

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
- The Subcontractor Supplier Declaration BP is also used to submit subcontractors or consultants of professional services providers that contribute to meeting the provider's EDGE participation goal.

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)

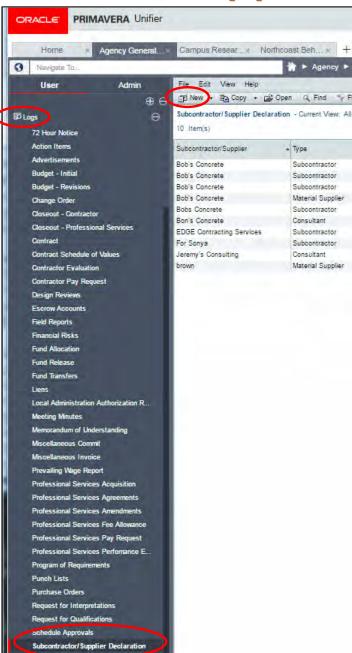
Roles & Responsibilities

Contractor

- Creates the declaration and submits it for review
- Provides additional information regarding EDGE participation and subcontractor payrolls
- A/E (Associate)
 - Reviews the initial declaration for compliance with contract documents
- Project Manager (PM)
 - Reviews the declaration and accepts or rejects use of the subcontractor/supplier
- Contracts Administrator/Project Coordinator
 - Reviews and validates the declaration for Drug Free Work Place (DFWP) enrollment and FDGF status

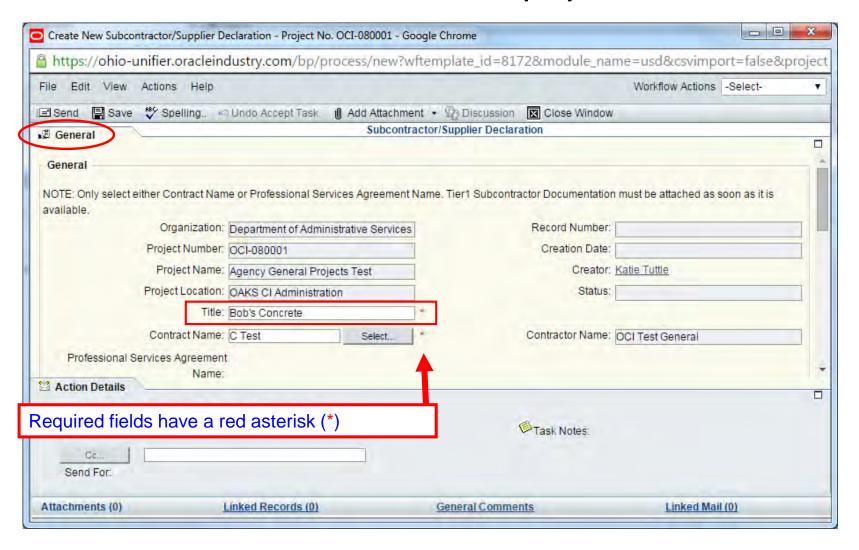
Create a New Subcontractor/Supplier Declaration Record

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



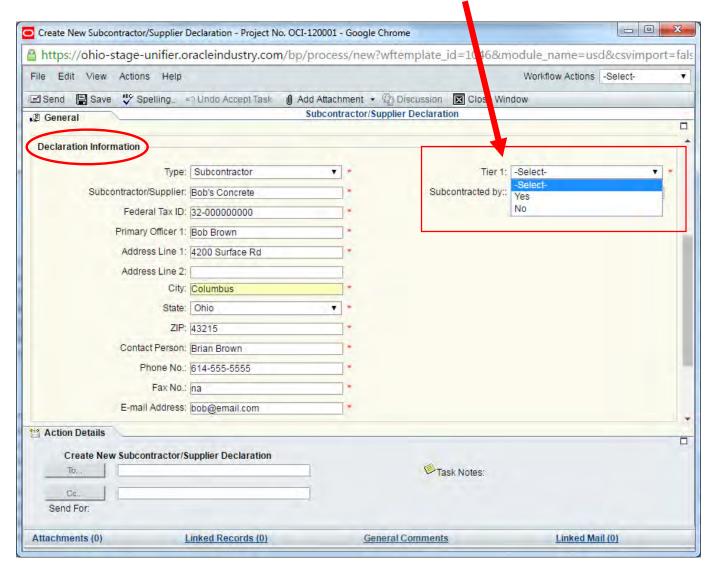
Form Completion

- Complete General Block
- The Title should house the name of the company utilized



