

## ***PSC Selection Process (PSP) - Committee Chair***

STEP #1 PROJECT INITIATION	
PRZM: AE/CM/P&A/ESCO Committee Information	
<b>Step</b>	<b>Task</b>
1.	From the <b>Phases</b> menu, select <b>AE/CM/P&amp;A/EPC Selection &amp; Administration</b> . <ul style="list-style-type: none"> <li>• QBS: select AE Selection &amp; Administration</li> <li>• RFP (CM/P&amp;A): select CM or P&amp;A Selection &amp; Administration</li> <li>• EPC: select EPC Selection &amp; Administration</li> </ul>
2.	From the <b>AE/CM/P&amp;A/EPC Administration</b> submenu, select <b>AE/CM/P&amp;A/ESCO Committee Information</b> .
3.	Click the <b>Create</b> command button.
4.	In the <b>Committee Chair</b> field, select Committee Chair. <ul style="list-style-type: none"> <li>• If the name of the Committee Chair does not appear in the drop-down, ensure the Committee Chair has been added to the Team Members list and selected as Campus Construction Unit - Planner/Project Manager in Team Management.</li> </ul>
5.	In the <b>Committee Members</b> field, verify that all committee members are selected. <ul style="list-style-type: none"> <li>• If the names of the committee members do not appear in the form, ensure all committee members are added to the Team Members list and selected as PSC Selection Team in Team Management.</li> <li>• Select appropriate committee members for the AE/CM/P&amp;A selection processes.</li> </ul>
6.	For AE/P&A Only: In the <b>Selection for a Retainer</b> field, click the drop-down and select <b>Yes</b> or <b>No</b> . <ul style="list-style-type: none"> <li>• If <b>Yes</b>, the PSC selection process will complete upon the approval of the Approval Form to Negotiate with Recommended PSC from Discussion Meeting (Interview).</li> </ul>
7.	In the <b>Comments</b> field, enter comments, if necessary.
8.	In the <b>Document Status</b> field, select <b>Completed</b> ; <b>Not Completed</b> if incomplete.
9.	Review the criteria; click the <b>Save</b> command button. <ul style="list-style-type: none"> <li>• The Save button will <b>ONLY</b> appear after the expiration of the PSC submittal deadline.</li> </ul>

STEP #2 INITIAL EVALUATION	
PSP: Professional Procurement Form (PPF)	
Step	Task
1.	From the <b>AE/CM/P&amp;A/EPC Administration</b> submenu, select the <b>PSP Link</b> .
2.	From the <b>PSP Dashboard</b> , click the <b>Create</b> command button next to <b>Procurement Participation Form</b> .
3.	In the form, click the check box for each question. <ul style="list-style-type: none"> <li>If any member is unwilling or unable to complete this Agreement, that committee member shall be removed from the selection committee by the committee chair in PSP and PRZM.</li> </ul>
4.	In the <b>Comments</b> field, enter comments, if necessary.
5.	In the <b>Status</b> field, select <b>Complete</b> ; <b>Pending</b> if incomplete.
6.	Review and complete the form; click the <b>Save</b> command button to submit.
PSP: Project Information Details – Initial Evaluation Criteria from Advertisement	
Step	Task
1.	From the <b>PSP Dashboard</b> , click the <b>Open</b> command button next to <b>Project Information Details</b> .
2.	Click the <b>Edit</b> command button.
	Note: If the RFP CM/P&A/QBS/EPC advertisements include Conceptualization with the possibility of additional phases of work, the anticipated future fee amount must be used to determine the appropriate approval level.
3.	For EPC Only: In the <b>Diversity Percentages</b> field, enter the percentages of participation that were in the EPC RFP.
4.	In the <b>Initial Evaluation Criteria From Advertisement</b> field, add the criteria that were published in the PSC advertisement on the IPHEC Bulletin Board. <ul style="list-style-type: none"> <li>EPC: enter the weighted percentage of each criteria that were in the EPC RFP.</li> </ul>
5.	In the <b>Initial Evaluation Criteria Complete</b> field, select <b>Yes</b> ; <b>Pending</b> if incomplete.
6.	Review the criteria; click the <b>Save</b> command button.
PSP: Initial Evaluation Minimum Qualifications	
Step	Task
1.	From the <b>PSP Dashboard</b> , click the <b>Create</b> command button next to <b>Initial Evaluation Minimum Qualifications</b> .
2.	In each <b>Firm</b> column, click the drop-down and select <b>Yes</b> or <b>No</b> for each Minimum Qualifications Question. <ul style="list-style-type: none"> <li>If the firm does not have a previous performance evaluation, the question for <b>Performance Evaluation Scores 3 or Above</b> does not apply; therefore, select <b>Yes</b>.</li> <li>RFP (CM/P&amp;A): If a question does not apply, select <b>Yes</b>.</li> </ul>
3.	In each <b>Firm</b> column, click the drop-down and select a score or a percentage for each MBE/FBE/FMB/PBE and VOSB/SDVOSB Question. <ul style="list-style-type: none"> <li>QBS and RFP (CM/P&amp;A): The scoring for each question is based on the MBE/FBE/FMB/PBE and VOSB/SDVOSB Initial Selection Points in the QBS and RFP Policies. Refer to the UOCP&amp;RES website for the current information.</li> <li>EPC: The percentage for each question is based on the ESCO submittal.</li> <li>If an AE/CM/P&amp;A/ESCO firm is designated as <b>Fail</b>, the scores for MBE/FBE/FMB/PBE and</li> </ul>

