



Contractor Pay Request

Create Request for Retainage Release



Request Retainage Release (Contractor)

- ▶ Once the Contract has been billed out at 100%, you may now request Retainage Release.
- ▶ This will be a \$0.00 payment request and will trigger the release of Retainage.



Request Retainage Release (Contractor)

- Log into OAKS CI
 - a. Click + sign
 - b. Type project name or number in search bar
 - c. Click appropriate project to open

The screenshot shows a web browser window with the URL <https://ohio-unifier.oracleindust...> and the page title "Service Requests". The search bar contains the text "DPS". A dropdown menu is open, displaying a list of projects. The table below shows the data from the dropdown menu.

Name	Number	Location
Ohio State Highway Patrol Post 44	DPS:080001	/Agency/Department of Public Safety
OSHP Post 23 LEADS Building	DPS:110001	/Agency/Department of Public Safety
ODPS ACF Standing Seam Roof Renovation	DPS:110003	/Agency/Department of Public Safety
LEADS Data Center Alum Creek Facility	DPS:110006	/Agency/Department of Public Safety
OSHP Academy Range Equip. Replacement	DPS:110009	/Agency/Department of Public Safety
ODPS - EOC Reorganization	DPS:110010	/Agency/Department of Public Safety
OSHP Academy Maintenance & Repair Project	DPS:120001	/Agency/Department of Public Safety
OSHP Alum Creek Crime Lab Addition	DPS:120002	/Agency/Department of Public Safety
Academy HVAC Replacement-Chiller & Range ...	DPS:120004.02	/Agency/Department of Public Safety
Alum Creek HVAC	DPS:130001	/Agency/Department of Public Safety

Request Retainage Release (Contractor)

- ▶ In OAKS CI navigate to:
 - ▶ Logs -> **Contractor Pay Request**
 - ▶ Click **Create**

The screenshot displays the Oracle Primavera Unifier (Development) interface. The top navigation bar shows 'Agency' and 'OAKS CI Trainin...'. The left sidebar contains a list of menu items, with 'Logs' circled in red. A red arrow points from the 'Logs' menu item to the 'Contractor Pay Request' item in the sidebar. The main content area shows the 'Contractor Pay Request' page with a '+ Create' button circled in red. Below the button is a table with columns 'Title' and 'Con'.

Title	Con
Stored Materials Test	Wed
Winnie PR1	Mon
Katie PR1	SSS
AGO-150001.02_PR001	Wed
Morris_PR 0001	Mon
Student 7	Stuf
Student 6	Sch
Morrison Building PR4 ...	Mon
Morrison Building PR3	Mon
Morrison Building PR2	Mon
Morrison Building PR1	Mon
Harrison PR3 Final	Mon
Harrison PR2	Mon
Harrison PR1	Mon
Student 5	Wed
Student 4	NEC

Total: 37



Request Retainage Release (Contractor)

- Enter all required * fields under the **General** tab, scrolling down as necessary
- Enter Title
- Choose Contract Reference
- Enter Request Date
- Final Payment: **Yes**
- Retainage Release Requested: **Yes**
- Enter Period From, Period To Date

Create New Contractor Pay Request - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/ucpr/1006/376?__uref=uuu949010050t2

Create New Contractor Pay Request Send Save

General Pay Request Details Added Purchase Orders

General

Organization Department of Administrative Services	Record Number
Project Name OAKS CI Training 1	Creator Matthew Weber
Project Number OCI-080001	Creation Date
Project Location Surface Road	Status

Title * OCI-100056-01-02 Retainage	Request Date * 08/12/2020 05:00 PM (UTC-8)
Contract Reference * Fred 20091009 OAKS Plumbing	Contractor Name Sands Decker Ltd.
Final Payment? * Yes	EDGE Certified Prime? No
Retainage Release Requested? Yes	
Period From * 02/21/2020 05:00 PM (UTC-8)	Period To * 02/29/2020 05:00 PM (UTC-8)
Internal Ref. Number	A/E Approval Date

Attachments Con >

Information
No Attachments.

Request Retainage Release (Contractor)

- Scroll down to the **Prevailing Wage** section
- Click **Select** next to Prevailing Wage Report
- Choose most recent **Prevailing Wage Report**

The screenshot shows the 'Create New Contractor Pay Request' form in Google Chrome. The 'Prevailing Wage' section is active, and a modal window titled 'Prevailing Wage Report' is open. The modal contains a table with the following data:

