - Electricity RWA08-Overtime Utilities – Oil	RWA03-Mechanical O&M Other RWA06-Overtime Utilities - Chilled Water RWA09-Overtime Utilities – Steam

Table 1. Specific Rate Types

9. In the **Describe Your Request** section, enter your specific billing question for GSA to review.
10. In the **Contact Information** section, enter the **Name**, **Email** address, and **Phone** number for your agency's point of contact for the question. If your agency has been working with a specific **GSA Contact**, enter that person's name, otherwise leave it blank.
11. Click **Submit Request** at the top of the screen to send the question to GSA. To cancel the question, click **Delete** (note: a question cannot be canceled after it has been submitted). To save the question and continue working or to save it to complete later, click **Save** or **Save & Continue**.

The screenshot displays a web form with three main sections highlighted by red boxes:

- Describe Your Request:** A large empty text area for entering the billing question.
- Contact Information:** A section containing input fields for Name (Logan Noll), Email (logan.noll@gsa.gov), Phone (123-456-7890), and GSA Contact (John Doe).
- Related Documents:** A table listing uploaded documents.

<input type="checkbox"/>	!	Document Name	Document Number	Document Status	Revision	Revision Date	File Name
<input type="checkbox"/>		Sample Document Upload.pdf		Work In Progress	0.0	08/04/2022 16:59:37	Sample Document Upload.pdf

At the bottom of the Related Documents section, there is a pagination control showing "Items per page: 10" and "1 - 1 of 1 items".

Figure 45. Billing Request Form - Describe Your Request and Related Documents Sections

6: Compare OA Versions

Compare OA Versions

The Compare OA Versions feature allows you to display two different versions of the same OA side by side to compare various components more easily, such as square footages, rates, parking/antennas, and dates. Only different versions of the same OA can be compared; versions from different OAs cannot be compared using this feature. Note: If a user has multiple AB Codes all OAS may not be available.

This chapter provides instructions to compare OA Versions.

1. From the **Customer Portal**, click **Compare OA Versions**. OASIS displays the Compare OA Versions screen.

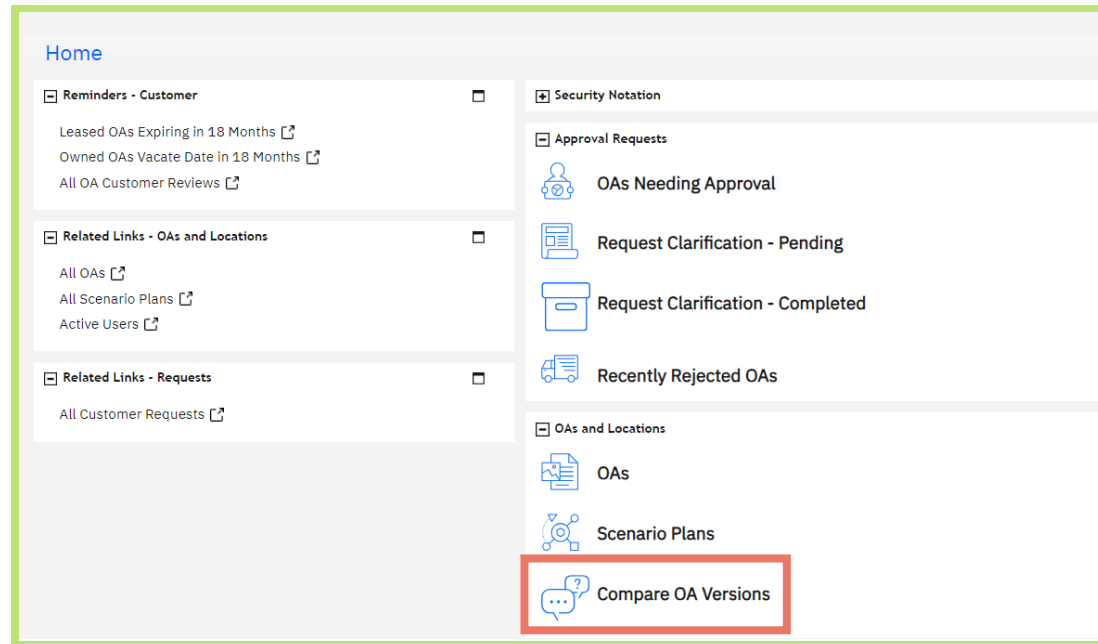


Figure 46 Customer Portal Home Page

2. First, select the **Occupancy Agreement**. Either type the OA number into the **Occupancy Agreement** field or click the magnifying glass icon to select an OA. OASIS displays an OA selection screen.

