



Subcontractor/Material Supplier Declaration-Contractor

K12 Legacy

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
 - ▶ Click New

Oracle Primavera Unifier interface showing the navigation menu and a table of Subcontractor/Supplier Declaration records.

Subcontractor/Supplier Name	Type	Vendor Name
A & A Safety	Subcontractor	Monarch C
Abel Enterprises, Inc.	Material Supplier	Monarch C
Action Specialties	Subcontractor	Monarch C
American Steel Fabricators L	Subcontractor	Monarch C
Approved Components	Material Supplier	Monarch C
Architects Sales, Inc.	Material Supplier	Monarch C
Architectural Products	Material Supplier	Monarch C
Beck Studios, Inc.	Subcontractor	Monarch C
Biosource Landscaping Serv	Subcontractor	Monarch C
Borgman Athletics Group, LL	Subcontractor	Monarch C
Buckeye Sealants	Subcontractor	Monarch C
C & T Design and Equipmen	Subcontractor	Monarch C
Columbus Graphics, Inc.	Subcontractor	Monarch C
Con-Quip Construction Supp	Material Supplier	Monarch C
CTL Engineering, Inc.	Subcontractor	Peterson C
CWS Contract	Subcontractor	Monarch C
DDickinson Construction Ser	Subcontractor	Monarch C
Delta Electrical	Subcontractor	Monarch C
Delta Electrical Contractors,	Subcontractor	Monarch C
Erlanger Hardware Consulta	Material Supplier	Monarch C
Ernst Concrete	Material Supplier	Monarch C
Evers Steel Construction	Subcontractor	Monarch C
Farnham Equipment Compa	Subcontractor	Monarch C
Federal Rent A Fence	Subcontractor	Monarch C

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={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" section contains the following fields: 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 - C), Record Number, Creator (Katie Tuttle), Creation Date, Status, and Vendor Name (Robertson Construction). The "Declaration Information" section contains: Type (Material Supplier), Subcontractor/Supplier Name (Bob's Concrete), Federal Tax ID (32-0000000), Primary Officer (Bob Brown), Address Line 1 (4200 Surface Rd.), City (Columbus), State (Ohio), ZIP (43215), Tier 1 (Yes), Subcontracted by, Contact Person (Brian Brown), Phone No. (614-555-5555), Fax No. (na), and Email Address (bob@email.com). Red circles highlight the "General" and "Declaration Information" tabs. Red boxes highlight the "Contract Name" dropdown, the "Tier 1" dropdown, and the "Required fields have a red asterisk (*)" text. Red arrows point from the "Tier 1" dropdown to the text "Use the Tier 1 dropdown box to indicate if this is a Tier 1 Sub" and from the "Required fields have a red asterisk (*)" text to the asterisks on the form fields. The "Action Details" section at the bottom has "Create New Subcontractor/Supplier Declarations K12" and "Send For:" fields. The footer contains "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

General

Complete one record for each subcontractor and material supplier used.

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 - C | Select... *

Record Number:

Creator: Katie Tuttle

Creation Date:

Status:

Vendor Name: Robertson Construction

Declaration Information

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:

City: Columbus *

State: Ohio *

ZIP: 43215 *

Tier 1: Yes *

Subcontracted by:

Contact Person: Brian Brown *

Phone No.: 614-555-5555 *

Fax No.: na *

Email Address: bob@email.com *

Action Details

Create New Subcontractor/Supplier Declarations K12

To:

Cc:

Send For:

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
- ▶ Attach any necessary documentation

Contract Name: Robertson Construction - C Select.. Vendor Name: Robertson Construction

Declaration Information

Type: Material Supplier Tier 1: Yes

Subcontractor/Supplier Name: Bob's Concrete Subcontracted by:

Federal Tax ID: 32-0000000

Primary Officer: Bob Brown

Address Line 1: 4200 Surface Rd.

Address Line 2:

City: Columbus

State: Ohio

ZIP: 43215

Additional Details

Subcontractor PO Date: 04/08/2016

Subcontractor/P.O. Amount \$: 50,000.00

Services/Material Brands: Concrete

Skilled Trade License No.: 85208520

DFSP Enrolled: Yes

EDGE Certified Sub?: Yes

EDGE Certification Number: 123456789

MBE: Yes

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

Send the Declaration for Review

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

The screenshot shows a web browser window titled "Create New Subcontractor/Supplier Declaration - Project No. SFC-130336 - Internet Explorer". The URL is https://oaksci.osfc.ohio.gov/bp/process/new?wftemplate_id=3383&module_name=usd&csvimport=false&project_id=1121&attach=s{attach}&fromUm=Csk. The browser's menu bar includes File, Edit, View, Actions, and Help. The "Workflow Actions" dropdown menu is open, showing "Submit" as the selected option. The main content area is titled "Subcontractor/Supplier Declaration" and contains a "General" section with the following fields:

