



# Locally Funded Initiative MOU

K-12 Cloud

# Purpose & Procedure

- ▶ The Project Manager or Owner's Agent is responsible for the LFI MOU and for ensuring the LFI is correctly reflected on Contract SOV records.

- ▶ Workflow

Created by: PM, OA → Sent to: District Treasurer for Funding Plan → Sent to: PM for Signature → Sent to: OFCC Fiscal for Approval

# Create LFI MOU

- ▶ In Oaks CI navigate to:
  - ▶ Logs -> LFI MOU K12
  - ▶ Click New
  - ▶ Select Workflow

Select Workflow - Google Chrome

https://ohio-train-unifier.oracleindustry.com/bp/process/t

Select Workflow

Business Process: Locally Funded Initiative MOU

Workflow: Select

- Select
- LFI MOU
- Zero LFI

ORACLE PRIMAVERA Unifier

Katie Tuttle Sign Out

Home x Talawanda-CSD... x Brown - New K-12

Navigate To...

User Admin File Edit View Help

New Copy Open Find Filtered By

LFI MOU K12 - Current View: All

1 Item(s) Page 1 of 1 Display 100 Items Per Page

Stage	% Project Construction Fund	% Local Initiative Fund	Total LFI Estimate (\$)
Design Developme	85	15	\$7,500.00

Logs

Action Items K12

Advertisements K12

Applications for Payment ...

Budgets K12

Certified Payrolls K12

Closeout - Contractor K12

Contract K12

Contract Modification K12

Contract Schedule of Valu...

Design Reviews K12

Escrow Accounts K12

Field Reports K12

Fund Release K12

Fund Transfers K12

LFI MOU K12

Liens K12

Locally Funded Initiative ...

Meeting Minutes K12

# LFI MOU

- ▶ Complete all open fields
  - ▶ Fields marked with a red \* are mandatory
- ▶ Scroll down to continue entering information

Create New Locally Funded Initiative MOU - Project No. SFC-080001.01 - Google Chrome

https://ohio-train-unifier.oracleindustry.com/bp/process/new?wftemplate\_id=3033&module\_name=ulfim&csvimport=f

File Edit View Actions Help Workflow Actions -Select-

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

### LFI MOU

Locally Funded Initiative MOU

Use the LFI MOU Breakdown Spreadsheet to calculate the amounts. Complete the data fields and save the record as a draft, create a custom print for signatures, upload the spreadsheet and custom print to the document manager and attach to this record.

#### General

Project Number:	<input type="text" value="SFC-080001.01"/>	Record Number:	<input type="text"/>
Project Name:	<input type="text" value="Oak Hills Local Building Project"/>	Creator:	<input type="text" value="Katie Tuttle"/>
Organization Name:	<input type="text"/>	Creation Date:	<input type="text"/>
Facility Name:	<input type="text"/>	Status:	<input type="text"/>
County:	<input type="text"/>	Stage:	<input type="text" value="Design Development"/>
Title:	<input type="text" value="LFI MOU #1"/>		

#### OSFC Scope of Work

Include values from LFI Worksheet Lines A, M, S, and T

OSFC Scope of Work:

#### Action Details

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

# LFI MOU

- ▶ Continue entering information into open fields

The screenshot shows a web browser window titled "Create New Locally Funded Initiative MOU - Project No. SFC-080001.01 - Google Chrome". The address bar shows the URL: [https://ohio-train-unifier.oracleindustry.com/bp/process/new?wftemplate\\_id=3033&module\\_name=ulfim&csvimport=f](https://ohio-train-unifier.oracleindustry.com/bp/process/new?wftemplate_id=3033&module_name=ulfim&csvimport=f). The browser menu includes File, Edit, View, Actions, and Help. The page title is "Locally Funded Initiative MOU".

