Massachusetts School Building Authority

Funding Affordable, Sustainable, and Efficient Schools in Partnership with Local Communities

OPMR

Owner's Project Manager Report System

User Guide

Massachusetts School Building Authority
System User Guide

MSBA © September 27, 2023

Introduction

This User Guide is intended to assist Owner's Project Managers (OPMs) in the preparation of monthly OPM reports to be submitted to the Massachusetts School Building Authority (MSBA) via a web application. Once submitted, edits to the monthly report are not permitted. Only one OPM report may be submitted for each reporting period.

The online OPM report allows for the upload of documents. The attachments page details the different uploads required for the OPM report submission.

Note: As we are taking the signed draft OPM report as "Attachment 1" on the attachment page, there is no reason to submit a hard copy of the same to MSBA.

Disclaimer

OPM Report system is not an application for funding. Information gathered through the system and submission of it in no manner commits the MSBA to accept, approve, provide grant or any other kind of funding; it places no obligation or requirement upon the MSBA to do anything.

Only authorized users should have access to this system. All users must ensure the security of their user ID and password and should not share their user ID and/or password with others. All data entered using an MSBA-authorized user ID will be the responsibility of the user to whom the user ID was originally assigned. Unauthorized access to the MSBA OPMR system may result in processing delays.

The MSBA reserves the right to modify this OPMR User Guide and the OPMR system, in part or in its entirety, and to request and obtain additional, follow-up information from the OPM, city, town, or regional school district.

Due Dates

The OPM report must be submitted by the 12th of each month for activities completed in the prior month. Reports submitted after the 12th of the month will be considered late. Please note that you cannot submit your report until the month on which you are reporting has ended. For example, if you would like to submit a report for the month of June, you cannot submit it until July 1st. This report will be due on or before July 12th.

Getting Help

For any questions about the content of the OPM report or any corrections to a previously submitted report, please contact Craig Hovey (Craig.Hovey@MassSchoolBuildings.org).

Images in this User Guide

The images in this User Guide were created by visiting the MSBA website using the Google Chrome web browser. There may be some slight visual differences for users of Internet Explorer, Firefox, or other browsers.

Getting Started

Getting Access to the Application

To get access to this or any other MSBA application, please fill out the Access Request Form, located at http://www.massschoolbuildings.org/guidelines/guides

Sample of the "MSBA website page where access request forms are present" shown below
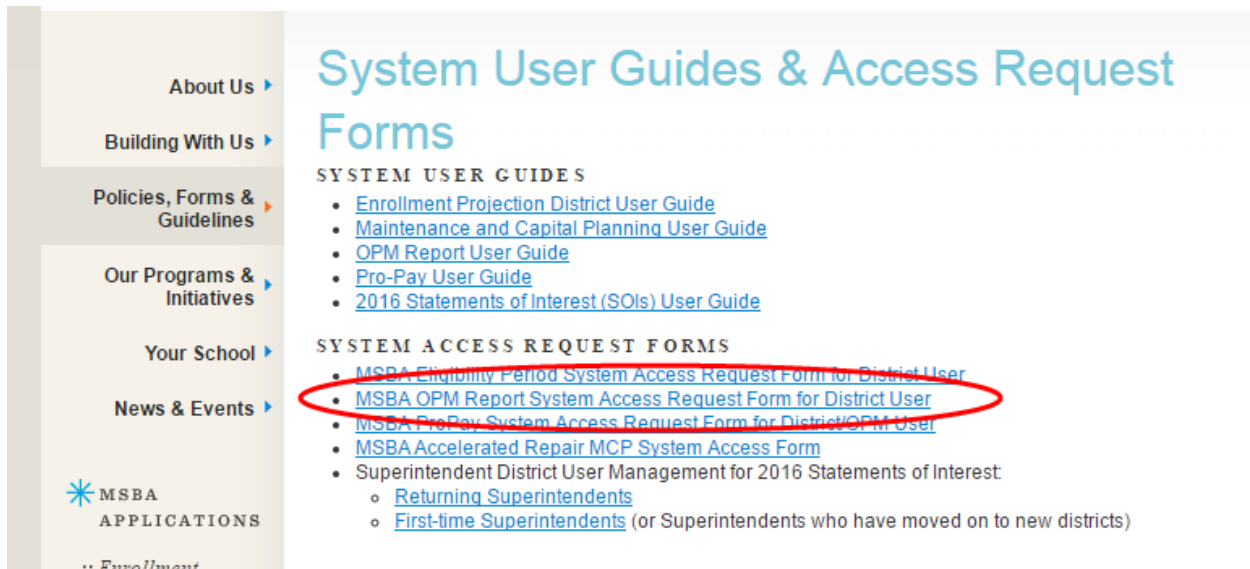
Access Request Forms will need to be completed before access will be granted to any systems. Please print, sign, and return the forms to the MSBA via mail or fax (617-720-5260 or 617-720-8460) or by emailing a PDF to Katie DeCristofaro (Kathryn.Decristofaro@MassSchoolBuildings.org).
Please allow enough time to get the appropriate local signature(s) on the access forms. Most systems require the district superintendent to approve new users.

Usernames and passwords

Use of MSBA systems requires that each individual user in a district have their own unique username and password.

You must request separate access for each individual who will be using the system.

It is recommended that you request a separate account for each of the following people in advance:
- the OPM assigned to the project
- any staff who may be responsible for data entry

NOTE: Users must ensure the security of their user ID and password and should not share their user ID and/or password with others. All data entered using an MSBA-authorized user ID will be the responsibility of the user to whom the user ID was originally assigned.

Logging into Application

To log on to the OPM Report System, click on the following link: http://www.massschoolbuildings.org/

Sample of the MSBA website shown below

Click the "OPM Report" link on the left-hand column of the MSBA website home page to take you to the login screen. You can save the MSBA homepage as a favorite to avoid having to retype the address each time access to the system is required.

Sample of the login page shown below

If you forget either your Username or your Password, you can click on the links highlighted above. Follow the instructions on the pages and your username or password will be e-mailed to you.

