INFORMATION NEEDED TO USE THE OSE DATABASE

GENERAL

1. All Agency Users for each Agency can view the same information for their Agency.

2. All projects in the OSE Database will be set up by the OSE Database Administrator.
- **a.** OSE will enter PIP projects when we receive an approved A-1 form.
- **b.** Other projects will be created when a request is received using the link on the OSE Website.

3. Form SE-000 – Project File - Other Uploaded Forms & Information is a place for you and/or OSE to upload information that needs to be in the project file but is not input elsewhere. Some examples of what could be put into this folder include: SE-510 - Flood Plain Permit, Comments from and responses to OSE Project Manager, signed contracts, etc.

4. All documents to be uploaded to the OSE Database must be named appropriately so they can be identified without having to open them.

5. All forms in the OSE Database will have to be either "Approved" or "Acknowledged" by the OSE Project Manager for them to become part of the OSE Database. Approved forms will have the OSE Project Manager's signature on them, and the Acknowledged forms will just have their name typed in.

6. The OSE Manual Appendices will still contain all the OSE Forms; however, OSE will only accept forms through the OSE Database for approval/acknowledgement.

7. If you have any problems or issues with the OSE Database, please contact the OSE Database Administrator.

LOGGING IN

1. When you log in for the first time, you will be asked by the system for permission to send a verification code to the email your account was set up with (this is for dual authentication purposes). Hit "Submit".
- **a.** After you receive your code by email, enter it in the OSE Database and hit "Submit".
- **b.** You will then be taken to "My Dashboard".

2. In the far-left column, go to "My Account" and then to "Add/Change Phone Number". There you can enter a cell phone number and you can then receive your code for dual authentication via text or email.

MY DASHBOARD

1. When you log in, you will be taken directly to "My Dashboard".
- **a.** Any forms needing your attention will be in the left column under "Forms Assigned to Me".
- **b.** All open projects for your Agency will be in the right column under "My Projects".
- **c.** You can search for an open project by entering the project number above the right column.

2. In the far-left column are links to information on your account, your agency projects and other information.

CREATING AND SENDING A FORM

1. Click on the project number for which you want to create a form and then click on "Create" next to the form.

2. All forms will autofill the top 3 lines (Agency, Project Name and Project Number).
- **a.** Other information may also be pulled from a previous form where available.
- **b.** You will not be able to change any of this autofill information.

3. ALL BLANK FIELDS on ALL FORMS must be filled in (except signatures and associated information).
- **a.** If you leave a blank, the system will give you an error message and will not allow you to submit the form. You must go back and fill in the information before you try to submit the form again.
- **b.** You can use "N/A" or "0" if the information is not available to you.

4. Follow Instructions in the Green Shaded Box at the bottom of the form and upload any needed attachments.

5. You can save the form at any time by hitting "Save Draft", or you can send to OSE by hitting "Submit to OSE".

6. After submitting to OSE, the form will show up in the OSE Project Manager's Dashboard for them to act on.

7. Some forms are dependent on other forms to be created.
- **a.** This association, if there is any, will be shown at the top of each form in a blue box.
- **b.** If you have not created the form needed prior to the one you want to create, the system will give you a message at the top of the page telling what form is needed to proceed. (Example: To create an SE-360, you must have an SE-310 that has been approved.)
- **c.** A flow chart showing Form Associations is at the end of this document.

8. OSE Project Managers cannot change your forms. If there is ANY incorrect information on the submitted form or attachments, the OSE Project Manager will reject the form and indicate the reason why.
   a. The rejected form will be returned to your Dashboard as a "Draft".
   b. Go to the Blue Shaded Box at the bottom of the form and under "Workflow History", you will see the Reason for Rejection.
   c. You can then go back into the Draft form, make corrections, and resubmit.
9. All OSE Database forms are available and shown for every project, even if they are not needed or applicable. Only use the forms you need for that project.

RECEIVING FORMS

1. You will no longer receive approved forms by email.
   a. When the OSE Project Manager has acted on a form, you will get an email telling you there is something on your dashboard, the project and form number.
   b. You can then go into the OSE Database, view and/or print your approved/acknowledged form or make corrections and resubmit.
2. Forms that have been approved/acknowledged in the OSE Database cannot be modified. If you have a problem with one, contact the OSE Database Administrator.