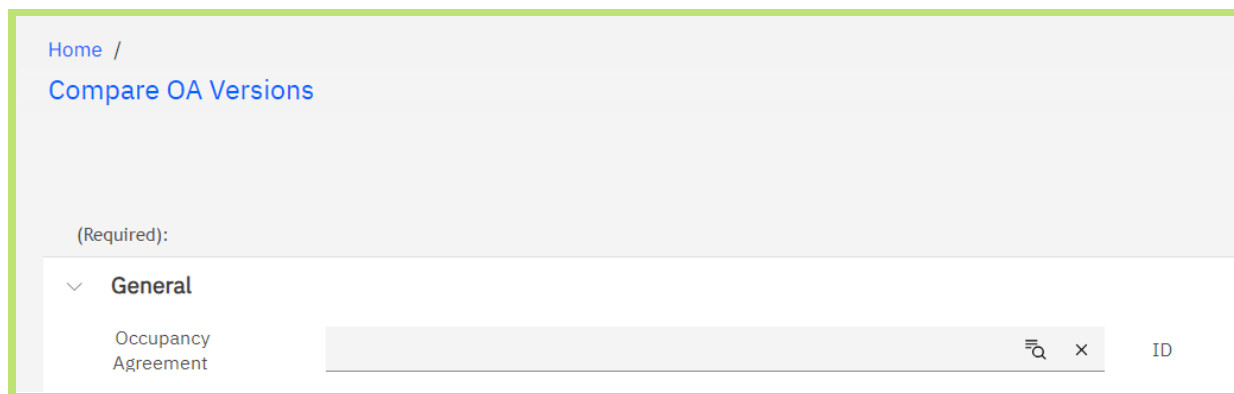


Figure 47. Compare OA Versions - Upper Screen

- Use the filters to find your OA. Note that the **Revision** column shows the current revision number for each OA. If the number is 300, there is only one version available, so comparison is not needed. Click the radio button to the left of the desired OA number then click **OK** ✓ in the upper right.

OA Number	Revision	OA Type
<input type="radio"/> AAK00744	301	Owned
<input type="radio"/> AAK00842	300	Owned
<input type="radio"/> AAK03333	300	Owned
<input type="radio"/> AAK03334	300	Owned
<input type="radio"/> AAK03722	300	Owned
<input type="radio"/> AAK03964	300	Owned

Figure 48. Select OA

- OASIS displays the selected OA number and provides a clickable link to the OA record.
- Select the first revision to compare by clicking the magnifying glass next to **Comparison 1**.
- OASIS displays a list of revisions available for comparison for the selected OA. Click the radio button to the left of the desired revision number, then click **OK** ✓ in the upper right.

Home / Compare OA Versions

(Required):

General

Occupancy Agreement ID 1003995

Summary

Comparison 1 Comparison 2

Amendment Reason

Figure 49. Compare OA Version – OA Selected

7. Repeat the steps to select the **Comparison 2** version.
8. Scroll down to review the differences between the billing components. See Figures Figure 5 and Figure for an example.
9. Click **Close** in the upper right to return to the **Customer Portal**.

The screenshot displays two side-by-side panels for comparing OA versions. Both panels show 'General Data' and 'Sqft' sections.

General Data Comparison:

AB Code	Escalation Month	OA Term
4766	1... 0...	5 Years 11 Months 4 Weeks 1 Day

Sqft Comparison:

Name	Rentable (lease)	Usable (lease)	Effective Start	Effective End	Current Use Space Class
4487639	131.84 square-feet	131.84 square-feet	10/02/2022	09/30/2028	TTO
4487485	166.8 square-feet	166.8 square-feet	10/02/2022	09/30/2028	TTO
4487612	241.09 square-feet	241.09 square-feet	10/02/2022	09/30/2028	TTO
4487488	200.83 square-feet	200.83 square-feet	10/02/2022	09/30/2028	TTO
4487625	254.07 square-feet	254.07 square-feet	10/02/2022	09/30/2028	TTO
4487622	133.72 square-feet	133.72 square-feet	10/02/2022	09/30/2028	TTO
4487604	206.58 square-feet	206.58 square-feet	10/02/2022	09/30/2028	TTO
4487638	183.84 square-feet	183.84 square-feet	10/02/2022	09/30/2028	TTO
4487645	545.69 square-feet	545.69 square-feet	10/02/2022	09/30/2028	TTO
4487484	241.63 square-feet	241.63 square-feet	10/02/2022	09/30/2028	TTO

Figure 50. Compare OA Versions - General and Square Footage Data

Payments				
Payment Type	Start D...	End Date	Amount pe...	Status
010 Shell Rental Rate General	12/01/2022	09/30/2028	\$37,375.08	Scheduled
030 Operating Costs	12/01/2022	09/30/2023	\$21,699.84	Scheduled
102 Security Services Building...	12/01/2022	09/30/2023	\$86.64	Scheduled
130 Surface Parking	12/01/2022	09/30/2023	\$1,316.88	Scheduled
160 Pro Rata Joint Use Charg...	12/01/2022	09/30/2023	\$857.52	Scheduled
180 Pro Rata Joint Use Charg...	12/01/2022	09/30/2023	\$69.48	Scheduled