First Time Users

When a user logs into the MSBA Systems application for the first time, they will automatically be prompted to change their password. Users should choose a password that can be easily remembered and that adheres to the password guidelines specified on the page. If the user wants to change their password at any time, they can change it by going to "My Accounts" tab on the MSBA systems home page.

Sample of the "My Account" page shown below:

Set new password

Enter old password:
Enter new password:
Confirm the password:

Password must follow these rules:

- *Length between 8 and 20 characters*
- *Contains three of the following:*
  - *At least one upper case letter*
  - *At least one lower case letter*
  - *At least one digit(0-9)*
  - *At least one of these special characters(!@#$%)*

Set Password

Forgot Your Username

If you cannot remember your "Username", click on the **Forgot your username?** link and follow the instructions on the page. The page would look like:

Sample of the "Forgot your Username" page shown below

Forgot your username?

Enter your registered email: john.doe@MassSchoolBuildings.org

Get Username   Cancel

Enter your registered e-Mail and select "Get User Name"

After providing your registered email address, click on "Get Username" and an email notification will automatically be send to your registered email address on file. The format is as shown below. You will also see the message "Your username has been sent to the email address on file" on the page.

We recently received a request to resend this user name to the email address on file.

Your MSBA systems username is as follows:

Username: JDOE

If you made this request, you do not need to do anything further. If you did not make this request, it is recommended that you change your password. You may do this via the "My Account" tab which may be found at [https://systems.MassSchoolBuildings.org].

Please remember that you must ensure the security of your user ID and password and should not share your user ID and/or password with anyone else. All data entered using an MSBA-authorized user ID will be the responsibility of the user to whom the user ID was originally assigned.

Forgot Password

If you cannot remember your password, please click on the **Forgot your password?** link to be directed to the following page:

Sample of the "Forgot your Password" page shown below

Forgot your password?

Enter your user name:	John.Doe
Enter your registered email:	john.doe@MassSchoolBuildings.org
	Get Password Cancel

Enter your User Name and Registered e-Mail and select "Get Password."

After entering your Username and registered e-mail address; click on "Get Password" to receive an automated email which contains your login information (this is shown below). You will also see the message "Your password has been sent to the email address on file" on the page.

We recently received a request to resend this password to the email address on file.

Your MSBA password is as follows:

Password : xxxxxxxx

If you made this request, you do not need to do anything further. If you did not make this request, it is recommended that you change your password. You may do this via the "My Account" tab which may be found at [https://systems.MassSchoolBuildings.org].

Please remember that you must ensure the security of your user ID and password and should not share your user ID and/or password with anyone else. All data entered using an MSBA-authorized user ID will be the responsibility of the user to whom the user ID was originally assigned.

MSBA Applications Availability

Regular maintenance can be performed on MSBA Applications on Thursdays between 12:00 PM and 1:00 PM by the MSBA IT Group. During this time, all MSBA Web Applications will be shut down and will not be available to users. Please plan accordingly by saving your work and exiting all applications before the scheduled maintenance period.

Logging In

Once you have logged in successfully, you are taken to the MSBA Applications Home page and here you will see the list of the MSBA applications to which you have access.

Sample of the Application Home page shown below

Select "**OPM Report"** from this list to begin.

OPM Report Application Home Page

Once you have chosen the OPM Report application from the list, you are now taken to the home page of the OPM Report application.

On the left-hand side, you will see the navigation block which helps you to go to the different projects to which you have access.

On the right hand-side, you will see a basic introduction of the OPM report application and the "Need Help" section from where you can download the OPMR User Guide.

Sample of the OPM Report Home page shown below

Navigating the System Hierarchy

On the left-hand side of the screen is a navigation hierarchy, which by default, opens to your specific district. You may move between the district, schools and projects by clicking on the district name, school name or the project numbers (called MSBA IDs).

Region → District → School → Project (represented by a Project ID number below)

Sample of the "Navigation Hierarchy" shown below
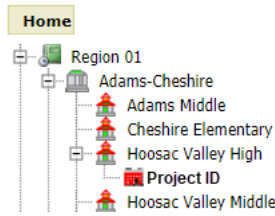
Please note that this sample image does not reflect the actual district.

Region: The first level in the navigation hierarchy is the region level. The MSBA has assigned every district to a region based on geographic location. This is the highest level or "Home" level. The OPM Report application will bring the district user right to its region.

District: The second level in the navigation hierarchy is the district level.

School: The next level in the navigation hierarchy is the school level. To view the list of all schools in a district, select the "+" located to the left of the district name. To collapse the list, select the "-" to the left of the district name.

Project: The final level in the navigation hierarchy contains the project. The OPM Report submission takes place at this level and you would have to navigate to here to see the OPM Report Details.

Sample of the "School Details" page shown below

District Name	West Bridgewater					**Long District Name**			West Bridgewater							
School Name	West Bridgewater Junior/Senior					**Long School Name**			West Bridgewater Junior/Senior							
District Code	0323					**School Code**			0505							
Address 1	155 West Center Street															
Address 2																
City	West Bridgewater															
State	MA															
Zip Code	02379															
County	Plymouth															
Phone	508-894-1220					**Ext.**										
Fax	508-897-0537															
eMail Address																
Year Opened	1951															
Year of Last Major Addition/Renovation	2002					**Type of Addition/Renovation**			2000 SF addition to Media Center, and Administration.							
Square Footage	117,780															
Grade Level	Middle/High School															

School Information

Grades	PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	School Total
Enrollment School Year(2019-2020)	☐	☐	☐	☐	☐	☐	☐	☐	☑	☑	☑	☑	☑	☑	
	0	0	0	0	0	0	0	0	107	107	105	103	103	106	631

Right-Hand Side Menu Options

On the right-hand side, in the Application home page, you will notice three links.

