



Subcontractor/Material Supplier Declaration- A/E Agency/Higher-Ed

Purpose & Procedure

- ▶ The Subcontractor Supplier Declaration Business Process (BP):

- ▶ Provides for the submittal, review, and approval of the Professional Service Providers EDGE Consultants

- ▶ Workflow

Created by: **Associate** → Submitted to: **PM Declaration Review** → Sent to: **Associate Update (if necessary)** → Sent to: **PC Review** → Sent to: **Additional Information Hold (if necessary)** → Sent to: **PC Validation**

Create a New Subcontractor/Supplier Declaration Record

- ▶ In Oaks CI navigate to:
 - ▶ Logs -> Subcontractor/Supplier Declaration
 - ▶ Click New
 - ▶ Select Workflow (if applicable)

The screenshot shows the Oracle Primavera Unifier interface. The top navigation bar includes 'Home', 'Agency General...', 'Campus Resear...', and 'Northcoast Beh...'. The main menu on the left is expanded to show 'Logs', which is circled in red. Below 'Logs', the 'Subcontractor/Supplier Declaration' option is highlighted at the bottom, with a red arrow pointing to it. The right pane shows the 'Subcontractor/Supplier Declaration' screen with a 'New' button circled in red. Below the 'New' button, a table lists existing records:

Subcontractor/Supplier	Type
Bob's Concrete	Subcontractor
Bob's Concrete	Subcontractor
Bob's Concrete	Subcontractor
Bob's Concrete	Material Supplier
Bobs Concrete	Subcontractor
Bon's Concrete	Consultant
EDGE Contracting Services	Subcontractor
For Sonya	Subcontractor
Jeremy's Consulting	Consultant
brown	Material Supplier

Form Completion

- ▶ Complete General and the Declaration Information Blocks
- ▶ The Title should house the name of the company utilized

The screenshot shows a web browser window with the URL https://ohio-unifier.oracleindustry.com/bp/process/new?wftemplate_id=282&module_name=usd&csvimport=false&proj. The form is titled "Subcontractor/Supplier Declaration" and is divided into two main sections: "General" and "Declaration Information".

General Section:

- NOTE: Only select either Contract Name or Professional Services Name
- Organization: Department of Administrative Services
- Project Number: OCI-080001
- Project Name: Agency General Projects Test
- Project Location: OAKS CI Administration
- Title: Jeremy's Consulting *
- Record Number: (empty)
- Creation Date: (empty)
- Creator: Katie Tuttle
- Status: (empty)
- Tier 1: Yes (dropdown menu)
- Vendor Name: OCI Test General
- Contract Name: (empty)
- Professional Services Agreement: Test Agreement (dropdown menu)

Declaration Information Section:

- Type: Consultant *
- Subcontractor/Supplier: Jeremy's Consulting *
- Federal Tax ID: 44-444444 *
- Primary Officer 1: Jeremy Smith *
- Address Line 1: 30 W. Spring St. *
- Address Line 2: (empty) *
- City: Columbus *
- State: Ohio *
- ZIP: 43215 *
- Contact Person: Jeremy Smith *
- Phone No.: 614-555-5555 *
- Fax No.: na *
- E-mail Address: jsmith@email.com *

Annotations on the form:

- A red circle highlights the "General" tab.
- A red circle highlights the "Declaration Information" tab.
- A red box highlights the "Title" field, with a red arrow pointing to it from a text box that says "Use the Tier 1 dropdown box to indicate if this is a Tier 1 Sub".
- A red box highlights the "Tier 1" dropdown menu.
- A red box highlights several fields in the "Declaration Information" section, with a red arrow pointing to it from a text box that says "Required fields have a red asterisk (*)".

At the bottom of the form, there are links for "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

Use the Tier 1 dropdown box to indicate if this is a Tier 1 Sub

Required fields have a red asterisk (*)

Form Completion

- ▶ Scroll down the form to complete the Additional Details block

The screenshot shows a web browser window with the following details:

- Browser: Google Chrome
- Page Title: Create New Subcontractor/Supplier Declaration - Project No. OCI-080001
- URL: https://ohio-unifier.oracleindustry.com/bp/process/new?wftemplate_id=282&module_name=usd&csvimport=false&proj
- Form Title: Subcontractor/Supplier Declaration
- Section: General
- Fields (all with red asterisks):
 - type: Consultant
 - Subcontractor/Supplier: Jeremy's Consulting
 - Federal Tax ID: 44-444444
 - Primary Officer 1: Jeremy Smith
 - Address Line 1: 30 W. Spring St.
 - Address Line 2: (empty)
 - City: Columbus
 - State: Ohio
 - ZIP: 43215
 - Contact Person: Jeremy Smith
 - Phone No.: 614-555-5555
 - Fax No.: na
 - E-mail Address: jsmith@email.com
- Section: Additional Details (circled in red)
 - Subcontractor/P.O. Date: 04/08/2016 05:00 PM (UTC-5)
 - Subcontractor/P.O. Amount \$: 50,000.00
 - EDGE Certified Sub?: Yes (dropdown menu)
 - EDGE Certification Number: 123456789
 - MBE: Yes (dropdown menu)
- Section: Action Details
- Footer: Attachments (0), [Linked Records \(0\)](#), [General Comments](#), [Linked Mail \(0\)](#)