Items per page: 20 | 1 - 6 of 6 items | 1 of 1 pages

Parking and Antennas		
Antennas	Surface Parking	Structure Parking
0	2	0

Items per page: 20 | 1 - 1 of 1 items | 1 of 1 pages

Payments				
Payment Type	Start Date	End Date	Amount ...	Status
010 Shell Rental Rate General	12/01/2022	09/30/2028	\$37,375.08	Scheduled
030 Operating Costs	12/01/2022	09/30/2023	\$21,699.84	Scheduled
102 Security Services Building Specific Amortized C...	12/01/2022	09/30/2023	\$86.64	Scheduled
130 Surface Parking	12/01/2022	09/30/2023	\$1,316.88	Scheduled
160 Pro Rata Joint Use Charges Building Amenities	12/01/2022	09/30/2023	\$857.52	Scheduled
180 Pro Rata Joint Use Charges Surface Parking	12/01/2022	09/30/2023	\$69.48	Scheduled
010 Shell Rental Rate General	07/01/2023	09/30/2028	\$42,335.40	Pending
030 Operating Costs	07/01/2023	09/30/2023	\$24,579.72	Pending
102 Security Services Building Specific Amortized C...	07/01/2023	09/30/2023	\$99.36	Pending

Items per page: 20 | 1 - 9 of 9 items | 1 of 1 pages

Parking and Antennas		
Antennas	Surface Parking	Structure Parking
0	2	0

Items per page: 20 | 1 - 1 of 1 items | 1 of 1 pages

Figure 51. Compare OA Versions - Payments and Parking and Antennas Data

7: View Scenario Plans

Scenario plans are provided for projects that affect owned OAs. This includes space being released or expanded, entire floor renovations, and project planning for brand new space. For each situation, GSA's Spatial Data Management team creates a scenario plan to reflect these changes, which generates an associated design option and floor plan. Many design options may exist for one OA, especially during the project planning phase. Although you can view design options in OASIS, the communication of your preferred design option selection takes place outside of OASIS, with the project team. The selected design option becomes the basis of a new or modified OA, and that is where you see and approve the space. You can view the scenario plan that was used to create your OA.

Note- Owned OAs that were created in our prior OA system and migrated to OASIS will not have scenario plans.

This chapter will walk through the steps to view available scenario plans.

1. From the **Customer Portal**, click **Scenario Plans**. OASIS displays a list of your agency's **Active Agency Scenario Plans**.

