
To: [Consultant]
Cc: [Project Manager]
Subject: [Project Number], Vendor Paperwork needed

Dear Consultant-

Attach these documents:

- 1) OAKS CI access form
- 2) Exhibit A
- 3) Consultant List Requirement form

First, Please fill out the OAKSC CI Access form for the Consultant List project; each person must **complete a form** and send it back to your **[agency coordinator/ project manager]**. No need to change permissions; it must remain as "Architect." The project team will review and send to OAKS CI.

Once you receive OAKS CI access, you can start uploading the below documents.

To help streamline the required documents needed for your Consultant List Agreement, please upload in: **Project Number; > Document Manager > Documents > Acquisition, Associate folder (Architect)**: the following items:

- a. Filled in Consultant List Agreement Requirements (attached as PDF document)
- b. Your company's EDGE Participation letter, if applicable (does not apply to all consultants)
- c. Your Firm's license to practice in State of OH (No need for individual licenses)
- d. Your BWC Letter
- e. Firm's Certificate of Insurance

*Each project will require a Certificate of Insurance, listing the State of Ohio as the holder, from your firm's insurance carrier per 7.2 Consultant List Standard Terms and Conditions.

***Please make sure you have your insurance company reference the actual project number (AGY-FYNNNN) on the Description or Reference section on the insurance declaration page(s).**

For the Certificate Holder, please do the following:

[Agency/Higher Education]
[Address]

Thanks,

[Agency Coordinator/ Project Manager]