

# Basic Project Process

## Step 1

- District/building project created by OAKS CI based on notification by OFCC Project Manager

## Step 2

- OAKS CI Team Members meet with PM and District staff(via phone call) to discuss OAKS CI roles
- Funding information is submitted by District Treasurer to oaksci@ofcc.ohio.gov
- Fund Release/Fund Allocation/Fund Transfer, recorded by OAKS CI

## Step 3

- Vendor Forms submitted to OAKS CI by OFCC PM OR PC
- Vendors Created in system by OAKS CI

## Step 4

- Project User Access Forms submitted to OAKS CI by Project Manager

## Step 5

- Contract initiated by Project Coordinator for GC,CMR or DB,
- Initiation by OA,AE,CX for other contracts

## Step 6

- Upon receipt of Contract and/or Contract Modification in OAKS CI
- District inputs Board resolution information into Contract record
- Prints and signs contract
- District Creates Purchase Order Financial System of Record
- **District Records Purchase Order** in OAKS CI
- Attach PO to Contract

## Step 7

- Subcontractor Supplier Declaration created by GC, CM-R, DB or other applicable vendor

LFI MOU record  
Created in OAKS CI  
by PM at various  
stages in Project  
District Prints, Signs,  
and attaches signed  
copy to record

## Step 8

- Contract SOV created on **spreadsheet** by vendor submitted to PC for input into OAKS CI
- Verify **Edge** supplier is identified on SOV
- LFI **must** also be identified on spreadsheet

## STEP 9

- Application for Payment created by GC,CMR,DB,AE,O A,CX and submitted
- PM will review and approve

- Upon receipt of Application for Payment in OAKS CI
- District creates voucher in Financial system of record
- **District Records Voucher** in OAKS CI
- Attach Voucher to approved Application for Payment

## Step 10