



Subcontractor/Material Supplier Declaration-Contractor

K12 Cloud

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
 - ▶ 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 EDGE status

Creation Step

- ▶ Contractor
 - ▶ Creates one Subcontractor Supplier Declaration record for each subcontractor and material supplier or 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 K-12
 - ▶ Click New

The screenshot displays the Oracle Primavera Unifier web application interface. The browser address bar shows the URL 'Navigate To...'. The application title is 'ORACLE PRIMAVERA Unifier'. The main menu is visible, with 'Logs' highlighted in red. Below 'Logs', the 'Subcontractor/Supplier Declaration K-12' option is selected, and the 'New' button is circled in red. A red arrow points to the 'Subcontractor/Supplier Declaration K-12' option in the left-hand menu.

Subcontractor/Supplier	Type
Abbott Electric, Inc.	Subcontractor
Advanced Industrial Roofing	Subcontractor
Architectural Design Solutio	Consultant
Breckenridge Kitchen Equip	Subcontractor
Central-Allied Enterprises, I	Subcontractor
Contractor Connection, Inc.	Material Supplier
Contractor Connection, Inc.	Material Supplier
Contractor Connections, Inc	Material Supplier
Hammond Construction, Inc	Subcontractor
Hilscher-Clarke Electric Cor	Subcontractor
Jones Technologies	Material Supplier
LJM Enterprises, LLC	Material Supplier
Ladd Painting, Inc.	Subcontractor
Livi Steel, Inc.	Subcontractor
Mid South Prestress, LLC	Subcontractor
Minerva Tile & Remodeling,	Subcontractor
Mr. Excavator, Inc.	Subcontractor
Patella Carpet & Tile	Subcontractor
Petty Group, LLC	Subcontractor
Rath Builders Supplier Inc. (Material Supplier
Rath Builders Supply, Inc.	Material Supplier
Rath Builders Supply, Inc. (3	Subcontractor
Roman Plumbing Company,	Subcontractor
S.A. Comunale Co., Inc.	Subcontractor
Simplified Alternatives, Inc.	Material Supplier
Southern Cabinetry, Inc.	Material Supplier
Standard Plumbing & Heatir	Subcontractor
Stanley Miller Construction (Subcontractor
TC Randal Construction, LL	Material Supplier
Taylored Concrete	Subcontractor
The Beaver Excavating Con	Subcontractor

Form Completion

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

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

- Browser: Google Chrome
- Page Title: Create New Subcontractor/Supplier Declarations K12 - Project No. OCI-140363.01
- URL: https://ohio-stage-unifier.oracleindustry.com/bp/process/new?wftemplate_id=4014&module_name=usdk1&csvimport=false&project_id=110
- Form Title: Subcontractor/Supplier Declarations K12

The form is divided into two main sections:

- General** (circled in red):
 - Project Number: OCI-140363.01
 - Project Name: Talawanda- Kramer Elementary
 - Organization Name: Talawanda CSD
 - Facility Name: Kramer Elementary (Talawanda)
 - Title: Bob's Concrete *
 - Contract Name: Robertson Construction - C1 Select... *
 - Record Number: [Empty]
 - Creator: Katie Tuttle
 - Creation Date: [Empty]
 - Status: [Empty]
 - Vendor Name: Robertson Construction
- Declaration Information** (circled in red):
 - Type: Material Supplier *
 - Subcontractor/Supplier Name: Bob's Concrete *
 - Federal Tax ID: 32-0000000 *
 - Primary Officer: Bob Brown *
 - Address Line 1: 4200 Surface Rd. *
 - Address Line 2: [Empty]
 - City: Columbus *
 - State: Ohio *
 - ZIP: 43215 *
 - Tier 1: Yes *
 - Subcontracted by: [Empty]
 - Contact Person: Brian Brown *
 - Phone No.: 614-555-5555 *
 - Fax No.: na
 - Email Address: bob@email.com *

At the bottom, there is an "Action Details" section with "Create New Subcontractor/Supplier Declarations K12" and "Send For:" fields.

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-140363.01 - Google Chrome". The URL is "https://ohio-stage-unifier.oracleindustry.com/bp/process/new?wftemplate_id=40148&module_name=usdk1&csvimport=false&project_id=".

