



# Subcontractor/Material Supplier Declaration- A/E K12 Cloud

# Purpose & Procedure

- ▶ The Subcontractor Supplier Declaration Business Process (BP):
  - ▶ Provides for the submittal, review, and approval of the Professional Service Providers EDGE Consultants

- ▶ Workflow

Created by: A/E → Submitted to: PM Declaration Review →  
Sent to: A/E Update (if necessary) → Sent to: PC Validation  
→ Sent to: Validation Update (if necessary)

# Creation Step

- ▶ **Professional Services Provider** (Identify Edge Consultant Only)
  - ▶ Creates one Subcontractor Supplier Declaration record for each EDGE Consultant involved in fulfilling their contract obligations
  - ▶ Add Attachments
    - ▶ Edge Affidavit (if applicable)
    - ▶ Executed Subcontract Form

# Create a New Subcontractor and Supplier Declaration Record

- ▶ In Oaks CI navigate to:
  - ▶ Logs -> Subcontractor/Supplier Declaration K12
  - ▶ Click New

The screenshot displays the Oracle Primavera Unifier web application interface. The browser tabs show 'Home', 'Talawanda-CSD...', and 'Brown - New K...'. The 'Navigate To...' field is empty. The 'User' menu is open, showing a list of navigation options. The 'Logs' option is circled in red. A red arrow points from the 'Logs' option to the 'Subcontractor/Supplier ...' option at the bottom of the list. The 'New' button in the top right corner of the application is also circled in red. The main content area shows a table titled 'Subcontractor/Supplier Declarations K12 - Current View: All' with 2 item(s). The table has columns for 'Subcontractor/Supplier', 'Type', and 'Contractor Name'. The data rows are:

Subcontractor/Supplier	Type	Contractor Name
BCL Enterprises	Consultant	SHP Leading D
GOP Limited	Consultant	SHP Leading D

# Form Completion

- ▶ Complete General and the Declaration Information Blocks
- ▶ The Title should house the name of the company utilized

**General**

Complete one record for each subcontractor and material supplier used.

Project Number: OCI-140363  
Project Name: Talawanda-CSD-BUT-CFAP-1-2013  
Organization Name: Talawanda CSD  
Facility Name:  
Title: Jeremy's Consulting  
Contract Name: Talawanda CSD - Kramer / Select... \*

Record Number:  
Creator: Katie Tuttle  
Creation Date:  
Status:  
Vendor Name: SHP Leading Design

**Declaration Information**

Type: Consultant \*  
Subcontractor/Supplier Name: Jeremy's Consulting \*  
Federal Tax ID: 44-444444 \*  
Primary Officer: Jeremy Smith \*  
Address Line 1: 30 W. Spring St. \*  
Address Line 2:  
City: Columbus \*  
State: Ohio \*  
ZIP: 43215 \*

Tier 1: Yes \*  
Subcontracted by::  
Contact Person: Jeremy Smith \*  
Phone No.: 614-555-5555 \*  
Fax No.: na  
Email Address: jsmith@email.com \*

**Action Details**

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

Use the Tier 1 dropdown box to indicate if this is a Tier 1 Sub

Required fields have a red asterisk (\*)

# Form Completion

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

The screenshot shows a web browser window with the title "Create New Subcontractor/Supplier Declarations K12 - Project No. OCI-140363 - Google Chrome". The URL is "https://ohio-stage-unifier.oracleindustry.com/bp/process/new?project\_id=1106&module\_name=usdk1&csvim". The browser's menu bar includes "File", "Edit", "View", "Actions", and "Help". Below the menu bar are icons for "Send", "Save", "Spelling...", "Undo Accept Task", "Add Attachment", "Discussion", and "Close Window".

