

Subcontractor/Material Supplier Declarations Energy



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

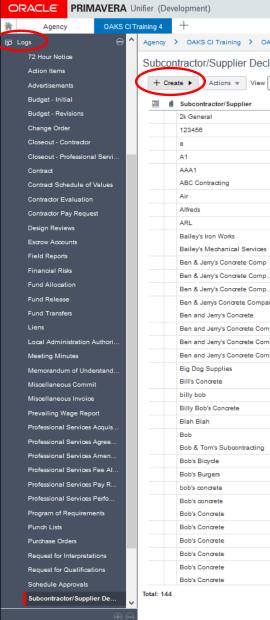
Workflow

Created by: Contractor → 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 PRIMAVERA Unifier (Development)

In Oaks CI navigate to:

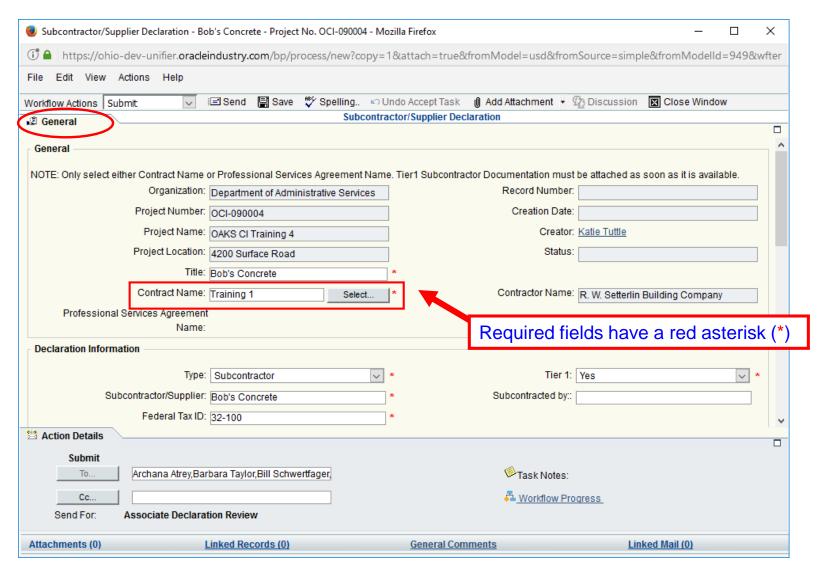
- Logs -> Subcontractor/ Supplier Declaration
- Click Create





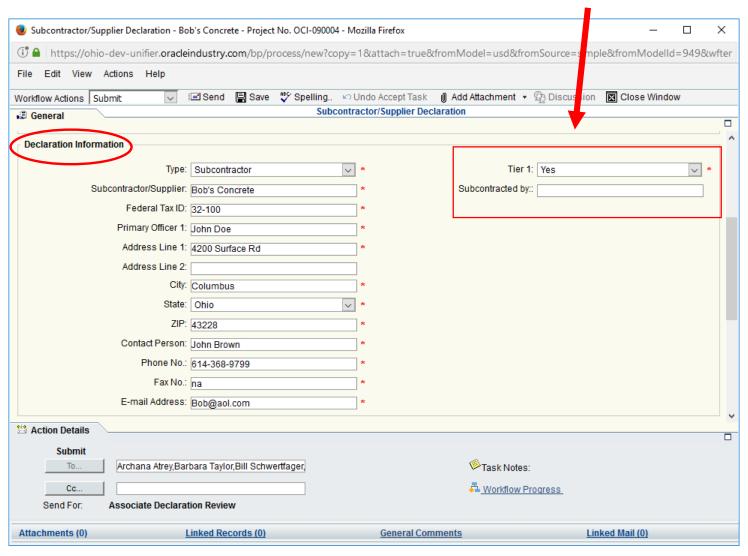
Form Completion

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



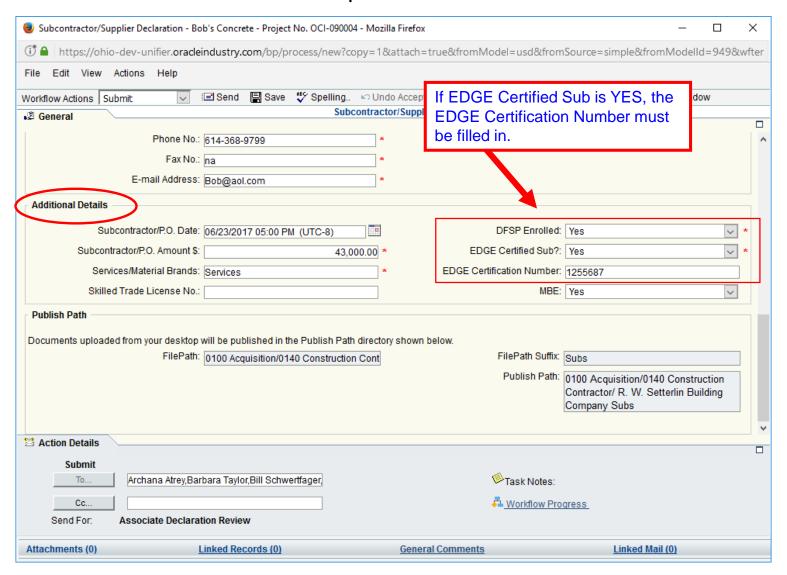
Form Completion

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



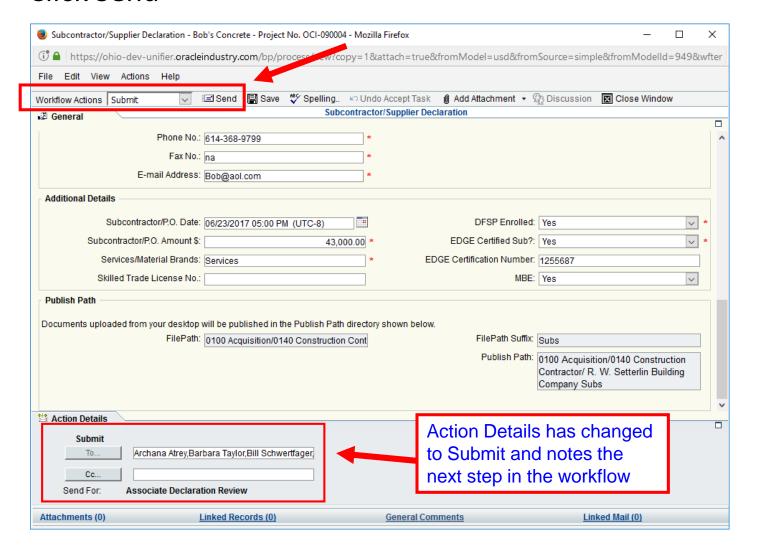
Form Completion

Scroll down the form to complete the Additional Details block



Send the Declaration for Review

- Verify Workflow Action
- Click Send



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?

Please contact OAKS CI Support Desk:

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