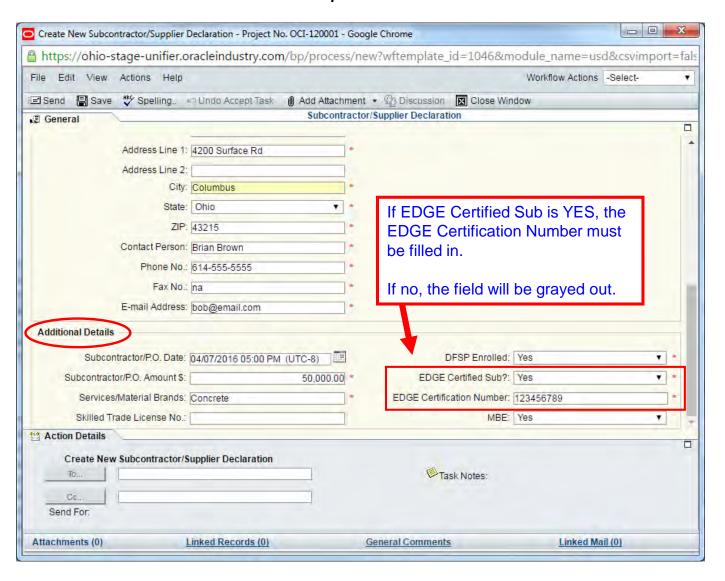
Form Completion

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



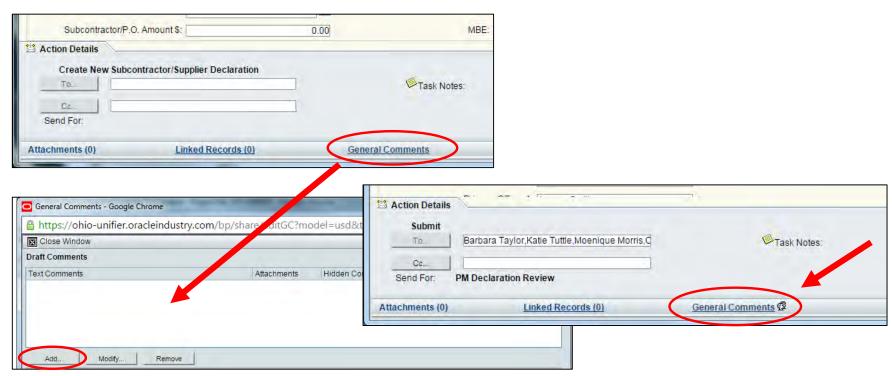
Form Completion

Scroll down the form to complete the Additional Details block



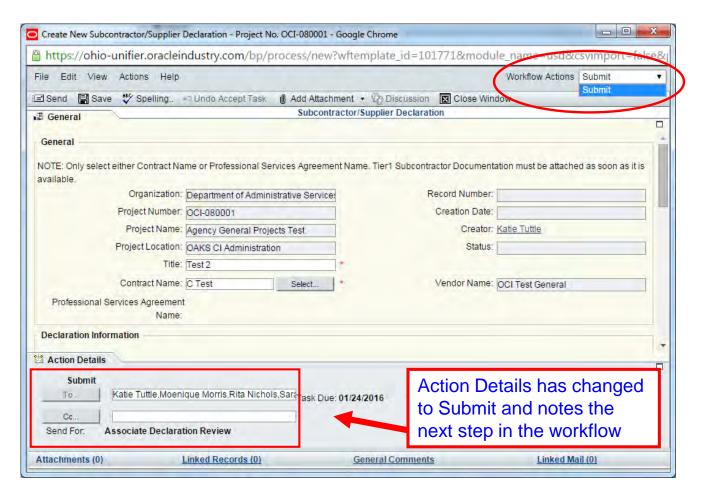
Add General Comments

- 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



Send the Declaration for Review

- Select Submit in Workflow Actions
- Click Send to send the declaration for review
- Click OK on the Notification window



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

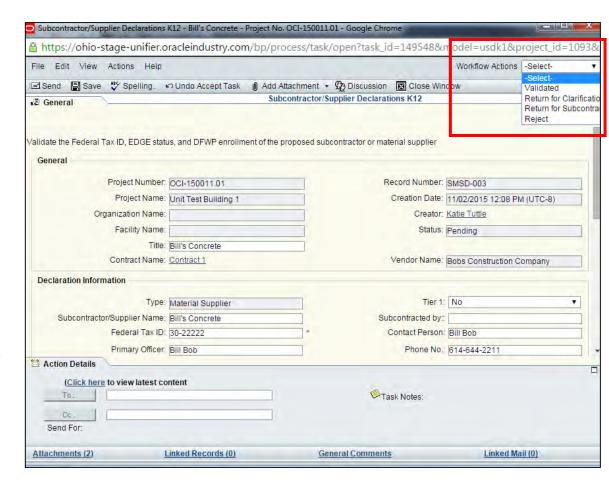
PM Declaration Approval Step

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 (Gives the PC the ability to return to the Contractor 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, or to a Change Order, the Subcontractor/Supplier Declaration must be created and in the Completed status.

Questions?

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