FORMS WITH SPECIAL INSTRUCTIONS

1. **Professional Services Amendment Forms (SE-232 & SE-260)**
   a. The Agency will complete Page 2 of the form found on the OSE Website and have it signed by both the A/E and the Agency.
   b. The Agency User will then create Page 1 of the required form in the OSE Database and upload the signed Page 2 along with the A/E proposal.
   c. The OSE Database form will then be submitted to OSE for approval/acknowledgement.
2. **Construction Services Amendment Forms (SE-380, SE-381, SE-480 & SE-780)**
   a. The Agency will complete Page 2 of the form found on the OSE Website and have it signed by the Contractor, A/E, and the Agency. (Only Contractor and Agency will sign the SE-780, Page 2.)
   b. The Agency User will then create Page 1 of the required form in the OSE Database and upload the signed Page 2 along with required back-up information to justify the change.
   c. The OSE Database form will then be submitted to OSE for approval/acknowledgement.
3. **Certificates of Substantial and Final Completion (SE-550 & SE-560)**
   a. The Agency User will complete the form in the OSE Database without submitting it and print it out.
   b. The Agency will then obtain required signatures on the form and upload the signed form (and other attachments, as needed) with the OSE Database form.
   c. The OSE Database form will then be submitted to OSE for acknowledgement.
4. **SCBO Forms (SE-110, SE-210, SE-310, SE-311, SE-410, SE-610, SE-655, SE-710 & SE-810)**
   a. All SCBO forms will be approved by OSE Project Managers the same as other forms in the OSE Database.
   b. Agency Users, upon notification of form approval, can go into the OSE Database to the project, locate the approved form and print it as a pdf document.
   c. You can then email the form to any others who need it (A/E, Contractor, etc.).
   d. The Agency WILL NOT be sent the approved copy of the SCBO form. You must go into the OSE Database to retrieve it.

ADDING AN A/E FIRM OR CONTRACTOR TO OSE DATABASE

1. If an A/E Firm or Contractor does not show up on a pull-down list when you are filling in a form, it means they are not in the OSE Database.
2. To add your firm/company to the OSE Database, you need to contact the OSE Database Administrator and provide them with the following information:
   a. The complete and correct name of the firm/company.
   b. The city and state in which the office you are contracting with is located; and
   c. Whether or not there are multiple office locations so that can be identified in the OSE Database.
3. The OSE Database Administrator will add the firm/company to the OSE Database as soon as possible and you will then be able to find them on the drop-down list when filling out a form.

11/30/2022
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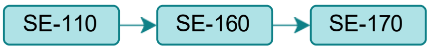
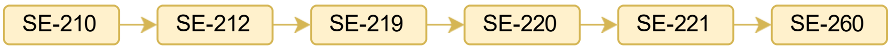
FORM ASSOCIATIONS

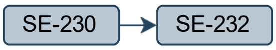
Contractor/Subcontractor Prequalification



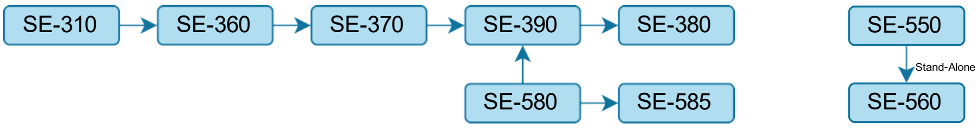
Professional Services



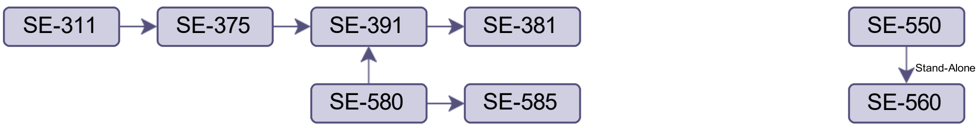
Small Professional Services



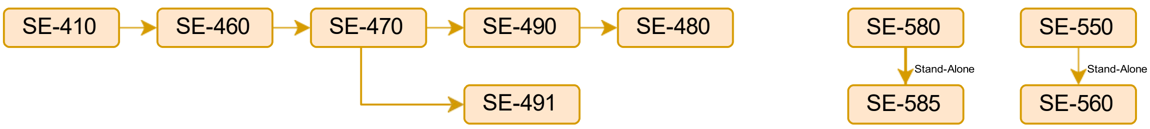
Design-Bid-Build



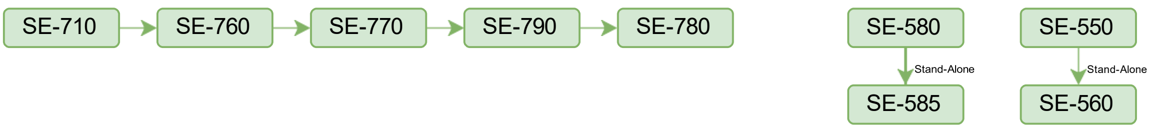
Small Purchase



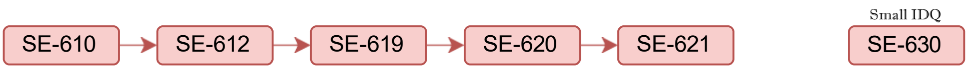
Construction Management at Risk (CM-R)



Design-Build (DBx)



Indefinite Quantity Contracts (IDQ)



Task Order Contracts (TOC)