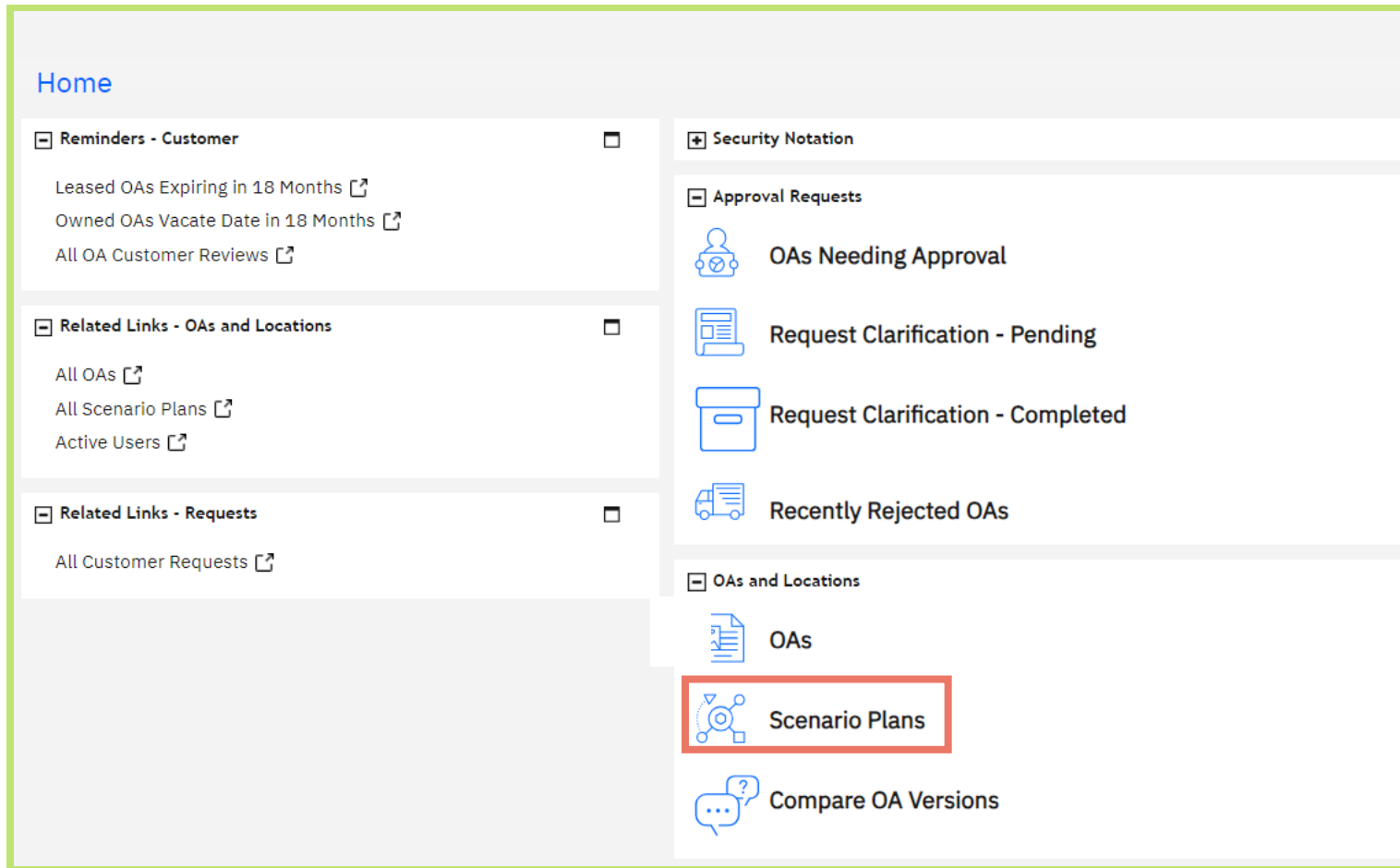


Figure 52. Customer Portal Home Page

2. If needed, use the filters to find the desired scenario plan. Click anywhere on the line to open the plan.

The screenshot shows a web interface for 'All Agency Scenario Plans - My Organization'. At the top, there are navigation links: 'Home / All Agency Scenario Plans - My Organization', 'Open In New Window', 'Add to Bookmarks', and 'My Bookmarks'. Below the header, there are filter controls: 'Apply Filters', 'Clear Filters', and icons for refresh, download, and settings. The main content is a table with the following data:

ID	Name	Description	Status
<input type="text" value="Contains"/>	<input type="text" value="Contains"/>	<input type="text" value="Contains"/>	<input type="text" value="Contains"/>
1000080	ab4766 pbs new occ	1st floor	Active
1000149	JD AMI 01628 RELEASE O...	JD AMI 01628 RELEASE ONE PARKING SPACE	Draft
1000257	New OA for AB4766	Test for creating new OA	Completed

Figure 53. Active Agency Scenario Plans List

3. The Scenario Plan displays general information, including existing OA information if relevant. To view the individual design options, scroll to the bottom of the screen and click anywhere on the line, under the Design Options section. OASIS opens the design option.

The screenshot shows the 'Design Options' section for a scenario plan. It features a table with the following data:

ID	Name	Description
1000285	New OA for AB4766	Test for creating new OA

Below the table, there are pagination controls: 'Items per page: 10' and '1 - 1 of 1 items'.

Figure 54. Agency Scenario Plan

- The design option contains similar information to the Scenario Plan, plus details about relevant floors and zero square footage items such as parking and antennas at the bottom of the screen (not shown). To view associated floorplans, click the **Notes & Documents** tab at the top.

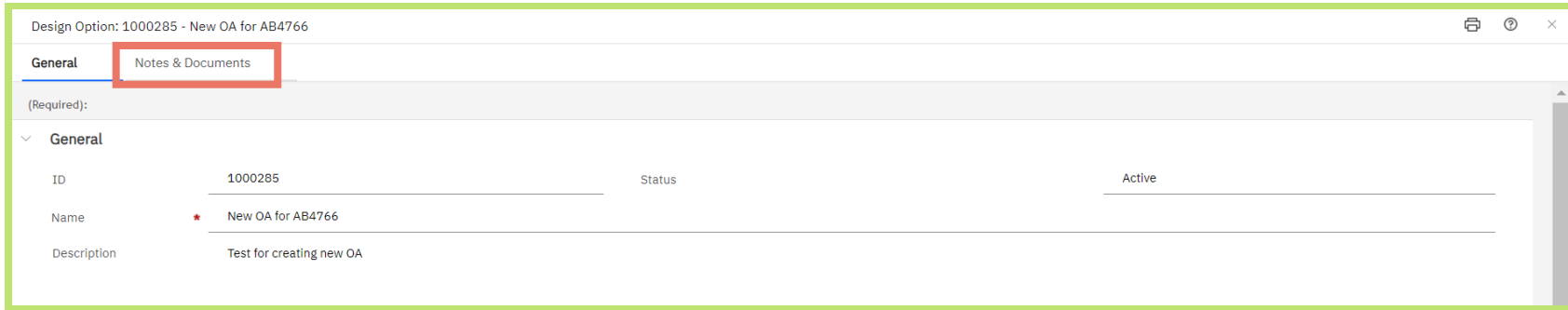


Figure 55. Design Option - Upper Screen

- Comments from GSA appear in the top part of the screen, and any associated documents, including the floorplan, appear in the lower portion of the screen. Click anywhere on the document row to open it. OASIS opens the document in a separate window (See Figure 57). From here you can zoom in or out of the floorplan, download it, and print it. In this example, affected spaces are highlighted in a different color.