The form contains the following sections:

- Local Initiative Scope of Work**: A text input field labeled "Local Initiative Scope of Work:".
- Local Initiative Budget**: A section with the instruction "Include values from LFI Worksheet Lines F, N, Y and Z". It contains four input fields:
  - Construction Costs (\$): 5,000.00
  - Contingency (\$): 4,000.00
  - Non-Construction Costs (\$): 2,000.00
  - Total LFI Estimate (\$): 11,000.00
- Additional SqFt or Renovation Project Improvement**: A section with the instruction "Include values from LFI Worksheet Lines N and Y". It contains a text input field labeled "Additional SqFt Description:" and a numeric input field labeled "Additional SqFt Total Amount (\$):" with a value of 0.00.

At the bottom of the form, there are four tabs: "Action Details", "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

# LFI MOU

- ▶ Finish adding information
- ▶ **% Project Construction Fund and % Local Initiative Fund are Required and must = 100**

Create New Locally Funded Initiative MOU - Project No. SFC-080001.01 - Google Chrome

https://ohio-train-unifier.oracleindustry.com/bp/process/new?wftemplate\_id=3033&module\_name=ulfim&csvimport=f

File Edit View Actions Help Workflow Actions -Select-

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

**LFI MOU** Locally Funded Initiative MOU

**Material or Scope Upgrade LFIs**

Include values from LFI Worksheet Lines K and Z

Material or Scope Upgrade Description:

Material or Scope Upgrade Total Amount (\$): 0.00

**AE and CM Amendment Budget and Deadline**

Values within Line BB of LFI Worksheet

A/E and CM Amendment Budget and Deadline:

**Proportional Sharing Percentages**

Check these values! The sum of all construction contracts times the LFI % should equal the Construction Cost LFI Budget shown above.

% Project Construction Fund: 68 \* % Local Initiative Fund: 32 \*

Proportion Check (Must = 100): 100

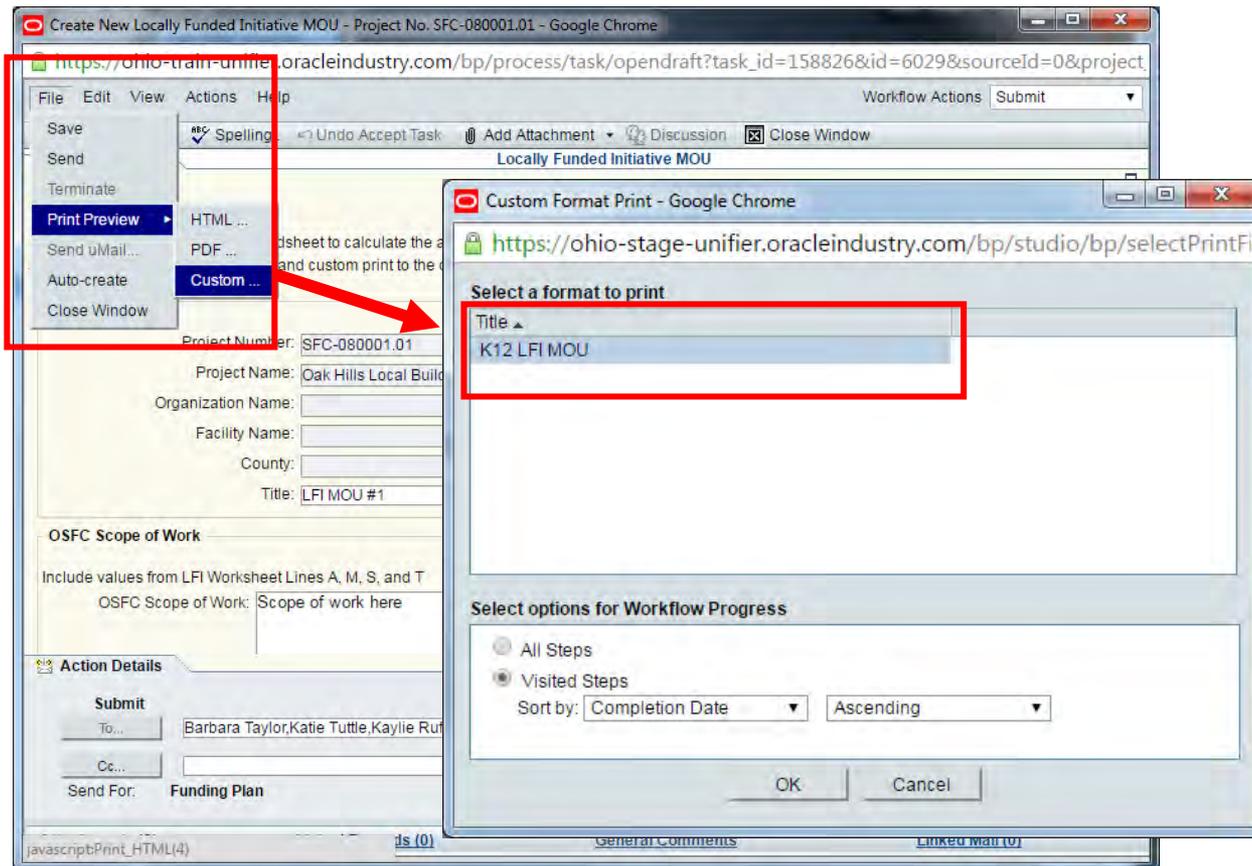
LFI Fund(s) and Cost Center(s):

