



# Locally Funded Initiative MOU

## K-12 Cloud



# Purpose & Procedure

- ▶ The Project Manager or Owner's Agent is responsible for the LFI MOU and for ensuring the LFI is correctly reflected on Contract SOV records.

- ▶ Workflow

Created by: PM, PC or OA → Sent to: District Treasurer for Funding Plan → Sent to: PC for DocuSign



# Create LFI MOU

- ▶ In OAKS CI navigate to:
  - ▶ Logs -> LFI MOU K12
  - ▶ Click Create
  - ▶ Select Workflow

The screenshot shows the Primavera Unifier web application. The browser address bar displays the URL: <https://ohio-dev-unifier.oracleindustry.com/bp/roi>. The page title is "PRIMAVERA Unifier (Development)". The user is logged in as "Katie Tuttle" and can click "Sign Out".

The navigation menu on the left includes the following items:

- Logs (highlighted with a red circle)
- Action Items K12
- Advertisements K12
- Applications for Payment K12
- Certified Payrolls K12
- Closeout - Contractor K12
- Contract K12
- Contract Modification K12
- Contract Schedule of Values K12
- Design Reviews K12
- Escrow Accounts K12
- Field Reports K12
- Fund Release K12
- Fund Transfers K12
- Liens K12
- Locally Funded Initiative MOU** (highlighted with a red bar and a red arrow pointing to it)
- Meeting Minutes K12
- Miscellaneous Change Order ...
- Miscellaneous Commit K12

The main content area displays the "Locally Funded Initiative MOU" page. The "Create" button is highlighted with a red box, and a dropdown menu is open, showing the following options:

- LFI MOU V3 DocuSign
- Zero LFI

Below the dropdown, there is a table with the following columns: Stage, % Project Co..., % Local Initia..., Total LFI Estimate, and St. The table contains one row:

Stage	% Project Co...	% Local Initia...	Total LFI Estimate	St.
Design Develo...	50	50	0.00	Pe

The page footer shows the URL: [https://ohio-dev-unifier.oracleindustry.com/bp/mod/bp/log?model=ulfim&uu...atapickerDe=&configBpLogType=&\\_uref=uuu146:navigator-2&admin\\_updates=#](https://ohio-dev-unifier.oracleindustry.com/bp/mod/bp/log?model=ulfim&uu...atapickerDe=&configBpLogType=&_uref=uuu146:navigator-2&admin_updates=#)



# LFI MOU

- ▶ Complete all open fields
  - ▶ Fields marked with a red \* are mandatory
- ▶ Enter **Title** and select **Stage** from drop down
- ▶ Scroll down the record to continue entering information

Create New Locally Funded Initiative MOU - Project No. SFC-080001.01 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/ulfim/1086/3658?\_\_uref=uuu88224743t5

## Create New Locally Funded Initiative MOU

Send Save

### LFI MOU

LFI MOUs are now processed in DocuSign. Use the LFI MOU Breakdown Spreadsheet or other aids to calculate the amounts. Complete the data fields. Take the workflow action submit to forward this record to the District Treasurer to obtain the funding information.

**General**

Project Number SFC-080001.01	Record Number
Project Name Oak Hills Local Building Project	Creator Matthew Weber
Organization Name	Creation Date
Facility Name	Status
County	

**Title \*** LFI MOU #3      **Stage \*** Design Development

▶ OSFC Scope of Work

**Attachments** Comments

Information  
No Attachments.



# LFI MOU

- ▶ Enter required information and fill out appropriate fields
- ▶ Continue scrolling down to finish entering information into the record

Create New Locally Funded Initiative MOU - Project No. SFC-080001.01 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/ulfim/1086/3658?\_uref=uuu88224743t5

### Create New Locally Funded Initiative MOU

Send Save

#### LFI MOU

##### OSFC Scope of Work

Include values from LFI Worksheet Lines A, M, S, and T

OFCC Scope of Work \*

OFCC SoW including LFI Worksheet Lines A, M, S, and T

##### LFI Short Description

Description of Initiative

Local Initiative Scope of Work \*

Description of LFI SoW...