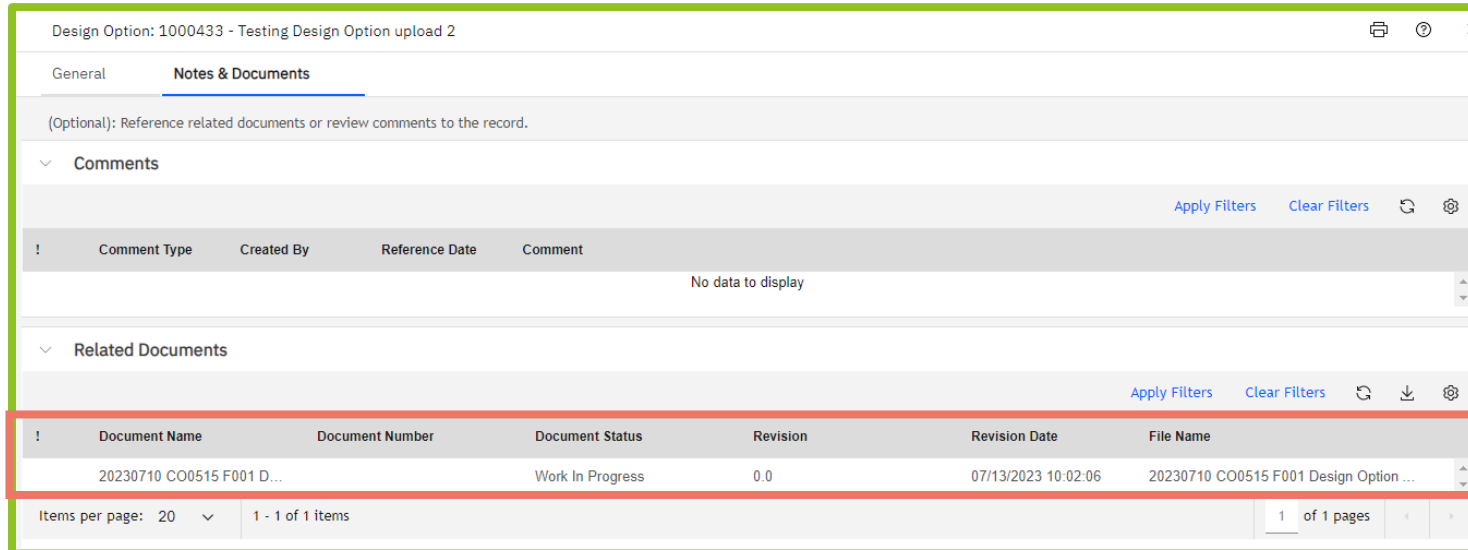


Figure 56. Design Option Notes & Documents Tab

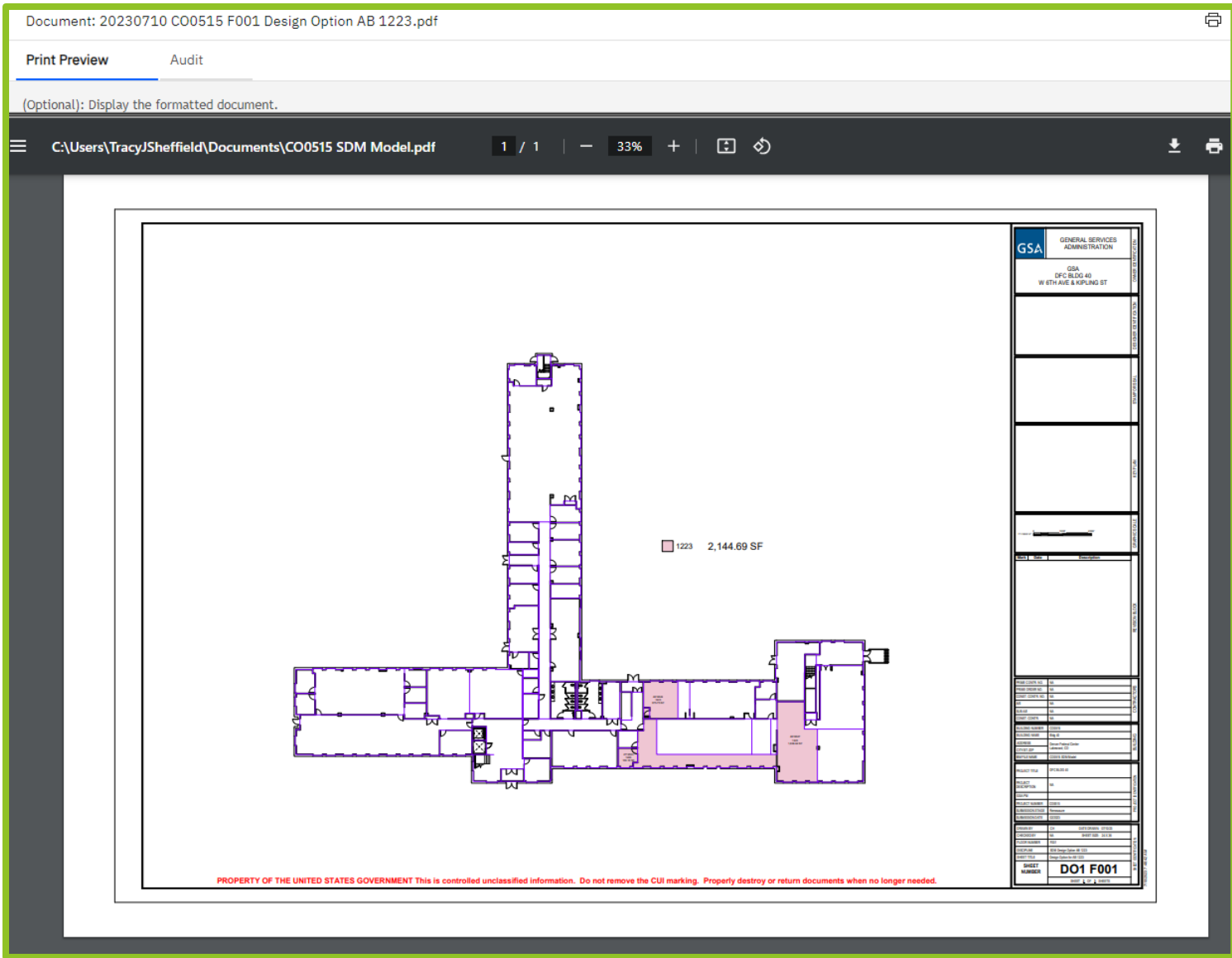


Figure 57. Design Option Floorplan Example

Appendix A - Uploading Documents

When you are submitting a billing question or request to release space, you may want to attach one or more documents. This section explains the steps to upload documents. Documents are uploaded in the **Related Documents** section, at the bottom of the form.

1. Click the **Upload** button in the upper right corner of the **Related Documents** section at the bottom of the **Submit Request** screen.

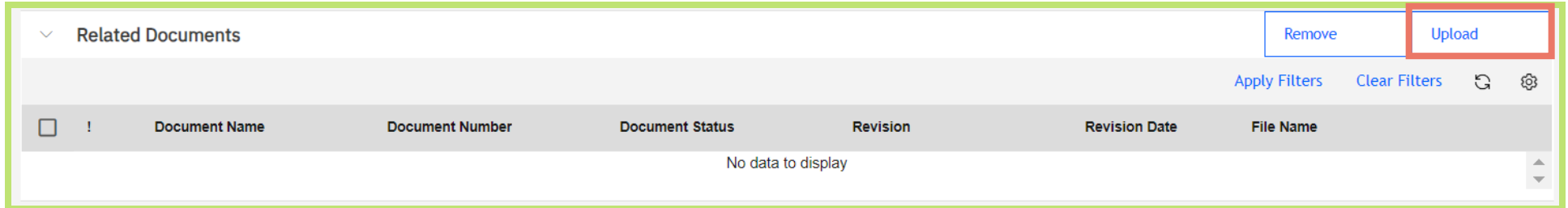


Figure 58. Submit Request Screen

2. OASIS displays the **Upload Files** screen. Click either **Single Upload** in the upper right or **Select Multiple Files for Upload** in the bottom left. Navigate to your file(s), then click **Open**. You can also drag and drop files from your computer directly onto the screen.
3. OASIS displays the **Upload Files** screen. Click either **Single Upload** in the upper right or **Select Multiple Files for Upload** in the bottom left. Navigate to your file(s), then click **Open**. You can also drag and drop files from your computer directly onto the screen.
4. Once you've selected your files, OASIS brings you back to the **Upload Files** screen. Click the **Submit** button at the bottom left to attach the file to your request.

