



Subcontractor/Material Supplier Declaration

Agency/Higher-Ed



Purpose & Procedure

- ▶ The Subcontractor Supplier Declaration Business Process (BP):
 - ▶ Provides for the submittal, review, and approval of contractor's subcontractors and material suppliers
 - ▶ Tracks important EDGE and subcontractor information once a subcontractor/supplier is approved
- ▶ Workflow
Created by: Contractor → Submitted to: A/E Review → Sent to: Contractor Update (if necessary) → Sent to: PM Declaration Approval → Sent to: PC Declaration Validation → Sent to: Contractor Validation Update and Subcontract Attachment (if necessary)

Create a New Subcontractor/Supplier Declaration Record

- ▶ In Oaks CI navigate to:
 - ▶ Logs -> Subcontractor/Supplier Declaration
 - ▶ Click Create

The screenshot displays the Oracle Primavera Unifier (Development) user interface. The top navigation bar shows 'Agency' and 'OAKS CI Training 4'. A left-hand menu is visible with 'Logs' highlighted, and a red circle around it. Below 'Logs', 'Subcontractor/Supplier Declaration' is selected, with a red arrow pointing to it from the text 'Subcontractor/Supplier De...'. On the right, the 'Subcontractor/Supplier Declaration' page is shown with a '+ Create' button circled in red. Below the button is a table with the following data:

Subcontractor/Supplier
2x General
123456
a
A1
AAA1
ABC Contracting
Air
Alfreds
ARL
Bailey's Iron Works
Bailey's Mechanical Services
Ben & Jerry's Concrete Comp
Ben & Jerry's Concrete Comp...
Ben & Jerry's Concrete Comp...
Ben & Jerry's Concrete Compar
Ben and Jerry's Concrete
Ben and Jerry's Concrete Com.
Ben and Jerry's Concrete Com.
Ben and Jerry's Concrete Com.
Big Dog Supplies
Bill's Concrete
billy bob
Billy Bob's Concrete
Blah Blah
Bob
Bob & Tom's Subcontracting
Bob's Bicycle
Bob's Burgers
bob's concrete
Bob's concrete
Bob's Concrete
Bob's Concrete
Bob's Concrete
Bob's Concrete
Bob's Concrete
Bob's Concrete
Bob's Concrete
Bob's Concrete
Bob's Concrete
Bob's Concrete
Total: 144

Form Completion

- ▶ Complete General section
- ▶ The Title should be the name of the company utilized

Subcontractor/Supplier Declaration - Bob's Concrete - Project No. OCI-090004 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/new?copy=1&attach=true&fromModel=usd&fromSource=simple&fromModelId=949&wfter

File Edit View Actions Help

Workflow Actions Submit Send Save Spelling.. Undo Accept Task Add Attachment Discussion Close Window

General Subcontractor/Supplier Declaration

General

NOTE: Only select either Contract Name or Professional Services Agreement Name. Tier1 Subcontractor Documentation must be attached as soon as it is available.

Organization: Department of Administrative Services Record Number:

Project Number: OCI-090004 Creation Date:

Project Name: OAKS CI Training 4 Creator: [Katie Tuttle](#)

Project Location: 4200 Surface Road Status:

Title: Bob's Concrete *

Contract Name: Training 1 Select... *

Contractor Name: R. W. Setterlin Building Company

Professional Services Agreement Name:

Declaration Information

Type: Subcontractor * Tier 1: Yes *

Subcontractor/Supplier: Bob's Concrete * Subcontracted by:

Federal Tax ID: 32-100 *

Action Details

Submit

To... Archana Atrey,Barbara Taylor,Bill Schwerfager

Cc...