Sample of the "Menu items on the Application home page" shown below

Test district Test, you are in: **OPM Report**

Applications Home | My Account | Sign Out

- **Application Home –** This takes you back to the Applications Home Page.
- **My Account** - Click on this to see your user profile and to change your password.
- **Sign Out** - Click on this to logout of the system. *It is highly recommended to logout whenever you are done with your work. This keeps the system sessions and the browser history cleaner.*

Working on a Monthly Report

OPM Report Tabs

To enter data into a new OPM Monthly Report, you must first navigate to the project on which you are reporting. Click on it to display all of the tabs that need to be filled out, as shown below. For ease of use and understandability, our data collection is categorized to different tabs. Each tab has a list of fields that are specific to it.

Sample of the "OPM Reports tabs" shown below

OPM Report					
OPM Summary	**OPM**	**Designer**	**General Contractor**	**Attachments**	**Submit Report**

- **OPM Summary** – has basic information on the current report and hosts all the previously submitted reports
- **OPM** – is required if there is an active OPM contract and data is collected on the OPM activities
- **Designer** – is required if there is an active Designer contract and data is collected on the Designer contract and activities
- **General Contractor**– is required if there is an active General Contractor contract and data is collected on the General Contractor contract and activities.
- **Attachments** – lists the required and optional attachments for the monthly submission.
- **Submit Report** – contains the submission comments, also where the submit report button is located.

It is advised to enter data on the OPM Summary page first and then on each of the other pages.

Saving Data

Make sure that you press the "Save" button at the bottom of every page to save your changes. If you navigate away from the page before saving, a pop-up will be displayed to ask whether you want to leave the site. If you choose to "leave", your data will not be preserved, and you will have to re-enter you

answers to every question. If you choose to "cancel"; you will need to click on the "Save" button to preserve your data.

Sample of the "unsaved changes confirmation pop-up window" shown below:
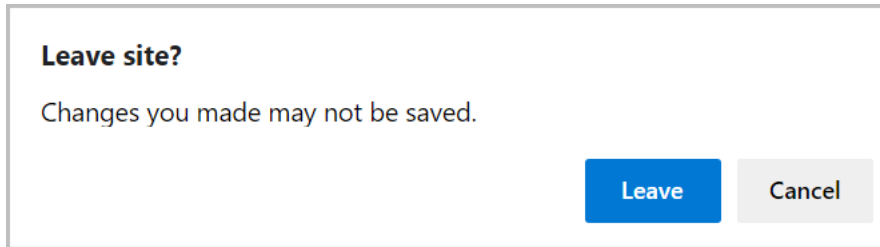
Tips for Entering Data

- Hovering on the blue question mark icon opens online help, revealing guidance on data entry for the field, including field size and format requirements.

  Sample of the "hovering online help icon" shown below.
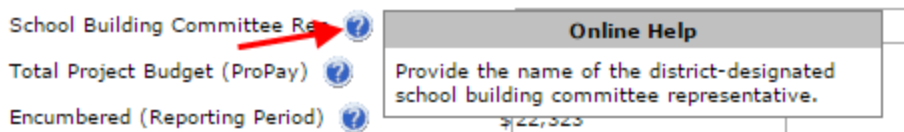
- Although many of these fields are not required, information should be provided in as many of the available fields as possible to provide a comprehensive status report. Required fields on each tab are displayed with a red. Fields that are not completed will appear blank in the final report.

  Sample of the "required field Indicator" shown below

- To ease the entry of financial amounts, the amount is auto formatted as you enter it and will stop automatically at its maximum. Also, you can only enter numbers. No other characters will be accepted.

  Sample of the "textboxes accepting numbers" shown below

Encumbered (Reporting Period) $22,323
Encumbered (to Date) $2,323,888
Total Value of Invoices Received (to Date) $232,888,888

- On the OPM, Designer and the General Contractor Tabs, the fields "Total Contract Amount", "Contract Amendments or Change Orders as Percentage of Original Contract Amount," and "Contract Amount Remaining" are auto calculated.

Sample of the "fields involved in auto-calculation" shown below

Original Contract Amount $ 2,000,000
Contract Amendments (to Date) 20,000
Value of Contract Amendments (to Date) $ 200,000
Total Contract Amount $2,200,000
Contract Amendments as Percentage of Original Contract Amount 10.0%
Invoices Paid (to Date) $ 0
Invoices Received (Reporting Period) $ 0
Contract Amount Remaining $2,200,000

- All the textbox entries display the number of characters the field accepts to give you an idea of how much you can enter. Also, the character entry stops automatically when the maximum is reached.

Sample of the "textboxes displaying the maximum entry of allowed characters" shown below

OPM Activities *Max entry:1000 characters*

No Active Contract Message

"An active [OPM/Designer/General Contractor] contract has not been submitted for this project"

You may see this message when you click on the OPM, Designer, or General Contractor tabs and do not have active contracts with MSBA.

If this is preventing you from submitting an accurate report, please contact Patrick DeAngelo (patrick.deangelo@MassSchoolBuildings.org)

Header Information

On each tab across the application, you will see a common header. This header displays the basic information like the District, School, Project ID and the Progress Report as of Date fields.

Sample of the "Common header" shown below

Entering Data

Page 1: OPM Summary

This tab displays basic information on the monthly report submission and the current project. This can be divided into three sections.

Sample of the "OPM Summary" page shown below

OPM Report					
OPM Summary	**OPM**	**Designer**	**General Contractor**	**Attachments**	**Submit Report**

Boston
School Name Project ID

Progress Report As of Date :

OPM

Firm Name	NV5 (fka Joslin, Lesser + Associates Inc.)	**Project Director**	Patrick M Murphy
Designer			
Firm Name	CSS Architects Incorporated	**Principal**	John J Savasta
General Contractor			
Firm Name		**Contact Name**	

OPM Summary

This page contains the current report and all previously submitted report details. For the current report, please select the Progress Report As of Date to start the submission process.