Contract SOV Name	Contractor Name	Pay Request Period Start	Pay Request Period End	Status	Record
Fred 20091009 OAK...	Sands Decker Ltd.	02/21/2020 05...	02/29/2020 05...	Complete	PWR-
Hooks Test1	Sands Decker Ltd.	02/01/2020 05...	02/29/2020 05...	Complete	PWR-
Hooks Test1	Sands Decker Ltd.	05/01/2013 10...	05/31/2013 10...	Complete	PWR-
Hooks Test1	Sands Decker Ltd.	02/18/2013 09...	03/29/2013 10...	Complete	PWR-
Fred 20091008 OAK...	OAKS Plumbing	02/15/2013 09...	03/15/2013 10...	Complete	PWR-
Fred 20091008 OAK...	OAKS Plumbing	02/01/2013 09...	02/28/2013 09...	Complete	PWR-
Fred 20091008 OAK...	OAKS Plumbing	02/15/2013 09...	02/28/2013 09...	Complete	PWR-
Hooks Test1	Sands Decker Ltd.	02/15/2013 09...	02/28/2013 09...	Complete	PWR-
Fred 20091008 OAK...	OAKS Plumbing	01/01/2014 09...	01/31/2013 09...	Complete	PWR-
Hooks Test1	Sands Decker Ltd.	01/01/2013 09...	01/31/2013 09...	Complete	PWR-
Fred 20091008 OAK...	OAKS Plumbing	11/01/2011 11...	11/30/2011 09...	Complete	PWR-
Fred 20091008 OAK...	OAKS Plumbing	11/01/2011 11...	11/30/2011 09...	Complete	PWR-

The modal also shows a 'Total: 192' at the bottom left and 'Cancel' and 'Select' buttons at the bottom right. A red arrow points to the 'Select' button.

Request Retainage Release (Contractor)

- ▶ Ensure the Prevailing Wage Start and End Date match the Pay Request

Create New Contractor Pay Request - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/ucpr/1006/376?_uref=uuu949010050t2

Create New Contractor Pay Request

Send Save

General Pay Request Details Added Purchase Orders

Title *
OCI-100056-01-02 Retainage

Request Date *
08/12/2020 05:00 PM (UTC-8)

Contract Reference *
Fred 20091009 OAKS Plu...

Contractor Name
Sands Decker Ltd.

Final Payment? *
Yes

EDGE Certified Prime?
No

Retainage Release Requested?
Yes

Period From *
02/21/2020 05:00 PM (UTC-8)

Period To *
02/29/2020 05:00 PM (UTC-8)

Internal Ref. Number

A/E Approval Date

Prevailing Wage
Prevailing Wage Report
Sands Decker Ltd.

Pay Request Period Start
02/21/2020 05:00 PM (UTC-8)

Pay Request Period End
02/29/2020 05:00 PM (UTC-8)

Attachment >

Information
No Attachments.

Request Retainage Release (Contractor)

- Previous Pay Request block:
 - Initial Pay Request
 - Select: **No**
 - Previous Pay Request
 - Choose the most recent Pay Request

Create New Contractor Pay Request - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/ucpr/1006/376?_uref=uuu949010050t2

Create New Contractor Pay Request

Send Save

General Pay Request Details Added Purchase Orders

Previous Pay Request
Select your most recent, approved pay request.
For first pay request leave blank.

Initial Pay Request? *
No

Previous Pay Request *
Fred 20091008

Previous PR Vendor
OAKS Plumbing

Period From
09/01/2009 10:00 AM (UTC-8)

Period To
09/30/2009 10:00 AM (UTC-8)