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

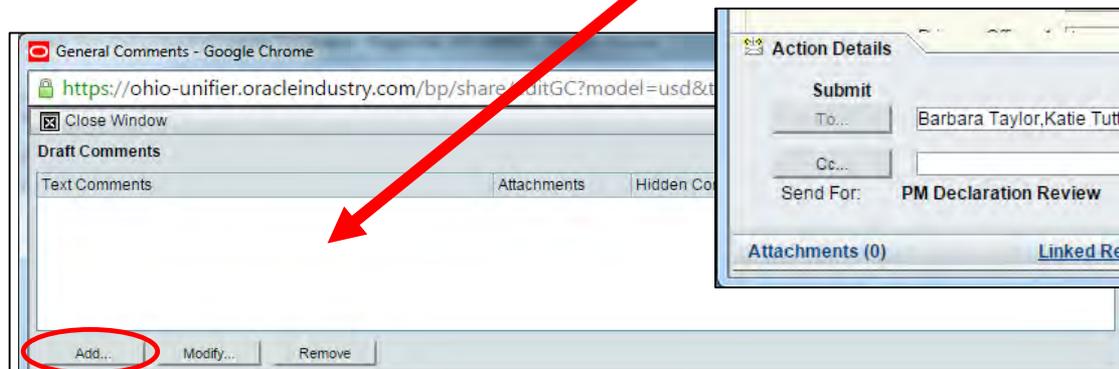
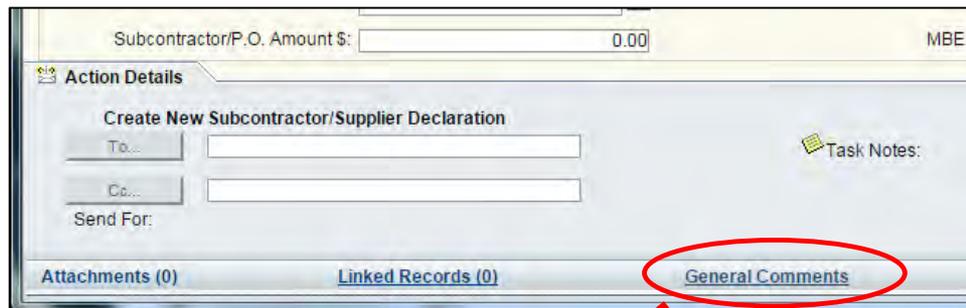
- Contract Name: Robertson Construction - C (dropdown)
- Vendor Name: Robertson Construction (text)
- Declaration Information section:
 - Type: Material Supplier (dropdown)
 - Tier 1: Yes (dropdown)
 - Subcontractor/Supplier Name: Bob's Concrete (text)
 - Federal Tax ID: 32-0000000 (text)
 - Primary Officer: Bob Brown (text)
 - Address Line 1: 4200 Surface Rd. (text)
 - Address Line 2: (text)
 - City: Columbus (text)
 - State: Ohio (dropdown)
 - ZIP: 43215 (text)
 - Contact Person: Brian Brown (text)
- Additional Details section (circled in red):
 - Subcontractor PO Date: 04/08/2016 (text)
 - Subcontractor/P.O. Amount \$: 50,000.00 (text)
 - Services/Material Brands: Concrete (text)
 - Skilled Trade License No.: 85208520 (text)
 - DFSP Enrolled: Yes (dropdown)
 - EDGE Certified Sub?: Yes (dropdown)
 - EDGE Certification Number: 123456789 (text)
 - MBE: Yes (dropdown)

A red callout box with blue text points to the "EDGE Certified Sub?" and "EDGE Certification Number" fields. The text in the callout box reads: "If EDGE Certified Sub is YES, the EDGE Certification Number must be filled in. If no, the field will be grayed out."

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



Send the Declaration for Review

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

Create New Subcontractor/Supplier Declaration - Project No. OCI-080001 - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/process/new?wftemplate_id=101771&module_name=usd&csvimport=false&j

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-080001 Creation Date:

Project Name: Agency General Projects Test Creator: Katie Tuttle

Project Location: OAKS CI Administration Status:

Title: Test 2 *

Contract Name: C Test Select... *

Vendor Name: OCI Test General

Professional Services Agreement Name:

Declaration Information

Action Details

Submit

To... Katie Tuttle, Moenique Morris, Rita Nichols, Sara... Task Due: 01/24/2016

Cc...

