OAKS CI FAQs (K-12 Schools)
State of Ohio Standard Forms and Documents

Q. Who creates the Contract record in OAKS CI?

a. The contract record is created by the Project Coordinator then submitted to the Vendor for supporting documentation and signature.

Q. Who creates the Contract Schedule of Values (SOV) in OAKS CI?

a. The Owner Agent (OA), Commissioning Agent (CxA) and the Architect/Engineer (A/E) record is created by the OA, CxA and A/E, this includes the spreadsheet creation and import.

b. The Construction Manager (CM) or Design Builder (DB) Contractor SOV spreadsheet is completed by the CM/DB and Contractor who will then submit to the Project Coordinator. The Project Coordinator will review the EDGE information as well as update the Local Fund (LFI) column information. They will then import the spreadsheet into the SOV recording OAKS CI.

Q. How do I identify my EDGE provider in OAKS CI?

Create a Subcontractor/Supplier declaration in OAKS CI

Q. How do I identify my subcontractors in OAKS CI?

Create a Subcontractor/Supplier declaration in OAKS CI

Q. Change Orders:

a. When a vendor is adding a deduct line to a Change Order, they must reference the original line from the SOV, this is the **only** time they will **reference** a line.

b. When a change order changes the number of days for the Contract, the project coordinator must go back into the Contract SOV record in OAKS CI and update the Number of Days Changed for Change Order block.

Q. When submittals are received by the A/E, will the task be "accepted" and then reviewed and marked-up using tools within OAKS CI?

Upon acceptance of the task, the A/E will download and mark up the documents, upload to the document manager and re-attach to the submittal record (please view the Submittal Review (A/E) pre-recorded session) on the OFCC website at http://ofcc.ohio.gov/Resources/OAKSCI/K-12Training.aspx.

Q. Requests for Interpretation (RFIs):

a. **Will the Contractor initiate the RFI in the OAKS system?**

Yes

b. **When responding to an RFI within OAKS CI, can supporting documents (drawings, etc.) be uploaded through Document Manager and attached?**

Yes

Q. Punch Lists

a. **Who will generate the Punch List entries in OAKS CI?**

The CMR, DB or Contractor depending on the type of Contract

b. **When the Architect reviews a large section of the building, will they be able to upload the total Punch List, and then attach to an item in the Log? Or, does it need to be entered item by item? Or, is a different breakdown of the data preferred?**

You can upload your documents and attach to the punch list record in OAKS CI.

Q. Is there a job aid available to assist the school district in creating Vouchers and Purchase Orders?

Yes, located under the OAKS CI Training link on our OFCC website at
http://ofcc.ohio.gov/Resources/OAKSCI/K-12Training.aspx.

Q. The Training Video refers to "Project Manager" and "Project Coordinator". Does that refer to the OFCC representatives in those roles?

Yes

Q. Do any of the "Agency/Higher Ed" WebEx recordings apply to K-12 that it would be beneficial to watch those? Or, will it end up being more confusing?

Some of the trainings will be applicable, however the navigation to get into your project will be a little different, we recommend that you view the K-12 navigation session before reviewing the any agency WebEx.