▶ Stored Materials Summary

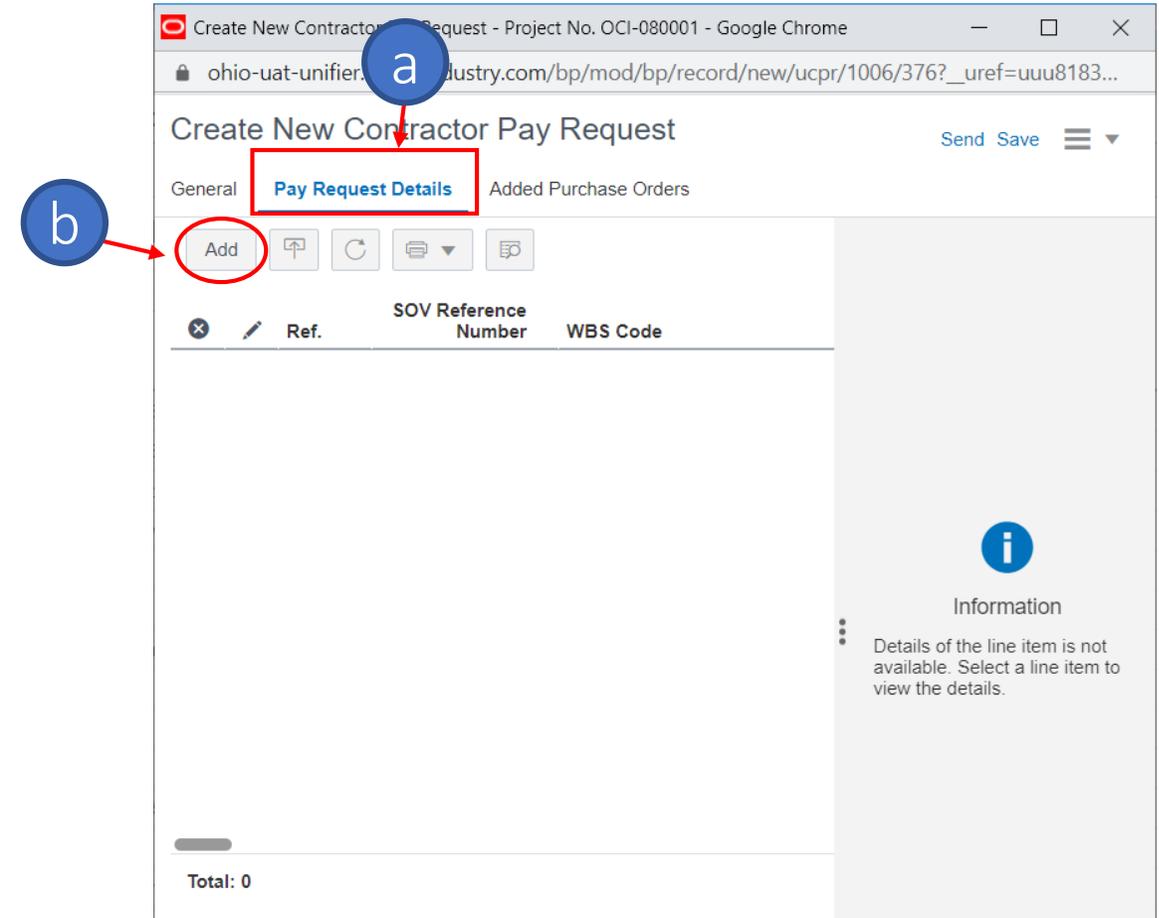
▶ Earned Current Request

Attachment

Information

Add Line Items (Contractor)

- a) Click on the **Pay Request Detail** tab
- b) Click **Add**



Add Line Items (Contractor)

- ▶ Select any Line Item, all Line Items should be already billed at 100%

c) Provide **Short Description**

d) Leave Percent Complete at 100%

e) Click **Save** once complete

Create New Contractor Pay Request - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/ucpr/1006/376?_uref=uuu949010050t2

Create New Contractor Pay Request

General Pay Request Details Added Purch

Cancel Error Check Save

Ref.	SOV Ref...	WBS Code	Code Name	Commit Short Description	Short Description*	Scheduled Value	% Labor Complete	% Materials Complete	% Services Complete
001	1	CE-FC-03L	Concrete Labr	labor - concrete	[Required]	70,000.00	100.00	0.00	0.00
002	2	CE-FC-03M	Concrete Matl	material - concrete	Concrete Material	100,000.00	0.00	100.00	0.00
003	3	CE-FC-03L	Concrete Labr	concrete labor 2	Concrete Labor	70,000.00	100.00	0.00	0.00
004	4	CE-FC-03L	Concrete Labr	concrete labor 3	Concrete Labor	70,000.00	100.00	0.00	0.00
005	5	CE-01-IN	CE Insurance	insurance	Insurance	40,000.00	0.00	0.00	100.00
TOTAL						350,000.00	300.00	100.00	100.00

Total: 5

Send Pay Request (Contractor)

- ▶ Click **Send**
- ▶ Verify the Workflow Action to Submit the record for **Associate Review**
- ▶ Click **Send**

Create New Contractor Pay Request - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/ucpr/1006/376?_uref=uuu818388450t2

Create New Contractor Pay Request

General Pay Request Details Added Purchase Orders

Send Save

Earned Current Request

Current Services	20,000.00	Current Material	25,000.00
Current Labor	52,500.00	Stored Materials	0.00
Current DPE/Reimb	0.00		
Current Labor Total	72,500.00	Current Materials Total	25,000.00
		Current Earned	97,500.00

Completed to Date

Services	20,000.00
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Attachments

Information

Create New Contractor Pay Request - Project No. OCI-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/ucpr/1006/376?_uref=uuu818388450t2

Create New Contractor Pay Request

Workflow Action Details

General Pay Request Details Added Purchase Orders

Action Details

Workflow Actions: Submit

Send For: Associate Review

To: Archana Atrey, Cindy Pizzuto, Consultant Student1, Consultant Student10, Consultant Student11, C...

CC: Start typing for suggestions...

Due Date Details

Task Due Date: Task Due Date is not available

Cancel **Send**

Information