Action Details

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

# Create Custom Print

- ▶ Once all of the information is filled in you will create a Custom Print of the record for Signature
- ▶ Click File -> Print Preview -> Custom Print
- ▶ Highlight Title (K12 LFI MOU) -> Click OK



# Edit Custom Print

- ▶ Open the word document that is created and save it to your computer.
- ▶ Many OAKS CI custom format documents contain blanks that could not be populated from the selected record. These must be edited by hand prior to distributing the document
- ▶ Review the entire document, editing as necessary.

Form Agreement – Local Funded Initiatives		
Ohio School Facilities Commission Forms and Documents		
LFI Stage	Design Development	
School District:		
County Name:		
Building Name:		
OSFC Scope of Work: -Include values from LFI Worksheet Lines A, M, S, and T		
Local Initiative Scope of Work and Project Name:	Brown - New K-12	
Local Initiative Budget: - Include values from LFI Worksheet Lines, G, N, Y and Z	\$7,500.00	
Additional Square Footage or Renovation Project Improvement LFI's (Fixed Percentage of Costs) - Include values from LFI Worksheet Lines N and Y	\$0.00	
Material or Scope Upgrade LFI's (Add Alternate Bid) - Include values from LFI Worksheet Lines K and Z	\$0.00	
A/E and CM Amendment Budget and Deadline for Amendment: - Values within Line BB of LFI Worksheet		
LFI Fund(s) and Cost Center(s):		
Proportional Sharing Percentage of Additional Square Footage LFI's, Renovation Project Improvements and integral scope of work:	% Project Construction Fund 85.0	% Local Initiative Fund 15.0

The School District Funding Plan (Form A102) or Funding Verification (Form A103) is attached. A Local Initiative should not be included in design if there is any uncertainty of funding for the Local Initiative. By exception, the Commission may approve continuing to the next design phase with only a portion of the required funding in the Local Initiative Fund, if the Commission determines that the School District's plan for depositing the remaining funds in a timely manner does not present significant risk. In any case, all funding must be in the Local Initiative Fund prior to bidding the work.

The timing of payments of the Local Initiatives portion of shared contracts should be determined by the treasurer. Generally, payments should be spread over the time span of the contract, or approximate the completion of the Local Initiative. In no case shall the School District Treasurer pay all the invoices of a contract with project funds, and then only pay the final invoices with local initiative funds.

If a cost overrun occurs or change orders are approved by the Commission and School District to Fixed Percentage Contracts, the costs will be proportionally shared by the Project Construction Fund and the Local Initiative Fund according to the same percentage shares as listed for those contracts, shown above in this Memorandum of Understanding. In the event of a cost under-run or deduct change order to Fixed Percentage Contracts, the contributions of the Project Construction Fund and Local Initiative Fund will be reduced according to the same percentage shares as listed for those contracts, shown above in this Memorandum of Understanding.