##### Local Initiative Budget

Include values from LFI Worksheet Lines F, N, Y and Z

Construction Costs (\$)	5,000.00
Contingency (\$)	4,000.00
Non-Construction Costs (\$)	2,000.00
Total LFI Estimate (\$)	11000.00

##### Additional SqFt or Renovation Project Improvement

Attachments Comments

Information No Attachments.



# LFI MOU

- ▶ **% Project Construction Fund and % Local Initiative Fund are Required and must equal 100 total**

Create New Locally Funded Initiative MOU - Project No. SFC-080001.01 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/ulfim/1086/3658?\_\_uref=uuu88224743t5

### Create New Locally Funded Initiative MOU

Send Save

#### LFI MOU

**Proportional Sharing Percentages**  
Check these values! The sum of all construction contracts times the LFI % should equal the Construction Cost LFI Budget shown above.

% Project Construction Fund *	68	% Local Initiative Fund *	32
LFI Fund(s) and Cost Center(s)		Proportion Check (Must = 100)	100

Document Publishing

Attachments Comments

Information  
No Attachments.



# LFI MOU

- ▶ When the record is ready to move forward, click the **Send** button
- ▶ Verify Work Action: **Submit**
- ▶ Click **Send**

The image shows two overlapping screenshots of a web application interface for creating a Locally Funded Initiative (LFI) Memorandum of Understanding (MOU).

The top screenshot shows the main form titled "Create New Locally Funded Initiative MOU". A red circle highlights the "Send" button in the top right corner, with a red arrow pointing to it. The form includes sections for "Proportional Sharing Percentages" and "Document Publishing".

The bottom screenshot shows a "Workflow Action Details" dialog box. A red box highlights the "Submit" option in the "Workflow Actions" dropdown menu. Below this, the "To" field lists several email addresses, and the "CC" field is empty. The "Due Date Details" section shows "Task Due Date" is not available. A red arrow points to the "Send" button at the bottom right of the dialog.