Callout Box (Red border, blue text):

If EDGE Certified Sub is YES, the EDGE Certification Number must be filled in.
If no, the field will be grayed out.

A red arrow points from the callout box to the 'EDGE Certified Sub?' dropdown menu.

Add General Comments

- ▶ Add General Comments as Necessary
 - ▶ Click the General Comments link located on the bottom of the record
 - ▶ Click Add
 - ▶ Enter Comments and Click OK
- ▶ General Comments become a permanent part of the record

Subcontractor/P.O. Amount \$: MBE:

Action Details

Create New Subcontractor/Supplier Declaration

To...

Cc...

Send For:

Task Notes:

Attachments (0) [Linked Records \(0\)](#) [General Comments](#)

General Comments - Google Chrome

<https://ohio-unifier.oracleindustry.com/bp/share/editGC?model=usd&t>

Close Window

Draft Comments

Text Comments Attachments Hidden Co

Add... Modify... Remove

Action Details

Submit

To...

Cc...

Send For: **PM Declaration Review**

Task Notes:

Attachments (0) [Linked Records \(0\)](#) [General Comments](#)

Send the Declaration for Review

- ▶ Add any attachments as necessary
- ▶ Select Submit in Workflow Actions
- ▶ Click Send to send the declaration for review

The screenshot displays the Oracle Industry Application interface for creating new subcontractor or supplier declarations. The browser window title is "Create New Subcontractor/Supplier Declarations K12 - Project No. SFC-080001 - Google Chrome". The URL is https://ohio-train-unifier.oracleindustry.com/bp/process/new?wftemplate_id=2956&module_name=usdk1&csvimport=fa. The application menu includes File, Edit, View, Actions, and Help. The "Workflow Actions" dropdown is set to "Submit", and the "Send" button is highlighted. The "Add Attachment" button is also visible. The form is titled "Subcontractor/Supplier Declarations K12" and is divided into several sections:

- General:** Complete one record for each subcontractor and material supplier used. Fields include Project Number (SFC-080001), Project Name (OAKS CI District Training Project 1), Organization Name (OAKS CI District Training Project - 1), Facility Name, Title (Jeremy's Consulting), Contract Name (District Training Test), Record Number, Creator (Katie Tuttle), Creation Date, Status, and Vendor Name (Dynamix Engineering).
- Declaration Information:** Fields include Type (Consultant), Tier 1 (Yes), Subcontractor/Supplier Name (Jeremy's Consulting), Subcontracted by, Federal Tax ID (44-444444), Contact Person (Jeremy Smith), Primary Officer (Jeremy Smith), Phone No. (614-555-5555), Address Line 1 (30 W. Spring St.), Fax No., Address Line 2, and Email Address (jsmith@email.com).
- Action Details:** The "Submit" button is highlighted. The "To" field is populated with "Barbara Taylor, Katie Tuttle, Moenique Morris, R...". The "Send For" field is set to "Declaration Review". A task due date of "02/09/2016" is also visible.

At the bottom of the form, there are links for "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

Once Workflow Action has been selected, note that the "to" box is now populated with the next person in the workflow

PM Declaration Approval Step

Project Manager (PM)

- ▶ Reviews the record and performs one of the following Workflow Actions:
 - ▶ **Return for Clarification:** Requests more information from the Associate (A/E)
 - ▶ **Recommend Approval:** Approves the records and sends it to the Contracts Administrator or Project Coordinator for Validation

PC Declaration Validation Step

- ▶ Project Coordinator (PC)
 - ▶ PC will review and Validate record
 - ▶ PC will attach any necessary documentation
 - ▶ Workflow Options:
 - ▶ Validated
 - ▶ Return for Clarification
 - ▶ Return for Subcontract
(Gives the PC the ability to return to the A/E for Subcontract attachment)
 - ▶ Reject

Validation

- ▶ Once the Subcontractor/Supplier Declaration is validated it will go to the Complete/End Step
- ▶ Note: To add a sub to the Contract SOV (Agreement for a PS Provider), or to a Change Order (Amendment), the Subcontractor/Supplier Declaration must be created and in the **Completed** status.

Questions?

Please contact OAKS CI Support Desk:

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