



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

# Purpose & Procedure

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

- ▶ Workflow

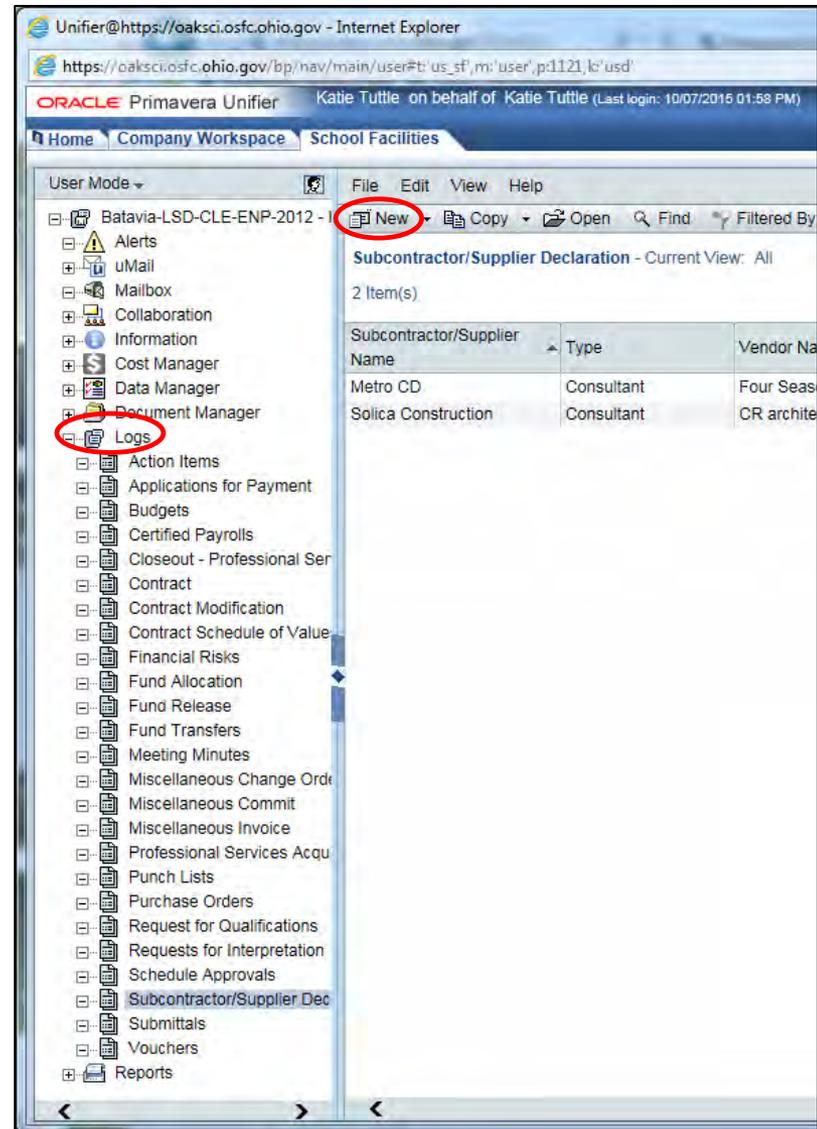
Created by: A/E → Submitted to: PM Declaration Review →  
Sent to: A/E Update (if necessary) → Sent to: PC Validation  
→ Sent to: Validation Update (if necessary)

# 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
  - ▶ Click New



Oracle Primavera Unifier - Katie Tuttle on behalf of Katie Tuttle (Last login: 10/07/2016 01:58 PM)

Home Company Workspace School Facilities

User Mode

File Edit View Help

New Copy Open Find Filtered By

Subcontractor/Supplier Declaration - Current View: All

2 Item(s)

Subcontractor/Supplier Name	Type	Vendor Name
Metro CD	Consultant	Four Seas
Solica Construction	Consultant	CR architect

# 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 URL [https://oaksci.osfc.ohio.gov/bp/process/new?wftemplate\\_id=3383&module\\_name=usd&csvimport=false&project\\_id=1121&attach=S{attach}&fromDm=&pr](https://oaksci.osfc.ohio.gov/bp/process/new?wftemplate_id=3383&module_name=usd&csvimport=false&project_id=1121&attach=S{attach}&fromDm=&pr). The page title is "Create New Subcontractor/Supplier Declaration - Project No. SFC-130336 - Internet Explorer". The form is titled "Subcontractor/Supplier Declarations K12" and has a "General" tab selected. The "General" tab contains the following fields:

Project Number:	OCI-140363	Record Number:	
Project Name:	Talawanda-CSD-BUT-CFAP-1-2013	Creator:	Katie Tuttle
Organization Name:	Talawanda CSD	Creation Date:	
Facility Name:		Status:	
Title:	Jeremy's Consulting *	Vendor Name:	SHP Leading Design
Contract Name:	Talawanda CSD - Kramer / Select... *		

The "Declaration Information" tab contains the following fields:

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.:	na
Address Line 2:		Email Address:	jsmith@email.com *
City:	Columbus *		
State:	Ohio *		
ZIP:	43215 *		

Annotations on the form include:

- A red circle around the "General" tab label.
- A red circle around the "Declaration Information" tab label.
- A red box around the "Title" field with the text "Use the Tier 1 dropdown box to indicate if this is a Tier 1 Sub" and an arrow pointing to the "Tier 1" dropdown.
- A red box around the "Tier 1" dropdown with the text "Use the Tier 1 dropdown box to indicate if this is a Tier 1 Sub" and an arrow pointing to the dropdown.
- A red box around the "Type" and "Tier 1" dropdowns with the text "Required fields have a red asterisk (\*)" and an arrow pointing to the asterisks.

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

# Form Completion

- ▶ Scroll down the form to complete the Additional Details block
- ▶ Attach any necessary documentation

Subcontractor/Supplier Name:  \*

Federal Tax ID:  \*

Primary Officer:  \*

Address Line 1:  \*

Address Line 2:  \*

City:  \*

State:  \*

ZIP:  \*

Subcontracted by:  \*

Contact Person:  \*

Phone No.:  \*

**Additional Details**

Subcontractor PO Date:  \*

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

Services/Material Brands:  \*

Skilled Trade License No.:  \*

DFSP Enrolled:  \*

EDGE Certified Sub?:  \*

EDGE Certification Number:  \*

MBE:  \*

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

https://oaksci.osfc.ohio.gov/bp/share/editGC?model=usd&task\_id=4207&id=0&process\_id=3

Close Window

Draft Comments

Text Comments    Attachments    Hidden Co

Add...    Modify...    Remove

**Action Details**

Submit

To...

Cc...

Send For: PM Declaration Review

Task Notes:

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

# Send the Declaration for Review

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

Workflow Actions: Submit

Send

Subcontractor/Supplier Declarations K12

General

Complete one record for each subcontractor and material supplier used.

Project Number: SFC-080001 Record Number:

Project Name: OAKS CI District Training Project 1 Creator: Katie Tuttle

Organization Name: OAKS CI District Training Project - 1 Creation Date:

Facility Name:  Status:

Title: Jeremy's Consulting \*

Contract Name: District Training Test Select... \* Vendor Name: Dynamix Engineering

Declaration Information

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.:

Address Line 2:  Email Address: jsmith@email.com \*

Action Details

Submit

To: Barbara Taylor, Katie Tuttle, Moenique Morris, R Task Due: 02/09/2016

Cc:

Send For: Declaration Review

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

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