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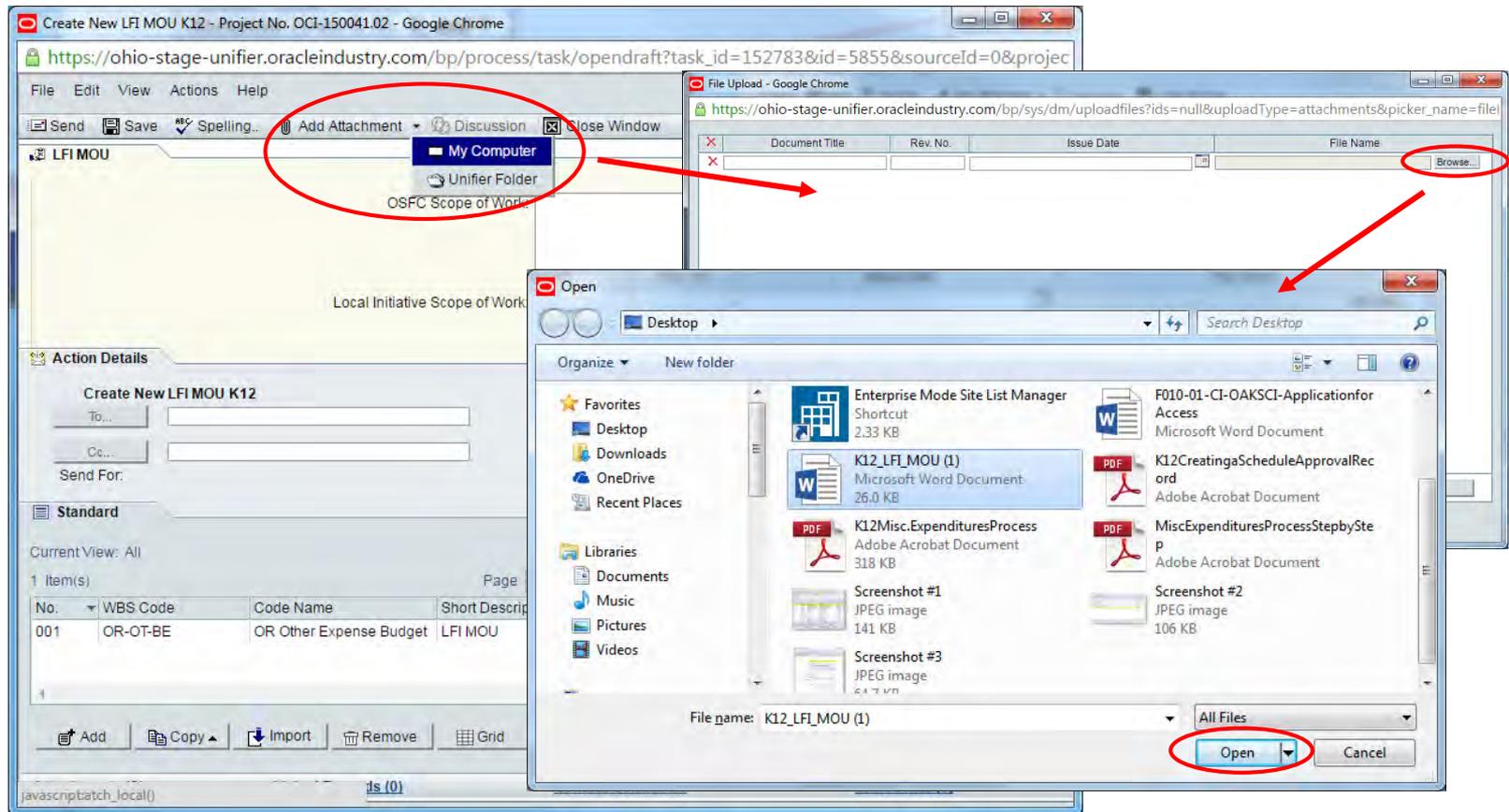
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Form Agreement – Local Funded Initiatives																																	
Ohio School Facilities Commission Forms and Documents																																	
<p>The calculation of cost overruns or under-runs include all shared hard and soft costs of the project. For Fixed Percentage contracts, change orders may be designated as fully project-funded or fully local initiative-funded only in extraordinary circumstances, by agreement from both owners, when the change order involves a substantial change of scope that unarguably is connected to only project-funded work or local initiative-funded work.</p> <p>Material or Scope Upgrade Local Initiatives shall be defined as a specific dollar amount. The project team shall review all change orders and assign to the School District all costs related to the material or scope upgrade local initiative.</p> <p>The School District and Commission agree to the terms and conditions provided in this Memorandum of Understanding for the Local Funded Initiative.</p>																																	
<table border="1"> <thead> <tr> <th colspan="2">SCHOOL DISTRICT</th> <th colspan="2">OHIO SCHOOL FACILITIES COMMISSION</th> </tr> <tr> <th colspan="4">COUNTY</th> </tr> </thead> <tbody> <tr> <td>By:</td> <td></td> <td>By:</td> <td></td> </tr> <tr> <td></td> <td>Superintendent</td> <td></td> <td>Project Administrator</td> </tr> <tr> <td>Date:</td> <td></td> <td>Date:</td> <td></td> </tr> <tr> <td>By:</td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td>Treasurer</td> <td></td> <td></td> </tr> <tr> <td>Date:</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>		SCHOOL DISTRICT		OHIO SCHOOL FACILITIES COMMISSION		COUNTY				By:		By:			Superintendent		Project Administrator	Date:		Date:		By:					Treasurer			Date:			
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<p>For POR, SD, DD, or CD MOU complete Form A102 or A103 For Revised Post-Bid MOU complete Form A103</p>																																	