Current Report Details

Note : These fields should be filled in before working on a new report. Fields marked with an asterisk * are required

*Progress Report As of Date	02/28/2021 ⌄
School Building Committee Rep ❓	
Total Project Budget (ProPay) ❓	$0 **READ ONLY FIELD**
Encumbered (Reporting Period) ❓	$
Encumbered (to Date) ❓	$
Total Value of Invoices Received (to Date) ❓	$
*Project Completion Percentage ❓	%

[Save]

Previously Submitted OPM Reports

Report As of Date	Date Due	Date Submitted	Late?	Notes	Report	Attachments
8/31/2019	9/12/2019	9/11/2019	No		📄	📄
7/31/2019	8/12/2019	8/12/2019	No		📄	📄
6/30/2019	7/12/2019	7/12/2019	No		📄	📄
5/31/2019	6/12/2019	6/10/2019	No		📄	📄
4/30/2019	5/12/2019	5/13/2019	No		📄	📄
3/31/2019	4/12/2019	4/10/2019	No		📄	📄

** Rules for "Late"
   1. If the electronic submission is made after the 12th of the month, the "Late" indicator = "YES"

OPM Summary Header

The OPM Summary header displays the contract information for the project for which the OPMs submit the monthly reports. Note that only active contract information is displayed here. For example, if you do not have an active designer contract, no information will be displayed for that contract type.

Sample of the "OPM Summary header" section shown below

OPM			
Firm Name	NV5 (fka Joslin, Lesser + Associates Inc.)	**Project Director**	Patrick M Murphy
Designer			
Firm Name	CSS Architects Incorporated	**Principal**	John J Savasta
General Contractor			
Firm Name		**Contact Name**	

Current Report Details

The "Current Report Details" section contains information that drives your current monthly report. For this reason, it is suggested that you finish this section prior to going to any other tabs. The first step is to choose the "**Reporting Period as of Date**" to indicate the reporting period. You will not be able to save this page unless you have specified the reporting period. Also, the "Project Completion Percentage" is another required field on this page. You will only be able to save this page if you have "write" capability to the report; otherwise, the default view to this page is read-only.

Sample of the "Current Report Details" section shown below

In the current report, once the files are uploaded in the "Attachments" tab, if you change the reporting period on the "OPM Summary" tab, a pop-up message will be displayed to alert you that attachments for this reporting period already exist. Changing the reporting period will clear all the attachments and data associated with the current Reporting Period. Please re-attach the files for the newly chosen Reporting Period on the Attachments tab.

Sample of the "Reporting Period Change when Attachments present" pop up shown below

Confirm Change of Reporting Period ✖

Attachments for Reporting Period 9/30/2020 already exist. Changing the Reporting Period to 10/31/2020 would clear all the attachments associated with the current Reporting Period. Please re-attach the files for the new Reporting Period on the Attachments tab.

OK

If there are no files uploaded prior to changing the reporting period, no pop-up message will be displayed.

Previously Submitted OPM Reports

This section hosts all the previously submitted OPM Monthly Reports for the project. If there are none available, a message "No report has been submitted" will be displayed as shown below.

Sample of the "Previously Submitted Reports" section with no reports submitted message shown below

Previously Submitted OPM Reports
No report has been submitted

After submission of the first OPM report, the section will display basic information about the submission and will provide the option to download the submitted report and attachments. Clicking on the "PDF Icon" will download the submitted OPM report or attachments. You cannot edit the submitted Reports.

The "Attachments Submission" feature is a new feature and the "PDF icon" is displayed for downloading the attachments for newer reports. For older reports, where there were no attachments submitted, there will not be a download option.

Sample of the "Previously submitted OPM Reports" section shown on next page

Previously Submitted OPM Reports

Report As of Date	Date Due	Date Submitted	Late?	Notes	Report	Attachments
10/31/2015	11/12/2015	4/27/2016	Yes			
9/30/2015	10/12/2015	10/9/2015	No			
8/30/2015	9/12/2015	9/11/2015	No			
7/31/2015	8/12/2015	8/7/2015	No			
6/30/2015	7/12/2015	7/10/2015	No			
5/31/2015	6/12/2015	6/10/2015	No			
4/30/2015	5/12/2015	5/15/2015	Yes			

Rules for "Late"
1. If the electronic submission is made after the 12th of the month, the "Late" indicator = "YES"

Page 2: OPM

The OPM tab focuses on OPM-related project updates and project costs to date. It displays the "OPM Contract Information" as a header below the common header. This OPM Contract Information, including the company name, contract number, and contacts, is entered by the MSBA. If you have "write" capability to the report, you will be able to enter and save information; otherwise, the default view to this page is read-only.

Although none of these fields are required, information should be provided in as many of the available fields as possible to provide a comprehensive status report.

Please remember to SAVE your data! If you navigate away from this page without saving, your data will be lost.

Sample of the "OPM" page shown below

Page 3: Designer

The Designer tab allows for the entry of status and other key information related to the project designer. It also displays the "Designer Contract Information" as a header below the common header. Basic Designer information, including the company name, contract number, and contacts, is entered by the MSBA. If you have "write" capability to the report, you will be able to enter and save information; otherwise, the default view to this page is read-only.

Although none of these fields are required, information should be provided in as many of the available fields as possible to provide a comprehensive status report.

Please remember to SAVE your data! If you navigate away from this page without saving, your data will be lost.

Sample of the "Designer" page shown on next page

OPM Report

| OPM Summary | OPM | Designer | General Contractor | Attachments | Submit Report |

Boston

Progress Report As of Date :

School Name   Project ID

Designer		
Firm Name	Dietz & Company Architects, Inc.	**Principal** Kerry L Dietz

Designer Details

Progress Report as of Date	
Original Contract Amount ❓	$ _____ 0
Contract Amendments (to Date) ❓	_____ 0
Value of Contract Amendments (to Date) ❓	$ _____ 0
Total Contract Amount ❓	$0
Contract Amendments as Percentage of Original Contract Amount ❓	0.0%
Invoices Paid (to Date) ❓	$ _____ 0
Invoices Received (Reporting Period) ❓	$ _____ 0
Contract Amount Remaining ❓	$0
Designer Activities (Reporting Period) ❓	Max entry:1000 characters
RFIs Issued (Reporting Period) ❓	_____ 0
Total RFIs Issued (to Date) ❓	_____
Remaining Open RFIs	past 30 days [0] Notes Max entry:250 characters
	past 60 days [0] Notes Max entry:250 characters

past 90 days [0] Notes [Max entry:250 characters]