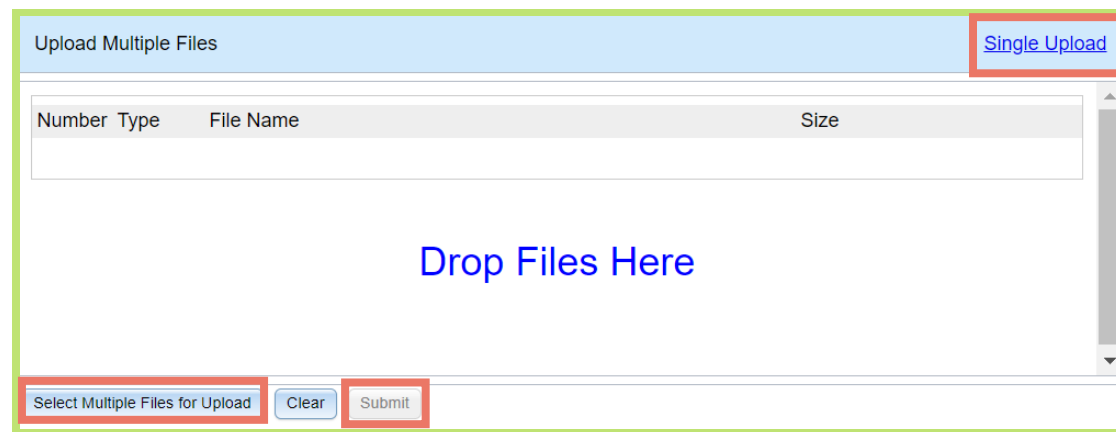


Figure 59. Upload Files Screen

Appendix B - OA Summary Report

The OA Summary is found in several different locations depending on the OA status:

1. On any OA record, the OA Summary can be generating by going to Reports tab.
 - From there the document can be viewed, exported, printed, or saved.
2. An OA that is currently with the Customer for Review will have a Pre-approved Snapshot of the OA reflecting the terms and conditions for that specific review.
 - This can be found as a link in the Approval Form (see Chapter 3) or on the Notes and Documents tab of the OA.
3. An OA that has been approved by the Customer will have a Post-approval Snapshot of the OA reflecting the terms and conditions agreed upon and a footer with the name of the Ordering Official who approved the OA.
 - This can be found as a link in the Approval Form (see Chapter 3) or on the Notes and Documents tab of the OA.

The OA Summary has 4 major sections:

1. **General Information** - This contains an overview of the OA information including:
 - OA Number
 - Occupancy Type - Federal or Leased
 - Lease Number if applicable.
 - AB Code and Agency Name
 - Cancellation Rights
 - Revision Number - reflects the number of times this OA has been updated. OAs that were migrated from GSA's previous system receive revision numbers beginning with 300.
 - Amendment Reason - if applicable.

- Customer Identifiers 1,2, &3 - these are fields completed at the agency's discretion to add additional identifying information to the OA.
- Commencement Date - date that the OA was first occupied OR for OAs migrated from GSA's previous system this is the effective date of that migrated version.
- Expiration Date - date the OA will end on leased, owned OAs do not have expiration dates.
- Firm Term - if applicable for leases
- Escalation Month - for lease CPIs, all owned OAs escalate in October.
- Clauses- all OAs contain the GSA standard clause. If applicable to the occupancy a few standard clauses such as Broker Commission Credit or Agency Funded Shell will be included. Individual OA only or agency only clauses will not be added to the OA.

2. Location Information - This contains a summary of your location and space:

- Location ID and Location Name
- Address including City, State, Zip, and GSA Region
- Usable Square Footage - This is your contract square footage that matches your lease agreement (leased) or your measured square footage that matches your SDM measurement drawings (owned).
- Rentable Square Footage - This is your contract rentable square footage that matches your lease agreement (leased) or your location R/U and RSF (owned). This may vary from your billed RSF due to measurement changes or R/U variances in the building that are not passed on to customers.
- R/U - the locations measured rentable over usable factor.
- Structured and Surface Parking Quantity and Antenna Quantity
- RGA Contact - Person at GSA that can assist you with occupancy questions.

3. Financial Section - This contains information on your billed terms:

- PBS Fee Percentage - lease only.
- Shell Rate Section - This section contains information on your shell rate(s). If your occupancy has multiple shell rate schedules each will appear in the table:
 - i. **Description** - if applicable
 - ii. **Expected Cash Amount** - Monthly billed amount.
 - iii. **Amount per year** - Annual amount.
 - iv. **Cost per unit**- Rate per RSF
 - v. **Contract Rentable** - RSF
 - vi. **Start Date and End Date** of the rate.
 - vii. **Pending End Date** - payments schedule is revised to end on the date displayed.
 - viii. **Status** – Scheduled or Pending. Scheduled reflects a customer approved and/or currently billing payment scheduled. Pending reflects an unapproved payment scheduled that is awaiting approval.
- Rates Section- Contain all other non-shell rates in the same table structure as shell.

OA Summary

Financial Information

PBS Fee Percent

5%

Tenant

Improvement	Description	Principal Amount	Expected Cash Amount	Interest Rate	Duration			
Shell Rates	Expected Cash Amount	Amount per Year	Cost per Unit	Contract Rentable	Start Date	End Date	Pending End Date	Status
010 Shell Rental Rate General	\$311,697.80	\$3,740,373.60	\$30.00	124679.12	07/01/2024	05/31/2025		Scheduled
Rates	Expected Cash Amount	Amount per Year	Cost per Unit	Contract Rentable	Start Date	End Date	Pending End Date	Status
030 Operating Costs	\$151,614.90	\$1,819,378.80	\$15.00	121291.92	06/01/2024	05/31/2025		Scheduled
030 Operating Costs	\$155,848.90	\$1,870,186.80	\$15.00	124679.12	07/01/2024	05/31/2025	07/01/2024	Scheduled