- Organization: Department of Administrative Services
- Project Number: OCI-080001
- Project Name: Agency General Projects Test
- Project Location: OAKS CI Administration
- Title: Test 2 *
- Contract Name: C Test *
- Record Number: [Empty]
- Creation Date: [Empty]
- Creator: Katie Tuttle
- Status: [Empty]
- Vendor Name: OCI Test General

Below the "General" section is the "Declaration Information" section. At the bottom, the "Action Details" section is highlighted with a red box. It contains a "Submit" button, a "To..." field with the value "Katie Tuttle, Moenique Morris, Rita Nichols, Sara...", a "Cc..." field, and a "Send For" field with the value "Associate Declaration Review". A red arrow points from a text box to the "Submit" button. The text box contains the text: "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

Oracle Primavera Unifier interface showing a list of tasks. The 'Tasks' menu item in the left navigation pane is circled in red. A red arrow points to the 'SUB-0012 Submittal 1' entry in the task list table.

Type	Number	Title	Record Due	From
Subcontractor/Supplier Declaration	SSD-0006	Bob's Concrete		Sauna H
Action Items	AI-00014	test	02/27/2013	Sauna H
Change Order	CO-0008	shauna test 3/201		Sauna H
Professional Services Agreements	Agree-0008	test		Sauna H
Submittals	SUB-0012	Submittal 1		Sauna H
Action Items	AI-00013	asdf	02/27/2013	Rita Nich
Change Order	CO-0007	test		Sauna H
Action Items	AI-00012	test	12/07/2012	Sauna H
Contractor Pay Request	CPR-0004	Pay Request test		Sauna H
Action Items	AI-00011	CPR #1 Anderson	09/20/2012	Sauna H
Professional Services Agreements	Agree-0007	SAO Agency		Sauna H

Subcontractor/Supplier Declaration - Bob's Concrete - Project No. OCI-080001 - Google Chrome

Accept Task Decline Task Close Window

Subcontractor/Supplier Declaration

General

Organization: Department of Administrative Services Record Number: SSD-0008
Project Number: OCI-080001 Creation Date: 09/14/2015 10:48 AM (UTC-8)
Project Name: Agency General Projects Test Creator: Katie Tuttle
Project Location: OAKS CI Administration Status: Pending
Title: Bob's Concrete
Contract Name: Contractor Name: OCI Test General
Professional Services Agreement Name: test

Declaration Information

Type: Subcontractor
Subcontractor/Supplier: Bob's Concrete
Federal Tax ID: 31-0001
Primary Officer 1: Bob Brown
Address Line 1: 12345 Main St

Task Details

From: Katie Tuttle Task Due Date:
To: Project Administrators, Project Manager Task Status: Not Started
Cc: Sent For: PM Declaration Review

Task Notes (0)

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

Recommend Approval

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

The screenshot shows a web browser window titled "Subcontractor/Supplier Declaration - General - Project No. SFC-130336.01 - Internet Explorer". The address bar contains the URL: https://oaksci.osfc.ohio.gov/bp/studio/bp/log/open?srcid=2094&model=usd&fromcostlog=1&project_id=1137. A red arrow points to the "File" menu in the browser's menu bar. Another red circle highlights the "Workflow Actions" menu, which is open and shows the following options: "Recommend App...", "Reject", "Recommend Approval", and "Return for Clarification". The "Recommend Approval" option is highlighted in blue.

The main content area is titled "Subcontractor/Supplier Declaration" and is divided into several sections:

- General**
 - 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**
 - 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**
 - Recommend Approval ([Click here to view latest content](#))
 - To...: Barbara Taylor, Katie Tuttle, Kaylie Ruff, Moeniq
 - Cc...:
 - Send For: Declaration Review
 - Task Notes:

At the bottom of the page, there are links for "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

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

The screenshot displays a web browser window titled "Subcontractor/Supplier Declaration - General - Project No. SFC-130336.01 - Internet Explorer". The URL is https://oaksci.osfc.ohio.gov/bp/studio/bp/log/open?srcid=2094&model=usd&fromcostlog=1&project_id=1137. The page content includes a "General" section with fields for Project Number (OCI-150011.01), Project Name (Unit Test Building 1), Organization Name, Facility Name, Title (Bill's Concrete), Contract Name (Contract 1), Record Number (SMSD-003), Creation Date (11/02/2015 12:08 PM (UTC-8)), Creator (Katie Tuttle), Status (Pending), and Vendor Name (Bobs Construction Company). Below this is a "Declaration Information" section with fields for Type (Material Supplier), Subcontractor/Supplier Name (Bill's Concrete), Federal Tax ID (30-22222), Primary Officer (Bill Bob), Tier 1 (No), Subcontracted by, Contact Person (Bill Bob), and Phone No. (614-644-2211). At the bottom, there is an "Action Details" section with a link to view latest content and a "Task Notes" section. A red box highlights the "Workflow Actions" dropdown menu, which is currently open and shows the following options: Select, Validated, Return for Clarification, Return for Subcontract, and 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 Contract Modification (Amendment), the Subcontractor/Supplier Declaration must be created and in the **Completed** status.

Questions?

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