Phase ❓ [Eligibility Period ▾]

Phase Scheduled Completion Date ❓ [__/__/____]

Submittals Received (Reporting Period) ❓ [0]

Total Submittals Received (to Date) ❓ [ ]

Submittals Reviewed (Reporting Period) ❓ [0]

Total Submittals Reviewed (to Date) ❓ [ ]

Comments (Remaining Open Submittals) ❓ [Max entry:1000 characters]

Commissioning Consultant ❓ [Max entry:60 characters]

Commissioning Consultant Status ❓ [Max entry:1000 characters]

30 Day Look Ahead ❓ [Max entry:500 characters]

MBE/WBE

	Percentage		Actual	
MBE	[0.0] % ❓		[0.0] % ❓	
WBE	[0.0] % ❓		[0.0] % ❓	

Workforce Participation

Total Hours ❓ [0]

Minority Hours ❓ [0]

Minority Percentage ❓ [0.0]%

Minority Workforce Participation ❓ [0.0]%

Female Hours ❓ [0]

Female Percentage ❓ [0.0]%

Female Workforce Participation ❓ [0.0]%

[Save]

Page 4: General Contractor

Select the General Contractor sub-tab to submit status information related to the General Contractor. It also displays the "General Contractor Contract Information" as a header below the common header. Basic General Contractor information, including the company name, contract number, and contacts, is entered by the MSBA. If you have "write" capability to the report, you will be able to enter and save information; otherwise, the default view to this page is read-only.

Although none of these fields are required, information should be provided in as many of the available fields as possible to provide a comprehensive status report.

Please remember to SAVE your data! If you navigate away from this page without saving, your data will be lost.

Sample of the "General Contractor" page shown on next page

OPM Summary	OPM	Designer	General Contractor	Attachments	Submit Report

Boston

School Name Project ID

Progress Report As of Date :

General Contractor

Firm Name	Homer Contracting	**Contact Name**	Stefanos Bouboulis

General Contractor Details

Progress Report As Of Date	
Original Contract Amount (including CM-At-Risk Amendments)	$
Procurement Type	Undetermined
Change Orders (to Date)	
Value of Change Orders (to Date)	$
Total Contract Amount	
Change Orders as Percentage of Original Contract Amount	
Pending Change Orders	$
Change Order Status	Max entry:1000 characters
Invoices Paid (to Date)	$
Invoices Received (Reporting Period)	$
Contract Amount Remaining	
Notice to Proceed Date	

Physical Progress ❓ [   ] %

Substantial Completion Date (Reported) ❓ [8/24/2018]

Substantial Completion Date (Contract) ❓ [__/__/____]

Substantial Completion Date (Certificate) ❓ [__/__/____]

Construction Progress (Reporting Period) ❓ [Max entry:2000 characters]

30-Day Look Ahead ❓ [Max entry:500 characters]

Overall Schedule Assessment ❓ [Max entry:2000 characters]

Problems Identified (Schedule or Construction) ❓ [Max entry:500 characters]

Quality Control ❓ [Max entry:1000 characters]

Safety Compliance ❓ [Max entry:500 characters]

Number of Claims (to Date) ❓ [   ]

Value of Claims (to Date) ❓ $ [   ]

Comments ❓ [Max entry:1000 characters]

Recorded Manpower (Reporting Period) [Max entry:250 characters]

Contractor Closeout Status ❓ [Max entry:1000 characters]

MBE/WBE

	Percentage	Actual
MBE	[ ] % ❓	[ ] % ❓
WBE	[ ] % ❓	[ ] % ❓

Workforce Participation

Total Hours ❓ [   ]

Minority Hours ❓ [   ]

Minority Percentage ❓ [   ] %

Minority Workforce Participation ❓ [   ] %

Female Hours ❓ [   ]

Female Percentage ❓ [   ] %

Female Workforce Participation ❓ [   ] %

[Save]

Page 5: Attachments

"Attachments" is the new tab that is being introduced to the OPM Monthly report. It enables you to upload your attachments as part of the monthly report submissions. A summary of the different types of attachments to be uploaded and their constraints are as follows:

	Attachment Type	Format	Size	
Attachment 1	Signed OPM Monthly Report with Budget and Cost Report (MSBA Format)	PDF	2 MB	Required
Attachment 2	Projected Cash Flow vs. Actual Cash Flow	PDF	2 MB	Required
Attachment 3	OPM Project Schedule	PDF	2 MB	Required
Attachment 4	Contractor Look Ahead Schedule	PDF	2 MB	Conditionally Required

Sample of the "Attachments" page shown below

If a Reporting Period is not selected in the "OPM Summary" page and you go to the attachments page, you will not be able to upload any attachments. The Reporting period selection is mandatory for uploading any attachments.

Sample of the "Attachments" page when no reporting period is selected shown below

OPM Report					
OPM Summary	OPM	Designer	General Contractor	Attachments	Submit Report

Boston
School Project ID

Progress Report As of Date :

Attachments

A Reporting period has not been selected. Please select it on the OPM Summary tab for this page to be available.

To upload a file, just click on "Choose File" or "Browse" (the option displayed is dependent on your browser) to choose the file from your computer and click on "Attach" to upload. Once uploaded, you can download the file by clicking on the "file name". You also have the option to delete the file.

Sample of the "Uploaded Attachments on the Attachments page" shown below

Attachment 1 - Signed OPM Monthly Report with Budget and Cost Report (MSBA Format)

Note: To upload this report, please download the 'pre-submission' OPM Report by clicking on the 'Download report to sign' link below. Please sign on the 'downloaded' report; scan it and re-upload it as 'Attachment 1'. Please make sure that the format of the file is 'PDF' and the file size doesn't exceed 2 MB.

Download report to sign

Budget Cost: Choose File No file chosen   Attach

When you try to delete a file, a confirmation pop-up is displayed to confirm that you want to delete the file. Clicking on "OK" will delete the file and clicking on "Cancel" will leave the file as it is.