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# Attach Signed Document to Record

- ▶ **Once you have made all necessary edits:**
  - ▶ Save the completed document to your computer.
  - ▶ Print the LFI MOU document
  - ▶ Sign the document
  - ▶ Scan the signed document back into your computer
  - ▶ Attach the signed document to the LFI MOU record



# Submit LFI MOU

- ▶ Attached document will show at the bottom of the record
- ▶ Send the record forward by choosing the Workflow Action: Submit
- ▶ “To” box will populate with recipient of record
- ▶ Click Send

Workflow Actions: Submit

Submit

LFI MOU K12

Use the LFI MOU Breakdown Spreadsheet to calculate the amounts. Complete the data fields and save the record as a draft, create a custom print for signatures, attach the spreadsheet and custom print to this record

General

Project Number: OCI-150041.02 Record Number: [ ]

Action Details

Submit

To... Ashwin Dasanahalli,Bill Schwertfager,Bilo Tho

Cc... [ ]

Send For: Funding Plan

Task Notes:

Standard

Current View: All

1 Item(s) Page 1 of 1 Display 100 Items Per Page

No.	WBS Code	Code Name	Short Description	Amount (\$)
001	OR-OT-BE	OR Other Expense Budget	LFI MOU	\$15,000.00

Total Amount: \$15,000.00

Attachments (1) Linked Records (0) General Comments Linked Mail (0)

# Funding Plan Step- District Treasurer

# Receive an Email

Thu 6/23/2016 8:48 AM

Unifier - Katie Tuttle,soo <unifier\_notifications@oracle.com>  
LFI MOU K12 LFI\_MOU-02 is sent to you for Funding Plan.

To Tuttle, Katie

If there are problems with how this message is displayed, click here to view it in a web browser.

This is a system-generated e-mail message. Do not reply to sender.

**Project/Shell: Brown - New K-12**

**LFI MOU K12 LFI\_MOU-02 is sent to you for Funding Plan.**

From : Katie Tuttle  
Sent For : Funding Plan

Source Name : Brown - New K-12  
Record No : LFI MOU K12 LFI\_MOU-02  
Title : LFI MOU test #2

**Unifier Login**

For Oracle technical assistance <http://www.oracle.com/us/support>

# Access Your Project

- ▶ The quickest and easiest way to access your project is to type your project name or number into the navigation bar on your Cross Project Homepage

The screenshot shows the Oracle Primavera Unifier web interface. At the top, the Oracle logo and 'PRIMAVERA Unifier' are visible. The user 'Katie Tuttle' is logged in, with options for a star, help, and sign out. The browser tabs show 'Home', 'Talawanda-CSD...', and 'Brown - New K-12'. The search bar contains 'oci'. Below the search bar, a 'Matched Locations' table is displayed. To the right, a sidebar shows 'Items Requiring Your Attention' with counts for tasks, messages, draft records, and emails. At the bottom, a table titled 'Tasks or New uMails:' provides a summary of tasks and emails for each project.