The main form area is titled "Subcontractor/Supplier Declarations K12" and has a "General" tab selected. The form contains the following fields:

- Subcontractor/Supplier Name:  \*
- Federal Tax ID:  \*
- Primary Officer:  \*
- Address Line 1:  \*
- Address Line 2:
- City:  \*
- State:  \*
- ZIP:  \*
- Subcontracted by:
- Contact Person:  \*
- Phone No.:  \*

A red callout box with blue text points to the "EDGE Certified Sub?" field, stating: "If EDGE Certified Sub is YES, the EDGE Certification Number must be filled in. If no, the field will be grayed out." The "EDGE Certified Sub?" field is currently set to "Yes" and is highlighted with a red box. The "EDGE Certification Number" field is also highlighted with a red box and contains the value "123456789".

The "Additional Details" section is circled in red and contains the following fields:

- Subcontractor PO Date:  \*
- Subcontractor/P.O. Amount \$:  \*
- Services/Material Brands:  \*
- Skilled Trade License No.:  \*
- DFSP Enrolled:  \*
- EDGE Certified Sub?:  \*
- EDGE Certification Number:  \*
- MBE:  \*

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

# 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

Subcontractor/P.O. Amount \$:  MBE:

**Action Details**

Create New Subcontractor/Supplier Declaration

To...

Cc...

Send For:

Task Notes:

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

General Comments - Google Chrome

<https://ohio-unifier.oracleindustry.com/bp/share/editGC?model=usd&t>

Close Window

Draft Comments

Text Comments    Attachments    Hidden Co

Add...    Modify...    Remove

**Action Details**

Submit

To... Barbara Taylor,Katie Tuttle,Moenique Morris,C

Cc...

Send For: PM Declaration Review

Task Notes:

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

# Send the Declaration for Review

- ▶ Add any attachments as necessary
- ▶ Select Submit in Workflow Actions
- ▶ Click Send to send the declaration for review

The screenshot displays the Oracle Industry Application interface for creating new subcontractor or supplier declarations. The browser window title is "Create New Subcontractor/Supplier Declarations K12 - Project No. SFC-080001 - Google Chrome". The URL is [https://ohio-train-unifier.oracleindustry.com/bp/process/new?wftemplate\\_id=2956&module\\_name=usdk1&csvimport=fa](https://ohio-train-unifier.oracleindustry.com/bp/process/new?wftemplate_id=2956&module_name=usdk1&csvimport=fa). The application menu includes File, Edit, View, Actions, and Help. The toolbar contains buttons for Send, Save, Spelling, Undo, Accept Task, Add Attachment, Discussion, and Close Window. The Workflow Actions dropdown is set to Submit. The form is titled "Subcontractor/Supplier Declarations K12" and is divided into several sections:

- General:** Complete one record for each subcontractor and material supplier used. Fields include Project Number (SFC-080001), Project Name (OAKS CI District Training Project 1), Organization Name (OAKS CI District Training Project - 1), Facility Name, Title (Jeremy's Consulting), Contract Name (District Training Test), Record Number, Creator (Katie Tuttle), Creation Date, Status, and Vendor Name (Dynamix Engineering).
- Declaration Information:** Fields include Type (Consultant), Tier 1 (Yes), Subcontractor/Supplier Name (Jeremy's Consulting), Subcontracted by, Federal Tax ID (44-444444), Contact Person (Jeremy Smith), Primary Officer (Jeremy Smith), Phone No. (614-555-5555), Address Line 1 (30 W. Spring St.), Fax No., and Address Line 2. Email Address is jsmith@email.com.
- Action Details:** The Submit button is highlighted. The To field is populated with "Barbara Taylor, Katie Tuttle, Moenique Morris, R...". The Send For field is set to "Declaration Review".

At the bottom of the form, there are links for Attachments (0), Linked Records (0), General Comments, and Linked Mail (0). A red arrow points from the text box to the "To" field in the Action Details section.

Once Workflow Action has been selected, note that the "to" box is now populated with the next person in the workflow

# PM Declaration Approval Step

## Project Manager (PM)

- ▶ 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 A/E 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 (Agreement for a PS Provider), or to a Change Order (Amendment), the Subcontractor/Supplier Declaration must be created and in the **Completed** status.

# Questions?

Please contact OAKS CI Support Desk:

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

614.644.2211