Sample of the "Delete Confirmation" shown below
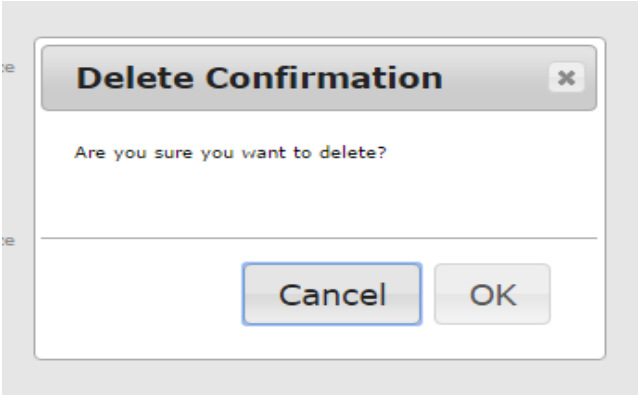
The option to delete or upload files is available only until the report is submitted. Once submitted, no more changes can be made to the uploaded files.

To see any already uploaded attachments for a report, go to the "Previously Submitted Reports" section of OPM Summary tab and click on "attachments" for the given reporting period and download.

"Attachment 1" is the signed copy of the "draft OPM Report" and it is replacing the hard copy report that is submitted to MSBA. So, make sure the Report is filled out properly and completely before you download the report and sign it. Once it is signed, please scan and re-upload the file as Attachment 1. As the table summarizes, the first three attachments are required and the last one is dependent on the open status of the General Contractor Tab.

Page 6: Submit Report

When all information has been entered for the OPM Report, it must be submitted to the MSBA. The submission will be completed via this tab. A Submission Comment field is available for any additional comments that might be needed to explain the report.

Sample of the "Submit Report" page shown below

Draft reports may be viewed by selecting the "View Draft Report" link. When the report is ready for submission (that is, after the OPM is satisfied with all data entered), select the "Submit" button to transmit the data to the MSBA.

If the "Submit" button is grayed out and unavailable:
- You may be trying to submit the report for a "future reporting period". For E.g. you can submit a reporting for reporting period "1/31/2021" from 2/1 and not before. For more details see the "Due Date" section at the beginning of this document after the "Introduction."
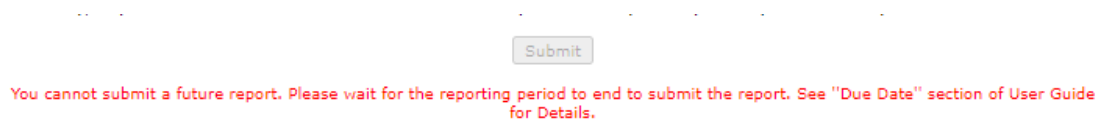
- You may have forgotten to select a reporting period on the OPM Summary page. This is displayed below the submit button in red. Please go back to that page and make sure all the data on that page is correct.

    Sample of the "Submit Report" page with "OPM Summary incomplete error" shown below
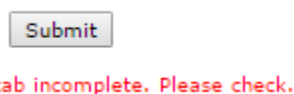
- The required attachments may not have been attached. This is displayed below the submit button in red. Please go back to the "Attachments" page and check if all the required files are uploaded. The error message will indicate which attachment is required.

Sample of the "Submit Report" page with "Attachments incomplete error" shown below

Missing attachment 1:

Signed OPM Monthly Report with Budget and Cost Report (Attachment 1) is required.

Missing attachment 2:

Projected Cash Flow vs. Actual Cash flow (Attachment 2) is required.

Missing attachment 3:

OPM Project Schedule (Attachment 3) is required.

Missing attachment 4:

Contractor Lookahead Schedule (Attachment 4) is required when an active General Contractor is present.

When you click on the "Submit" button, a pop-up is displayed to confirm that you want to submit this report. The pop-up has a few basic instructions. Once you click on "OK", the report will be submitted. Clicking on "Cancel" will take you back to the same page and you can submit the report later.

Sample of the "Submit Confirmation" shown below
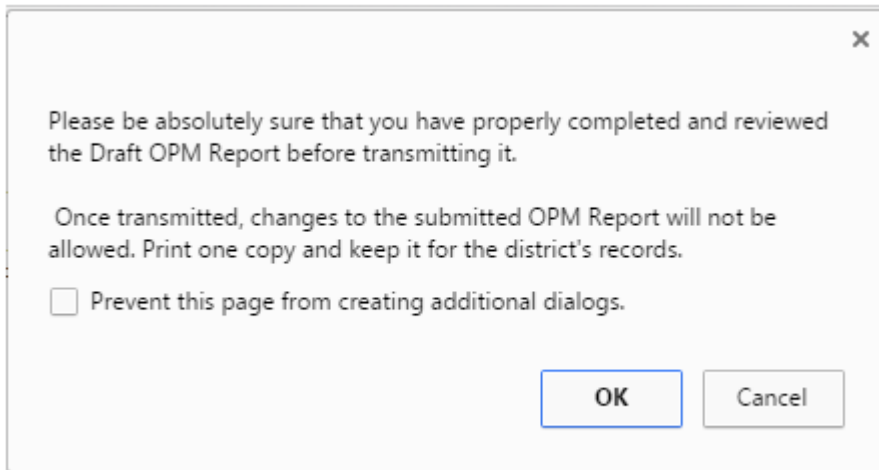
Once the report is successfully submitted the page will redirected to OPM Summary page. Here the user can download the submitted Report and Attachments

Once transmitted, an OPM Report may not be modified.

Appendix: Field Names and Definitions

OPM Summary

Field Name	Definition
Progress Report as of Date	The last day of the month of the reporting period.
School Building Committee Rep	The district-designated school building committee representative.
Total Project Budget (Pro-Pay)	The total of the original approved project budget and approved budget adjustments. Project budget data is submitted via the MSBA's Pro-Pay system. This field is read only.
Encumbered (Reporting Period)	The amount encumbered for the project during the current reporting period. This currency amount, in whole dollars only, is limited to 9 digits (999,999,999) excluding commas.
Encumbered (to Date)	The total amount encumbered for the project to date. This currency amount, in whole dollars only, is limited to 9 digits (999,999,999) excluding commas.
Total Value of Invoices received (to Date)	The total amount of project invoices received to date. This currency amount, in whole dollars only, is limited to 9 digits (999,999,999) excluding commas.
Project Completion Percentage	The estimated project completion percentage. This value in decimal, is limited to 3 whole digits, up to 100% and can take up to 2 decimal places.