Project Number	Name	Tasks	uMails	Company Name
OCI-150041.03	Brown - New K-12 Second Chance	1 Total, 1 New, 0 Late		State of Ohio
OCI-150041.02	Brown - New K-12	3 Total, 2 New, 0 Late		State of Ohio
OCI-150041	Brown-LSD-CAR-ENP-2012	1 Total, 1 New, 0 Late		State of Ohio
OCI-150011.01	Unit Test Building 1	1 Total, 0 New, 0 Late		State of Ohio
OCI-140363.01	Talawanda- Kramer Elementary	9 Total, 3 New, 0 Late		State of Ohio

# Task Action

- ▶ To take action on your Task navigate to:
  - ▶ Collaboration
  - ▶ Tasks
- ▶ Double-click the LFI MOU record to open

The screenshot shows the Oracle Primavera Unifier web interface. The top navigation bar includes the Oracle logo, the text 'PRIMAVERA Unifier', and the user name 'Katie Tuttle' with a star icon, a help icon, and a 'Sign Out' link. Below the navigation bar is a breadcrumb trail: 'Home > Talawanda- Kra... > Brown - New K-12 > +'. The main content area is titled 'Tasks - Current View: All' and shows a table with 3 items. The first item, 'LFI MOU K12', is highlighted with a red box and a red arrow. The table columns are: Type, Number, Title, Re Du, From, and Sent for. The 'Collaboration' menu item in the left sidebar is circled in red.

Type	Number	Title	Re Du	From	Sent for
LFI MOU K12	LFI_MOU-02	LFI MOU		Katie Tuttle,so	Funding Plan
LFI MOU K12	LFI_MOU-01	Test LF		Katie Tuttle,so	Funding Plan
Request for Interpretation K12	RFI-0001	Reques		Katie Tuttle,so	Change Order Request

# Task Action

- ▶ Click Accept Task to begin work on your Task

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

- Browser Title:** LFI MOU K12 - Test LFI MOU - Project No. OCI-150041.02 - Google Chrome
- URL:** https://ohio-stage-unifier.oracleindustry.com/bp/process/task/open?task\_id=152788&parent\_id=0&viewOnly=0&project
- Buttons:** Accept Task (circled in red), Decline Task, Close Window
- Task Title:** LFI MOU K12
- General Section:**
  - Project Number: OCI-150041.02
  - Record Number: LFI\_MOU-01
  - Project Name: Brown - New K-12
  - Creator: Katie Tuttle
  - Organization Name: [Empty]
  - Creation Date: 04/20/2016 08:51 AM (UTC-8)
  - Facility Name: [Empty]
  - Status: Pending
  - County: [Empty]
- Task Details Section:**
  - From: Katie Tuttle
  - To: District Treasurer: Ashwin Dasanahalli
  - Task Due Date: [Empty]
  - Task Status: Not Started
  - Sent For: Funding Plan
  - Task Notes (0)
- Standard Section:**
  - Current View: All
  - Show Currency in: Transaction Currency
  - 1 Item(s)
  - Page 1 of 1
  - Display 100 Items Per Page
- Table:**

No.	WBS Code	Code Name	Short Description	Amount (\$)
001	OR-OT-BE	OR Other Expense Budget	LFI MOU	\$15,000.00
- Total Amount:** \$15,000.00
- Footer:** Attachments (1), Linked Records (0), General Comments, Linked Mail (0)

# Print and Sign MOU

- ▶ **Treasurer:** Print the attached MOU, sign, and obtain signature from District Superintendent

The screenshot displays two overlapping browser windows from Oracle EBS. The background window shows the 'LFI MOU K12' record page with a 'General' tab and 'Action Details' section. The foreground window shows the 'Attachments' page for the same record, listing one attachment: 'K12\_LFI\_MOU (1).docx' (27 KB). A red arrow points to this attachment, and a red box contains the text 'Double-click to open'. At the bottom of the main window, the 'Attachments (1)' tab is circled in red.