Send For: Associate Declaration Review

Task Notes:

Workflow Progress

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

Required fields have a red asterisk (*)

Form Completion

- ▶ Complete the Declaration Information block
 - ▶ Use the Tier 1 dropdown box to indicate if this is a Tier 1 Sub

Subcontractor/Supplier Declaration - Bob's Concrete - Project No. OCI-090004 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/new?copy=1&attach=true&fromModel=usd&fromSource=simple&fromModelId=949&wfter

File Edit View Actions Help

Workflow Actions Submit Send Save Spelling.. Undo Accept Task Add Attachment Discussion Close Window

General Subcontractor/Supplier Declaration

Declaration Information

Type: Subcontractor *

Subcontractor/Supplier: Bob's Concrete *

Federal Tax ID: 32-100 *

Primary Officer 1: John Doe *

Address Line 1: 4200 Surface Rd *

Address Line 2: *

City: Columbus *

State: Ohio *

ZIP: 43228 *

Contact Person: John Brown *

Phone No.: 614-368-9799 *

Fax No.: na *

E-mail Address: Bob@aol.com *

Tier 1: Yes *

Subcontracted by: *

Action Details

Submit

To... Archana Atrey,Barbara Taylor,Bill Schwertfager

Cc... *

Send For: Associate Declaration Review

Task Notes:

Workflow Progress

Attachments (0) Linked Records (0) General Comments Linked Mail (0)

Form Completion

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

Subcontractor/Supplier Declaration - Bob's Concrete - Project No. OCI-090004 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/new?copy=1&attach=true&fromModel=usd&fromSource=simple&fromModelId=949&wfter

File Edit View Actions Help

Workflow Actions Submit Send Save Spelling... Undo Accept

General Subcontractor/Supp

Phone No.: 614-368-9799 *

Fax No.: na *

E-mail Address: Bob@aol.com *

Additional Details

Subcontractor/P.O. Date: 06/23/2017 05:00 PM (UTC-8)

Subcontractor/P.O. Amount \$: 43,000.00 *

Services/Material Brands: Services *

Skilled Trade License No.:

DFSP Enrolled: Yes *

EDGE Certified Sub?: Yes *

EDGE Certification Number: 1255687

MBE: Yes

Publish Path

Documents uploaded from your desktop will be published in the Publish Path directory shown below.

FilePath: 0100 Acquisition/0140 Construction Cont

FilePath Suffix: Subs

Publish Path: 0100 Acquisition/0140 Construction Contractor/ R. W. Setterlin Building Company Subs

Action Details

Submit

To... Archana Atrey,Barbara Taylor,Bill Schwertfager

Cc...

Send For: Associate Declaration Review

Task Notes:

[Workflow Progress](#)

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

Send the Declaration for Review

- ▶ Verify Workflow Action
- ▶ Click Send

Subcontractor/Supplier Declaration - Bob's Concrete - Project No. OCI-090004 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/flow?copy=1&attach=true&fromModel=usd&fromSource=simple&fromModelId=949&wfter

File Edit View Actions Help

Workflow Actions Submit Send Save Spelling.. Undo Accept Task Add Attachment Discussion Close Window

General Subcontractor/Supplier Declaration

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Skilled Trade License No.: MBE: Yes

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Action Details

Submit

To... Archana Atrey, Barbara Taylor, Bill Schwerfager

Cc...

Send For: Associate Declaration Review

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

Action Details has changed to Submit and notes the next step in the workflow

A/E (Associate) Declaration Review Step

- ▶ The A/E will receive an email notification that they have a New Task
- ▶ Within 2 days:
 - ▶ Reviews the declaration for completeness and compliance with the contract documents
 - ▶ Performs one of the following Workflow Actions:
 - ▶ **Return for Clarification:** Send the record back to the Contractor for additional information and update
 - ▶ **Recommend Approval:** Recommends Approval by sending the record to the Project Manager

PM Declaration Approval Step

Project Manager (PM)

- ▶ Within 3 days:
 - ▶ 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
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, or to a Change Order, the Subcontractor/Supplier Declaration must be created and in the **Completed** status.

Questions?

OAKS CI Support Desk Contact Info:

oaksci@ofcc.ohio.gov

614.644.2211