Send For: Associate Declaration Review

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

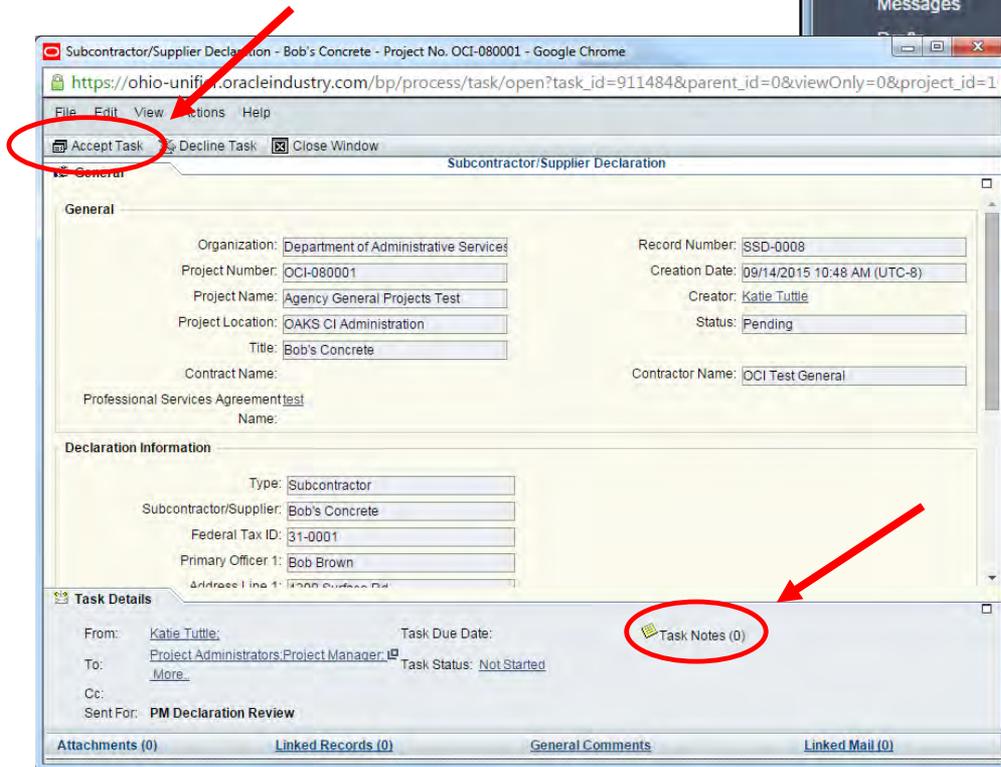
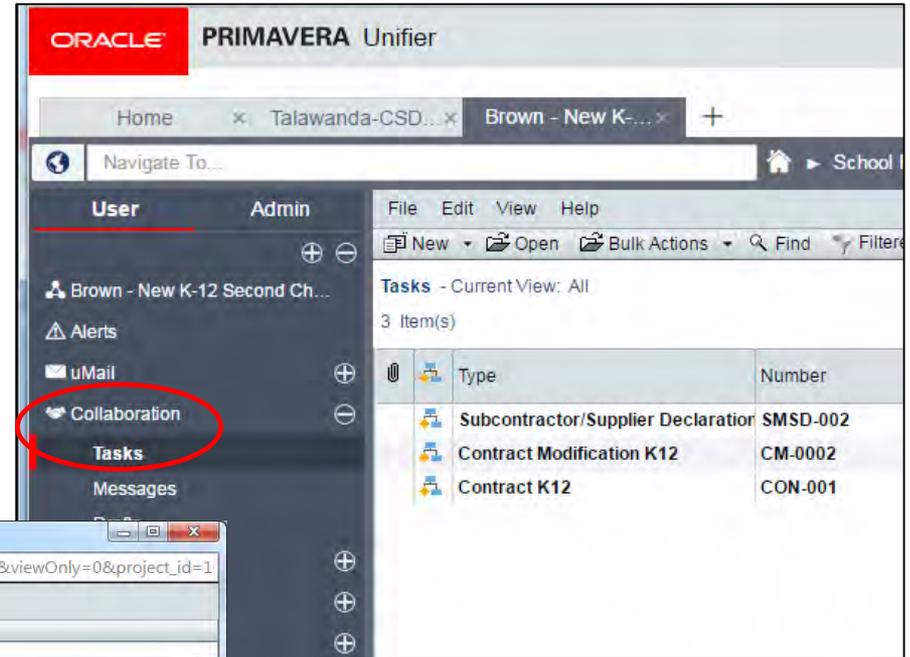
Action Details has changed to Submit and notes the next step in the workflow