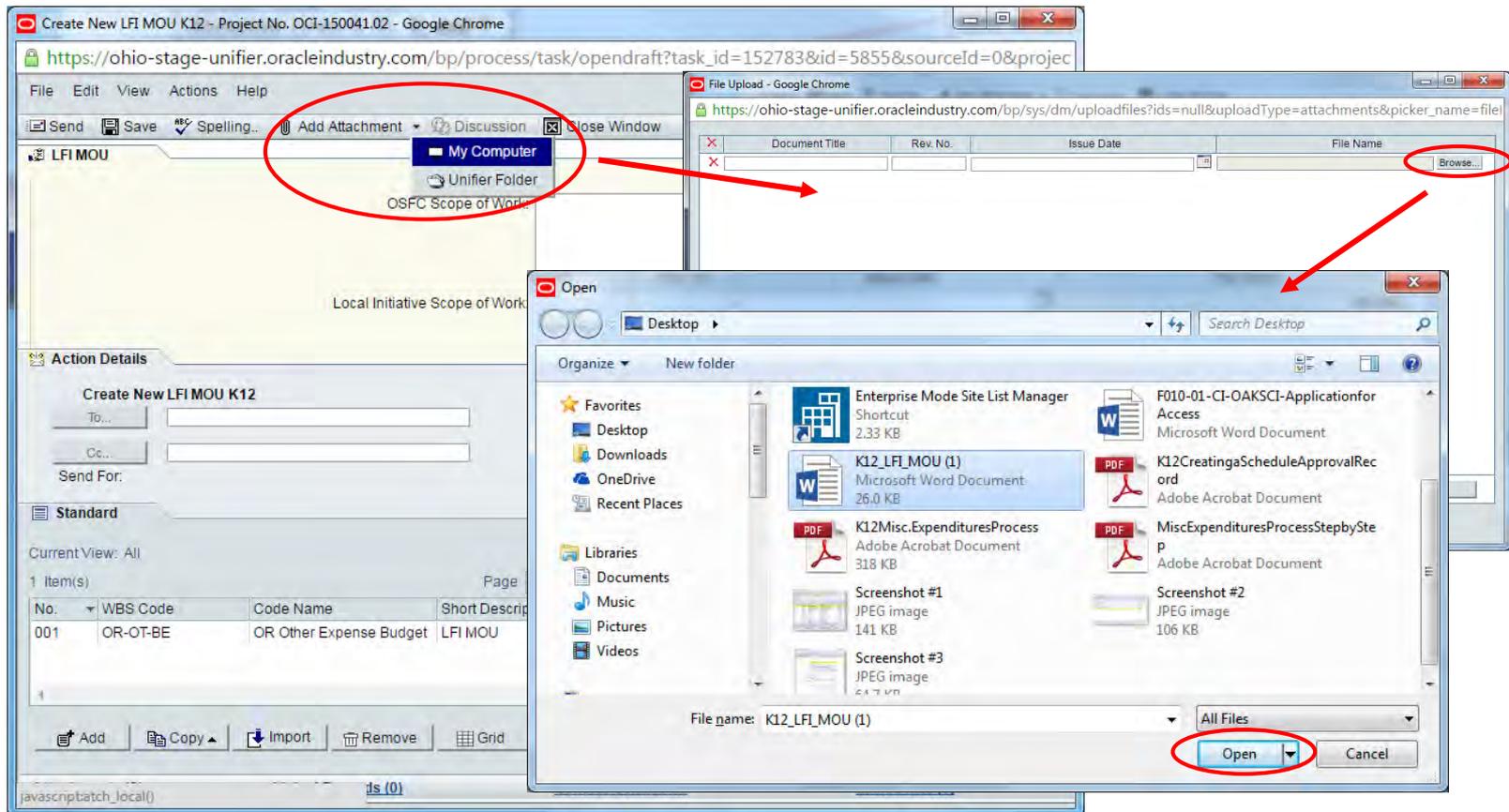
**Attachments - Current View: All**

	Title	File Name	Revision No	Issue Date	Size
		K12_LFI_MOU (1).docx			27 KB

**Attachments (1)**    **Linked Records (0)**    **General Comments**    **Linked Mail (0)**

# Attach Signed Document to Record

- ▶ **Once you have signed and obtained Superintendent signature:**
  - ▶ Scan the signed document back into your computer
  - ▶ Attach the signed MOU to the LFI MOU record
  - ▶ **You will also need to attach the Funding Plan documentation**



# Complete Information

- ▶ Scroll down to the Proportional Sharing Percentages section
- ▶ Enter LFI Fund(s) and Cost Center(s) information

LFI MOU K12 - Test LFI MOU - Project No. OCI-150041.02 - Google Chrome

https://ohio-stage-unifier.oracleindustry.com/bp/process/task/open?task\_id=152788&model=ulfi&project\_id=1097&initi

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling... Add Attachment Discussion Close Window

LFI MOU LFI MOU K12

AE and CM Amendment Budget and Deadline

Values within Line BB of LFI Worksheet

A/E and CM Amendment Budget and Deadline:

**Proportional Sharing Percentages**

Proportional Sharing Percentages of Additional Square Footage LFIs, Renovation Project Improvements and integral scope of work.

% Project Construction Fund: 85 % Local Initiative Fund: 15

Proportion Check (Must = 100): 100

LFI Fund(s) and Cost Center(s): \*

Action Details

Standard

Attachments (1) Linked Records (0) General Comments Linked Mail (0)

# Send the Record

- ▶ To send the record, choose Workflow Action: Sign MOU and Funding Plan
- ▶ Record will now go to OSFC for Signature
- ▶ Click Send

