



Subcontractor/Material Supplier Declaration

A/E

Purpose & Procedure

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

- ▶ Workflow:

Created by: A/E → Submitted to: **PM Review** → **Sent to: A/E Update (if necessary)**
→ Sent to: **PC Declaration Validation** → **Sent to: A/E 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
 - ▶ Attach to the Record
 - ▶ 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
 - ▶ Select Workflow (if applicable)

The screenshot shows the Oracle Primavera Unifier web interface. The browser address bar displays the URL: <https://ohio-dev-unifier.oracleindustry.com>. The page title is "ORACLE PRIMAVERA UNIFIER" with a last login time of "02/04/2018 08:28 AM". The user is logged in as "Unifier@https://ohio-dev-unifier.oracleindustry.com". The main navigation pane on the left shows a tree view of the system. The "Logs" folder is expanded, and the "Subcontractor/Supplier Declaration" record is highlighted. A red arrow points from the text "Select Workflow (if applicable)" to this record. The "New" button in the top right corner of the interface is also circled in red.

Company Workspace OAKS CI District T... +

Navigate To...

File Edit View Help

New Copy Open Find

Subcontractor/Supplier Declarations K12 - Cu

0 Item(s)

Subcontractor/Supplier	Type
------------------------	------

Logs

- Action Items K12
- Applications for Payment K12
- Closeout - Professional Service
- Contract K12
- Contract Modification K12
- Contract Schedule of Values K1
- Field Reports K12
- Fund Release K12
- Fund Transfers K12
- Meeting Minutes K12
- Miscellaneous Change Order K
- Miscellaneous Commit K12
- Miscellaneous Invoice K12
- PS Acquisition K12
- Potential Costs K12
- Purchase Orders K12
- Request for Qualifications K12
- Subcontractor/Supplier Declar**
- Vouchers K12

Reports

Form Completion

- ▶ Complete General Block
- ▶ The Title should house the name of the company utilized

Create New Subcontractor/Supplier Declarations K12 - Project No. SFC-080001 - Google Chrome

https://ohio-train-unifier.oracleindustry.com/bp/process/new?wftemplate_id=2956&module_name=usdk1&csvimport=fa

File Edit View Actions Help Workflow Actions -Select-

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

General 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... *

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 *

City: Columbus * State: Ohio * ZIP: 43215 *

Additional Details

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

Required fields have a red asterisk (*)

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
- ▶ Once comments are added to the record, you'll see an icon of people's heads next to the General Comments link
- ▶ General Comments become a permanent part of the record

Subcontractor/P.O. Amount \$: 0.00 MBE:

Action Details

Create New Subcontractor/Supplier Declaration

To...

Cc...

Send For:

Task Notes:

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

General Comments - Google Chrome

<https://ohio-unifier.oracleindustry.com/bp/share/editGC?model=usd&t>

Close Window

Draft Comments

Text Comments Attachments Hidden Co

Add... Modify... Remove

Action Details

Submit

To... Barbara Taylor,Katie Tuttle,Moenique Morris,C

Cc...

Send For: PM Declaration Review

Task Notes:

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

Send the Declaration for Review

- ▶ Add any attachments as necessary
- ▶ Select Submit in Workflow Actions
- ▶ Click Send to send the declaration for review

The screenshot displays the Oracle Industry Application interface for creating new subcontractor or supplier declarations. The browser window title is "Create New Subcontractor/Supplier Declarations K12 - Project No. SFC-080001 - Google Chrome". The URL is https://ohio-train-unifier.oracleindustry.com/bp/process/new?wftemplate_id=2956&module_name=usdk1&csvimport=fa. The application menu includes File, Edit, View, Actions, and Help. The toolbar contains buttons for Send, Save, Spelling, Undo, Accept Task, Add Attachment, Discussion, and Close Window. The Workflow Actions dropdown is set to Submit. The form is titled "Subcontractor/Supplier Declarations K12" and is divided into several sections:

- General:** Complete one record for each subcontractor and material supplier used. Fields include Project Number (SFC-080001), Project Name (OAKS CI District Training Project 1), Organization Name (OAKS CI District Training Project - 1), Facility Name, Title (Jeremy's Consulting), Contract Name (District Training Test), Record Number, Creator (Katie Tuttle), Creation Date, Status, and Vendor Name (Dynamix Engineering).
- Declaration Information:** Fields include 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., and Address Line 2. Email Address is jsmith@email.com.
- Action Details:** The Submit button is highlighted. The To field is populated with "Barbara Taylor, Katie Tuttle, Moenique Morris, R...". The Send For field is set to "Declaration Review". The Task Due date is 02/09/2016.

At the bottom of the form, there are links for Attachments (0), Linked Records (0), General Comments, and 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:

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