OPM

Field Name	Definition
Original Contract Amount	The original OPM contract amount. This currency amount, in whole dollars only, is limited to 9 digits (999,999,999) excluding commas.
Contract Amendments (to Date)	The number of contract amendments to the OPM contract to date. This number, in integer values only, is limited to 6 digits (999,999) excluding commas.
Total Contract Amount	The sum of the original contract amount and the value of all approved amendments to that contract. It is calculated as [Original Contract Amount] + [Value of Contract Amendments (to Date)]. This field is calculated and read only.
Contract Amendments as Percentage of Original Contract Amount	The total value of approved contract amendments as a percentage of the original contract amount. It is calculated as [Value of Contract Amendments (to Date)] / [Original Contract Amount]. This field is calculated and read only.
Value of Contract Amendments (to Date)	The total value of amendments to the OPM contract to date. This currency amount, in whole dollars only, is limited to 9 digits (999,999,999) excluding commas.
Invoices Paid (to Date)	The total value of OPM invoices paid to date. This currency amount, in whole dollars only, is limited to 9 digits (999,999,999) excluding commas.
Invoices Received (Reporting Period)	The total amount of OPM invoices received to date. This currency amount, in whole dollars only, is limited to 9 digits (999,999,999) excluding commas.
Contract Amount Remaining	The balance of the original contract amount (including approved contract amendments) that has not been paid or otherwise committed to the project. It is calculated as [Original Contract Amount] + [Value of Contract Amendments (to Date)] - [Invoices Paid (to Date)] - [Invoices Received (Reporting Period)]. This field is calculated and read only.
OPM Activities (Reporting Period)	A Description of the OPM's activities during the reporting period.
Project Budget Status	A description of the project budget status, focusing on any issues that need to be highlighted.
MSBA Closeout Status	Describe the MSBA closeout status, focusing on the documents and activities required by the MSBA before the MSBA can commence the Final Closeout Audit process as outlined in Module 8.
Potential Issues	A description of any potential issue occurred during the project.

Designer

Field Name	Definition
Original Contract Amount	The original Designer contract amount. This currency amount, in whole dollars only, is limited to 9 digits (999,999,999) excluding commas.
Contract Amendments (to Date)	The number of contract amendments to the OPM contract to date. This number, in integer values only, is limited to 6 digits (999,999) excluding commas.
Value of Contract Amendments (to Date)	The total value of amendments to the Designer contract to date. This currency amount, in whole dollars only, is limited to 9 digits (999,999,999) excluding commas.
Total Contract Amount	The sum of the original contract amount and the value of all approved amendments to that contract. It is calculated as [Original Contract Amount] + [Value of Contract Amendments (to Date)]. This field is calculated and read only.
Contract Amendments as Percentage of Original Contract Amount	The total value of approved contract amendments as a percentage of the original contract amount. It is calculated as [Value of Contract Amendments (to Date)] / [Original Contract Amount]. This field is calculated and read only.
Invoices Paid (to Date)	The total value of designer invoices paid to date. This currency amount, in whole dollars only, is limited to 9 digits (999,999,999) excluding commas.
Invoices Received (Reporting Period)	The total amount of designer invoices received to date. This currency amount, in whole dollars only, is limited to 9 digits (999,999,999) excluding commas.
Contract Amount Remaining	The balance of the original contract amount (including approved contract amendments) that has not been paid or otherwise committed to the project. It is calculated as [Original Contract Amount] + [Value of Contract Amendments (to Date)] - [Invoices Paid (to Date)] - [Invoices Received (Reporting Period)]. This field is calculated and read only.
Designer Activities (Reporting Period)	Description of the Designer's activities during the reporting period.
RFIs issued (Reporting period)	The number of project related RFIs issued during the reporting period. This number, in integer values only, is limited to 6 digits (999,999) excluding the comma.
Total RFIs Issued (to Date)	The total number of RFIs that have being issued for the project to date. It is calculated as the sum of [RFIs Issued (Reporting Period)] values entered in all prior submissions. This field is calculated and read only.
Remaining Open RFIs **(a) Past 30 days**	The number of RFIs issued for the last 30 days of the reporting period.
Notes	A free-form field for OPM to enter any comments or notes
(b) Past 60 days	The number of RFIs issued for the last 60 days of the reporting period.
Notes	A free-form field for OPM to enter any comments or notes
(c) Past 90 days	The number of RFIs issued for the last 90 days of the reporting period.
Notes	A free-form field for OPM to enter any comments or notes
Phase	The current project phase of the project.
Phase Scheduled Completion Date	The scheduled completion date for the current project phase
Submittals Received (Reporting Period)	The total number of submittals received during the reporting period. This amount, in integer values only, is limited to 6 digits (999,999) excluding the comma.
Total Submittals Received (to Date)	The total number of submittals that have been received to date. It is