	VOSB/SDVOSB Questions are not required and not editable.
4.	In each <b>Subconsultants</b> column, enter Subconsultant information for each <b>Firm</b> . Note: If PSC listed multiple firms for a same category, <b>create separate categories and enter only one firm per field</b> (e.g., MEP1, MEP2, Civil1, Civil2). <ul style="list-style-type: none"> <li>Some fields are pre-populated with Subconsultant categories and may be edited.</li> <li>Blank spaces are provided so additional Subconsultant categories may be entered.</li> </ul>
5.	In the <b>Comments</b> field, enter comments, if necessary.
6.	In the <b>Status</b> field, select <b>Complete; Pending</b> if not complete.
7.	Review the criteria; click the <b>Save</b> command button.
8.	After the completion of <b>Initial Evaluation Minimum Qualifications</b> , the system will send an email notification to each committee member.
<i>Committee Members complete the Initial Evaluation Individual form.</i>	
<b>PSP: Initial Evaluation Composite</b>	
<b>Step</b>	<b>Task</b>
1.	After the completion of <b>Initial Evaluation Individual by all committee members</b> , the system will send an email notification to the Committee Chair.
2.	From the <b>PSP Dashboard</b> , click the <b>Create</b> command button next to <b>Initial Evaluation Composite</b> .
3.	In the <b>Status</b> field, select <b>Complete; Pending</b> if incomplete.
4.	Review and complete the form; click the <b>Save</b> command button.
<b>PSP: Approval Form for Firms to be Invited to Discussion Meeting (Interview) QBS and RFP ONLY</b>	
<b>Step</b>	<b>Task</b>
1.	From the <b>PSP Dashboard</b> , click the <b>Create</b> command button next to <b>Approval Form For Firms To Be Invited To Discussion Meeting (Interview)</b> .
2.	Under the <b>Firms Recommended For Invitation</b> section in the <b>Firms</b> column, click the drop-down and select <b>the names of Firms Recommended For Invitation</b> .
3.	Under the <b>Firms Recommended For Invitation</b> section, in the <b>CMS Diversity</b> column, click the drop-down and select <b>the appropriate designation for each Firm and its Subconsultants</b> .
4.	Under the <b>Firms Recommended For Invitation</b> section in the % column, enter <b>the appropriate participation for each Firm and its Subconsultants</b> .
5.	Under the <b>Firms Recommended For Invitation</b> section in the <b>Primary Firm has an Office in Illinois</b> column, click the drop-down and select <b>Yes or No</b> .
6.	Under the <b>Firms Recommended For Invitation</b> section in the <b>Reference Calls Complete</b> field, click the drop-down and select <b>Yes, if complete</b> .
8.	Under the <b>Firms Recommended For Invitation</b> section in the <b>Recommendation Supported By Documentation</b> field, click the drop-down and select <b>Yes or No</b> . <ul style="list-style-type: none"> <li>If <b>Yes</b>, select the radio button for an appropriate <b>Reason for Recommendation</b>. Enter an explanation in the <b>Reason For Recommendation Comment</b> field, if necessary.</li> <li>If <b>Yes</b> and select <b>Other or No</b>, enter an explanation in the <b>Reason For Recommendation Comment</b> field.</li> </ul>
9.	In the <b>Attachments</b> section, upload documents, if necessary.
10.	Under the <b>Approval Section</b> in the <b>Committee Chair</b> field, select <b>Yes; Pending</b> if incomplete.
11.	In the <b>Comments</b> field, enter comments, if necessary.
12.	Review and complete the form; click the <b>Save</b> command button.
<i>Approvals are completed by Campus Directors, UOCP, SAVP (depending on dollar limit).</i>	