The screenshot shows a web application window titled "LFI MOU K12 - Test LFI MOU - Project No. OCI-150041.02 - Google Chrome". The URL is [https://ohio-stage-unifier.oracleindustry.com/bp/process/task/open?task\\_id=152788&model=ulfi&project\\_id=1097&initiateBF](https://ohio-stage-unifier.oracleindustry.com/bp/process/task/open?task_id=152788&model=ulfi&project_id=1097&initiateBF). The interface includes a menu bar with "File", "Edit", "View", "Actions", and "Help". Below the menu bar, there are several buttons: "Send", "Save", "Spelling...", "Add Attachment", "Discussion", and "Close Window". The "Send" button is circled in red. To the right, a "Workflow Actions" dropdown menu is open, showing "Sign MOU and Fu", "Sign MOU and Funding", and "Return for Clarification". The "Sign MOU and Funding" option is circled in red. Below the menu bar, the page title is "LFI MOU" and "LFI MOU K12". The main content area contains instructions: "Download the attached document, complete and sign the A-102 or A-103 form, sign the MOU, obtain the Superintendent's signature, then scan and attach the completed form to this record. Take the Sign MOU and Funding Plan work flow action..". Below this, there is a "General" section with fields for "Project Number: OCI-150041.02" and "Record Number: LFI\_MOU-01". The "Action Details" section is highlighted with a red box and contains the following information: "Sign MOU and Funding Plan (Click here to view latest content)", "To: Ashwin Dasanahalli,Bill Schwertfager,Bilo Tho", "Cc:", "Send For: OSFC Signature". Below the "Action Details" section, there is a "Standard" section with a table of items. The table has columns for "No.", "WBS Code", "Code Name", "Short Description", and "Amount (\$)". The table contains one row: "001", "OR-OT-BE", "OR Other Expense Budget", "LFI MOU", "\$15,000.00". Below the table, there are buttons for "Add", "Copy", "Import", "Remove", "Grid", and "Find". The "Total Amount:" is displayed as "\$15,000.00". At the bottom of the page, there are links for "Attachments (1)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

# Questions?

Please contact OAKS CI Support Desk:

[oaksci@ofcc.ohio.gov](mailto:oaksci@ofcc.ohio.gov)

614.644.2211