	calculated as the sum of [Submittals Received (Reporting Period)] values entered in all prior submissions. This field is calculated and read only.
Submittal Reviewed (Reporting Period)	The total number of submittals reviewed during the reporting period. This amount, in integer values only, is limited to 6 digits (999,999) excluding the comma.
Total Submittals Reviewed (to Date)	The total number of submittals that have been received to date. It is calculated as the sum of [Submittals Reviewed (Reporting Period)] values entered in all prior submissions. This field is calculated and read only.
Comments (Remaining Open Submittals)	A description of the open submittals that conveys a complete status for this project. These comments should be phase specific.
Commissioning Consultant	The name of the project's commissioning consultant.
Commissioning Consultant Status	The commissioning consultant's status for the reporting period.
30 Day Look Ahead	The Designer's 30-day look-ahead for the project.
MBE/WBE (a) **MBE Percentage**	The percentage of the design contract that must be satisfied using a certified MBE (minority-owned business enterprise).
(b) **MBE Actual**	The actual percentage of the design contract that is satisfied using a certified MBE (minority-owned business enterprise).
(c) **WBE Percentage**	The percentage of the design contract that must be satisfied using a certified WBE (woman-owned business enterprise).
(d) **WBE Actual**	The actual percentage of the design contract that is satisfied using a certified WBE (woman-owned business enterprise).
Workforce Participation (a) **Total Hours**	The total number of labor hours worked, to date, on the contract.
(b) **Minority Hours**	The total number of labor hours worked, to date, by minorities on the contract.
(c) **Minority Percentage**	The total number of labor hours worked, to date, as a percentage by minorities on the contract.
(d) **Minority Workforce Participation**	The minority workforce participation contained in the design contract.
(e) **Female Hours**	The total number of labor hours worked, to date, by women on the contract.
(f) **Female Percentage**	The total number of labor hours worked, to date, as a percentage by women on the contract.
(g) **Female Workforce Participation**	The female workforce participation contained in the design contract.

General Contractor

Field Name	Definition
Original Contract Amount (including CM-At-Risk Amendments)	The original construction contract amount including CM-At-Risk amendments if applicable. This currency amount, in whole dollars only, is limited to 9 digits (999,999,999) excluding commas.
Procurement Type	The construction procurement type. The procurement type is specified in the MSBA's Pro-Pay system. Available values are Design-Bid-Build or CM-At-Risk. This field is read only.
Change Orders (to Date)	The number of change orders to the construction contract to date. This amount, in integer values only, is limited to 9 digits (999,999,999) excluding commas.
Value of Change Orders (to Date)	The total value of change orders to the construction contract to date. This currency amount, in whole dollars only, is limited to 9 digits (999,999,999) excluding commas.
Total Contract Amount	The sum of the original contract amount and the value of all approved amendments to that contract. It is calculated as [Original Contract Amount] + [Value of Change Orders (to Date)]. This field is calculated and read only.
Change Orders as percentage of Original Contract Amount	The total value of approved change orders as a percentage of the original contract amount. It is calculated as [Value of Change Orders (to Date)] / [Original Contract Amount]. This field is calculated and read only.
Pending Change Orders	The total value of pending change orders to the construction contract. This currency amount, in whole dollars only, is limited to 9 digits (999,999,999) excluding commas.
Change Order Status	A description of the status of change orders for this project.
Invoices Paid (to Date)	The total value of construction invoices paid to date. This currency amount, in whole dollars only, is limited to 9 digits (999,999,999) excluding commas.
Invoices Received (Reporting Period)	The total amount of construction invoices received in the reporting period. This currency amount, in whole dollars only, is limited to 9 digits (999,999,999) excluding commas.
Contract Amount Remaining	The balance of the original contract amount (including approved contract amendments) that has not being paid or otherwise committed to the project. It is calculated as [Original Contract Amount] + [Value of Change Orders (to Date)] - [Invoices Paid (to Date)] - [Invoices Received (Reporting Period)]. This field is calculated and read only.
Notice to Proceed Date	The date upon which a general contractor may begin construction, subject to the terms and conditions of the construction contract. This date is specified in the MSBA's Project Management subsystem. This field is read only.
Physical Progress	A description of the physical progress of the construction effort during the reporting period.
Substantial Completion Date (Reported)	The substantial completion date reported to the MSBA. Date is specified in the MSBA's Project Management subsystem. This field is read only.
Substantial Completion Date (Contract)	The substantial completion date, as defined by the construction contract.
Substantial Completion Date (Certificate)	Date certified by the project architect on which the project building (or a specified portion) is complete to the extent it can be occupied or used for its intended purpose in accordance with contract and/or regulatory requirements. The substantial completion date, as defined by the certificate of substantial completion.
Construction Progress (Reporting Period)	A Description of the construction progress made during the reporting period.
30 Day Look Ahead	The construction professional's 30-day look-ahead for general contractor activities.

Overall Schedule Assessment	An overall assessment of the construction schedule.
Problems Identified (Schedule or Construction)	A description of all problems encountered.
Quality Control	A description of quality control measures taken during the project.
Safety Compliance	A description of safety compliance issues that have arisen during the project.
Number of Claims (to Date)	The number of claims filed against the project to date. This number, in integer values only, is limited to 6 digits (999,999) excluding the comma.
Value of Claims (to Date)	The total value of claims filed against the project to date. This currency amount, in whole dollars only, is limited to 9 digits (999,999,999) excluding the comma.
Comments	A description of claims filed against the project.
Recorded Manpower (Reporting Period)	The number of jobs created in the period. This field can also be used as notes.
Contractor Closeout Status	The contractor closeout status, focusing on any issues that need to be highlighted.
MBE/WBE	
(a) MBE Percentage	The percentage of the construction contract that must be satisfied using a certified MBE (minority-owned business enterprise).
(b) MBE Actual	The actual percentage of the construction contract that is satisfied using a certified MBE (minority-owned business enterprise).
(c) WBE Percentage	The percentage of the construction contract that must be satisfied using a certified WBE (woman-owned business enterprise).
(d) WBE Actual	The actual percentage of the construction contract that is satisfied using a certified WBE (woman-owned business enterprise).
Workforce Participation	
(a) Total Hours	The total number of labor hours worked, to date, on the contract.
(b) Minority Hours	The total number of labor hours worked, to date, as a percentage by minorities on the contract.
(c) Minority Percentage	The total number of labor hours worked, to date, as a percentage by minorities on the contract.
(d) Minority Workforce Participation	The minority workforce participation contained in the construction contract.
(e) Female Hours	The total number of labor hours worked, to date, by women on the contract.
(f) Female Percentage	The total number of labor hours worked, to date, as a percentage by women on the contract.
(g) Female Workforce Participation	The female workforce participation contained in the construction contract.

Submit Report

Field Name	Definition
Submission Comments	A description of any submission notes or comments.