



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)**

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 *

Federal Tax ID: 32-100 *

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 \(0\)](#)

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

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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

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File Edit View Actions Help

Workflow Actions Submit Send Save Spelling... Undo Accept

General Subcontractor/Suppl

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

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General Subcontractor/Supplier Declaration

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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

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:

oaksci@ofcc.ohio.gov

614.644.2211