A/E 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

Open the Record

- ▶ Login to Project and Navigate to: Collaboration -> Tasks
- ▶ The New Task is bolded
- ▶ Double Click to Open the Task
- ▶ Review any Task Notes
- ▶ Click Accept Task



Recommend Approval

- ▶ If the declaration is acceptable, select the Workflow Action: Recommend Approval
- ▶ Click Send

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

- Browser Title:** Subcontractor/Supplier Declaration - Bob's Concrete - Project No. OCI-080001 - Google Chrome
- URL:** https://ohio-unifier.oracleindustry.com/bp/process/task/open?task_id=909029&model=usd&project_id=1003&initiateBP=&bulkautoaccept=&fromRefLog=
- Menu:** File, Edit, View, Actions, Help
- Toolbar:** Send, Save, Spelling, Undo, Accept Task, Add Attachment, Discussion, Close Window
- Workflow Actions:** Recommend App, Reject, Recommend Approval, Return for Clarification
- General Section:**
 - Organization: Department of Administrative Services
 - Project Number: OCI-080001
 - Project Name: Agency General Projects Test
 - Project Location: OAKS CI Administration
 - Title: Bob's Concrete
 - Contract Name:
 - Professional Services Agreement Name: test#2
 - Record Number: SSD-0007
 - Creation Date: 09/08/2015 06:17 AM (UTC-8)
 - Creator: Katie Tuttle
 - Status: Pending
 - Contractor Name: OCI Test General
- Declaration Information Section:**
 - Type: Subcontractor
 - Subcontractor/Supplier: Bob's Concrete
 - Federal Tax ID: 31-0001
 - Primary Officer 1: Bob Brown
 - Address Line 1: 4200 Surface Rd
 - Address Line 2:
 - City: Columbus
 - State: Ohio
 - ZIP: 43215
- Action Details Section:**
 - Recommend Approval (Click here to view latest content)
 - To: Barbara Taylor, Katie Tuttle, Kaylie Ruff, Moeniq
 - Cc:
 - Send For: Declaration Review
- Footer:** Attachments (0), Linked Records (0), General Comments, Linked Mail (0)

Red annotations in the image include a red arrow pointing to the 'Send' button and a red circle around the 'Workflow Actions' menu and the 'Recommend Approval' option.

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

Subcontractor/Supplier Declarations K12 - Bill's Concrete - Project No. OCI-150011.01 - Google Chrome

https://ohio-stage-unifier.oracleindustry.com/bp/process/task/open?task_id=149548&model=usdk1&project_id=1093&...

File Edit View Actions Help

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

General Subcontractor/Supplier Declarations K12

Validate the Federal Tax ID, EDGE status, and DFWP enrollment of the proposed subcontractor or material supplier

General

Project Number: OCI-150011.01 Record Number: SMSD-003

Project Name: Unit Test Building 1 Creation Date: 11/02/2015 12:08 PM (UTC-8)

Organization Name: Creator: Katie Tuttle

Facility Name: Status: Pending

Title: Bill's Concrete

Contract Name: Contract 1 Vendor Name: Bobs Construction Company

Declaration Information

Type: Material Supplier Tier 1: No

Subcontractor/Supplier Name: Bill's Concrete

Federal Tax ID: 30-22222

Primary Officer: Bill Bob

Contact Person: Bill Bob

Phone No.: 614-644-2211

Action Details

(Click here to view latest content)

To: []

Cc: []

Send For: []

Task Notes:

Workflow Actions: -Select-, Validated, Return for Clarification, Return for Subcontract, Reject

Attachments (2) Linked Records (0) General Comments Linked Mail (0)

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 Contract Modification (Amendment), the Subcontractor/Supplier Declaration must be created and in the **Completed** status.

Questions?

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