Figure 60. Upload Files Screen

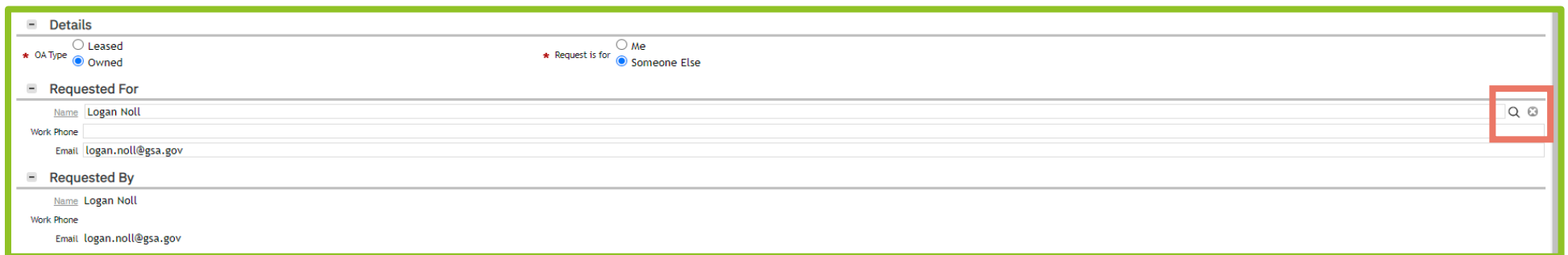
4. **Approval Section** - Blank until the OA is approved by an Ordering Official and contains:

- Name of Approver
- Date, Time

Appendix C - Submitting a Request for Someone Else

OASIS enables you to submit a Release of Space or Billing Question request on someone else's behalf. To use this feature please follow these steps. Please note this option does NOT route to another individual. This option is best used if an action is being routed for someone out of the office and could be useful for customer's internal approval processes.

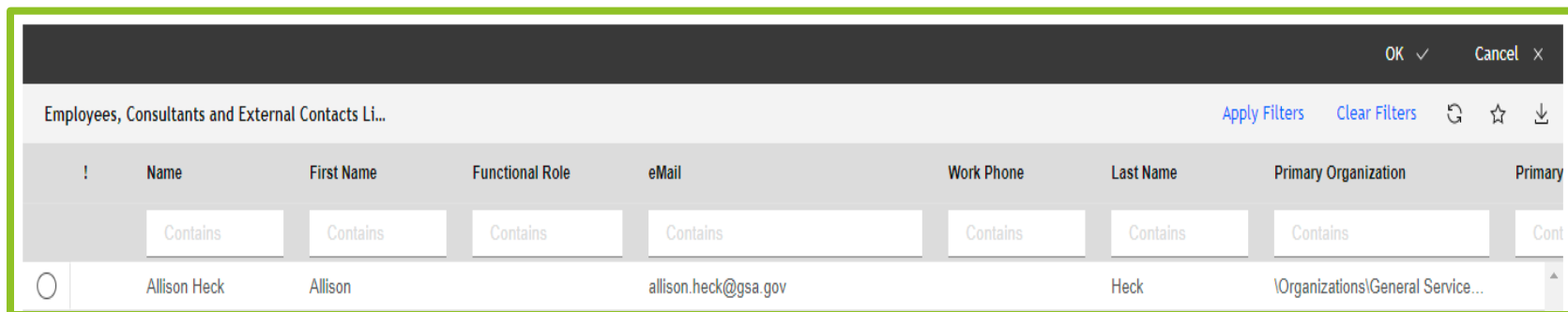
1. Click on **Someone Else** in the Details Section.
2. The **Requested For** section appears.
3. Use the magnifying glass on the far right of the screen (**Error! Reference source not found.**) to see a list of all users in your agency/bureau code (**Error! Reference source not found.**).



The screenshot shows the 'Requested For' section of the OASIS interface. The 'Requested For' section is expanded, showing fields for Name (Logan Noll), Work Phone, and Email (logan.noll@gsa.gov). A magnifying glass icon is highlighted in a red box on the right side of the section.

Figure 61. "Requested For" Section

4. Click the radio button to the left of the name.
5. Click **OK** ✓ near the top right to close the popup. The selected name now appears in the **Requested For** section.



The screenshot shows the 'Requested For' selection screen. The screen displays a table of employees, consultants, and external contacts. The table has columns for Name, First Name, Functional Role, eMail, Work Phone, Last Name, Primary Organization, and Primary. A search bar is visible at the top right, and a magnifying glass icon is highlighted in a red box.

!	Name	First Name	Functional Role	eMail	Work Phone	Last Name	Primary Organization	Primary
<input type="radio"/>	Allison Heck	Allison		allison.heck@gsa.gov		Heck	\Organizations\General Service...	

Figure 62. "Requested For" Selection Screen