STEP #3 DISCUSSION MEETING (INTERVIEW) EVALUATIONS	
PSP: Project Information Details	
Step	Task
1.	From the <b>PSP Dashboard</b> , click the <b>Open</b> command button next to <b>Project Information Details</b> .
2.	Click the <b>Edit</b> command button.
3.	In the <b>Discussion Meeting Questions/Criteria</b> fields, add the questions. <ul style="list-style-type: none"> <li>• QBS: add the questions that were developed by the committee.</li> <li>• RFP (CM/P&amp;A): add the questions that were published in the PSC advertisement on the IPHEC Bulletin Board.</li> <li>• EPC: add the criteria that were published in the EPC RFP.</li> </ul>
4.	In the <b>Discussion Meeting Questions Complete</b> field, select <b>Yes; Pending</b> if incomplete.
5.	Review the questions; click the <b>Save</b> command button.
6.	After the completion of <b>Discussion Meeting Questions</b> , the system will send an email notification to each committee member.
<i>Committee Members complete the Discussion Meeting (Interview) Evaluation Individual form.</i>	
PSP: Discussion Meeting (Interview) Evaluation Composite	
Step	Task
1.	After the completion of the <b>Discussion Meeting (Interview) Evaluation Individual by all committee members</b> , the system will send an email notification to the committee chair.
2.	From the <b>PSP Dashboard</b> , click the <b>Create</b> command button next to the <b>Discussion Meeting (Interview) Evaluation Composite</b> .
3.	In each <b>Firm</b> column, enter comments, if necessary.
4.	In the <b>Committee Final Recommendation in Priority Order</b> field, click the drop-down and select <b>the names of Firms</b> in ranking order that were agreed by the committee.
5.	In the <b>Reason For Final Recommendation</b> field, enter reasons for the <b>Committee Final Recommendation in Priority Order</b> .
6.	In the <b>Status</b> field, select <b>Complete; Pending</b> if incomplete.
7.	After reviewing and completing the form, click the <b>Save</b> command button.
PSP: Approval Form to Negotiate with Recommended PSC/ ECSO from Discussion Meeting (Interview)	
Step	Task
1.	From the <b>PSP Dashboard</b> , click the <b>Create</b> command button next to <b>Approval Form To Negotiate With Recommended PSC/ECSO From Discussion Meeting (Interview)</b> .
2.	Under the <b>Based on Discussion Meeting (Interview) Evaluation Composite</b> section in the <b>Recommended Firm</b> field, click the drop-down and select <b>Recommended Firm</b> .
3.	For RFP (CM/P&A) Only: Under the <b>Based on Discussion Meeting (Interview) Evaluation Composite</b> section in the <b>All Pricing Proposals opened</b> field, click the drop-down and select <b>Yes, if all Pricing Proposals</b> are opened.
4.	For RFP (CM/P&A) Only: Under the <b>Based on Discussion Meeting (Interview) Evaluation Composite</b> section in the <b>All Pricing Proposals attached to this form</b> field, click the drop-down and select <b>Yes, if all Pricing Proposals</b> are uploaded in the <b>Attachments</b> section.
5.	Under the <b>Based on Discussion Meeting (Interview) Evaluation Composite</b> section in the <b>Reason For Recommendation</b> field,

	<ul style="list-style-type: none"><li>• If <b>Yes</b>, select the radio button for an appropriate <b>Reason for Recommendation</b>. Enter an explanation in the <b>Reason For Recommendation Comments</b> field..</li><li>• If <b>No</b>, enter an explanation in the <b>Reason For Recommendation Comments</b> field.</li></ul>
6.	In the <b>Attachments</b> section, upload documents, if necessary. <ul style="list-style-type: none"><li>• For RFP (CM/P&amp;A) only, upload all Pricing Proposals.</li></ul>
7.	Under the <b>Approval Section</b> in the <b>Committee Chair</b> field, select <b>Yes; Pending</b> if incomplete.
8.	In the <b>Comments</b> field, enter comments, if necessary.
9.	Review and complete the form; click the <b>Save</b> command button.

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STEP #4 PSC/ESCO FEE APPROVAL	
PSP: Professional Services/ ESCO Approval Request (Not Required for Retainer Professional Services Selections.)	
Step	Task
1.	From the <b>PSP Dashboard</b> , Click the <b>Create</b> command button next to <b>Professional Services Approval Request</b> .
2.	Enter the <b>Address, City, State, and Zip Code</b> of the firm.
3.	In the <b>Estimated Construction Budget From FCPWeb</b> field, enter the estimated construction budget for the project. <ul style="list-style-type: none"> <li>The estimated construction budget must include all construction budget items, except any contingencies and reserve.</li> </ul>
4.	Under the <b>Phases Included On PSA</b> section, enter the fee amount for each phase.
5.	For EPC Only: In the <b>EAA Fee</b> field, enter the proposed Fee for the project.
6.	Under the <b>Phases Included On PSA</b> section in <b>Basic Services Fee Is Within Range Of The University's Scope/Fee Policy</b> field, click the drop-down and select <b>Yes or No</b> . <ul style="list-style-type: none"> <li>Ensure that <b>Base Fee Compensation Range</b> is within the range of the University's Scope/Fee Policy. Visit the UOCP&amp;RES website for current information.</li> <li>If <b>No</b>, comments must be included in the <b>Reason For Recommendation</b> field.</li> <li>For RFP (CM/P&amp;A) only, select N/A, if there is no Basic Services Fee.</li> </ul>
7.	In the <b>Attachments</b> section, upload files, if necessary.
8.	Under the <b>Approval Section</b> in the <b>Committee Chair</b> field, select <b>Yes; Pending</b> , if incomplete.
9.	In the <b>Comments</b> field, enter comments, if necessary.
10.	Review and complete the form, click the <b>Save</b> command button.

The PSP system can also be accessed from the UOCP&RES Website:

1. Navigate to [www.uocpres.uillinois.edu](http://www.uocpres.uillinois.edu).
2. Land on the **Applications** tab.
3. Land on the **UI Staff** sub-menu.
4. Select the **PSP** link.