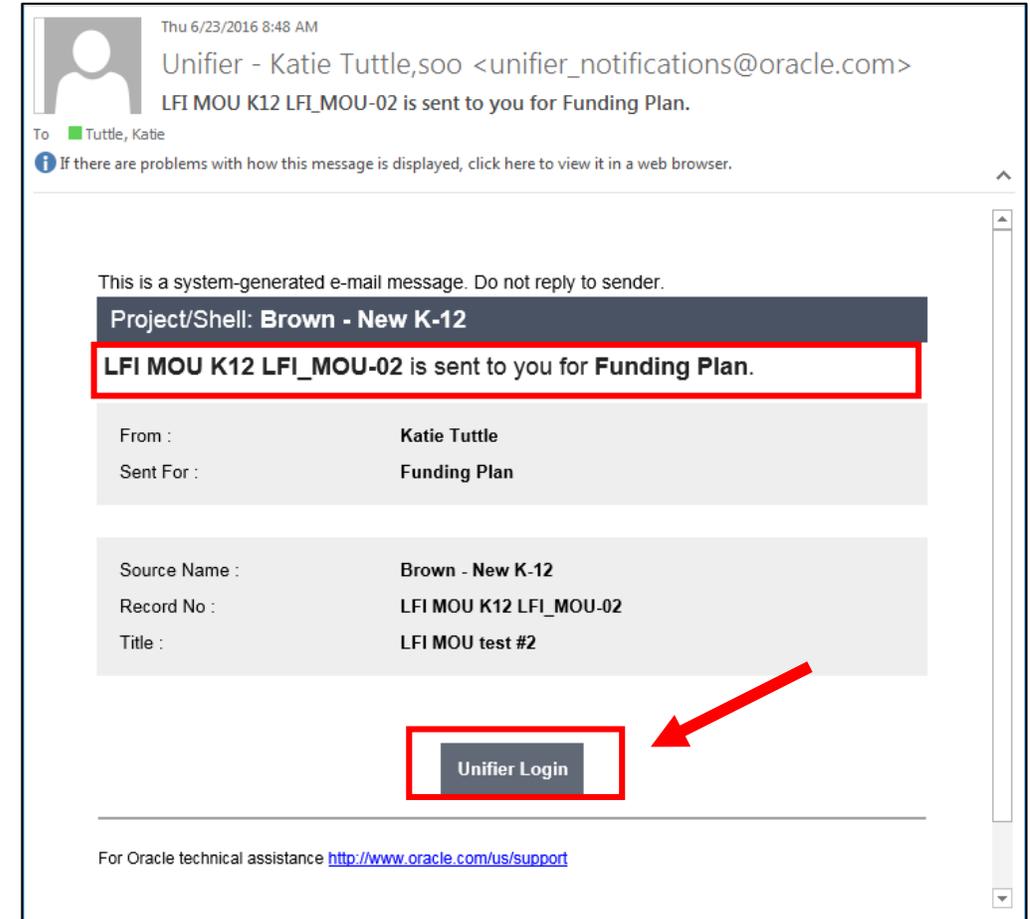


# Funding Plan Step - District Treasurer



# Receive an Email

- ▶ Click the “Unifier Login” button to access your Task



# Task Action

- ▶ Click **Accept** to begin work on your Task

The screenshot shows a web browser window with the title 'Locally Funded Initiative MOU - Project No. SFC-080001.01 - Google Chrome'. The URL is 'ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/217714?task\_id=217714&parent\_id=0&viewOnly=0&project\_id=1086&model=ulfim&...'. The page title is 'Locally Funded Initiative MOU'. In the top right corner, there are two buttons: 'Accept' (circled in red) and 'Decline', followed by a menu icon. Below the title is a sub-section 'LFI MOU'. The main content area is divided into two columns. The left column has two sections: 'Task Details' and 'General'. 'Task Details' includes fields for 'From' (Matthew Weber), 'To' (Archana Atrey, Jordan Zamary, Lance Witcher, Matthew Weber, Purna Irukulapati, Rita Nichols, ...), and 'Sent For' (Funding Plan). 'General' includes fields for 'Project Number' (SFC-080001.01), 'Record Number' (LFI-04), 'Project Name' (Oak Hills Local Building Project), 'Creator' (Matthew Weber), 'Organization Name', 'Creation Date' (10/12/2020 08:13 PM (UTC-8)), 'Facility Name', 'Status' (Pending), and 'County'. The right column has a tabbed interface with 'Attachments' selected. Below the tabs is a large grey area with an information icon and the text 'Information No Attachments.'



# Complete Information

- ▶ Attach any supporting documentation in the Attachments tab on the right side of the record
- ▶ When the record is ready to move forward, click **Send**

Locally Funded Initiative MOU - Project No. SFC-080001.01 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opentask/217714/undefined/undefined?\_\_uref=uuu88224...

## Locally Funded Initiative MOU

**Send** Save

### LFI MOU

NEW INSTRUCTIONS! LFI MOUs are now signed electronically in DocuSign. Treasurer, please enter the funding source information in the Funding Plan block below. If the project has reached the Construction Documents stage you must use the ADD Attachments button to attach a FINDAT report documenting the LFI MOU Funds reserved. Finally take the Submit Funding Planworkflow action to send this record to the project coordinator.

#### General

Project Number	SFC-080001.01	Record Number	LFI-04
Project Name	Oak Hills Local Building Project	Creator	Matthew Weber
Organization Name		Creation Date	10/12/2020 08:13 PM (UTC-8)
Facility Name		Status	Pending
County			
Title	LFI MOU #3	Stage	Design Development

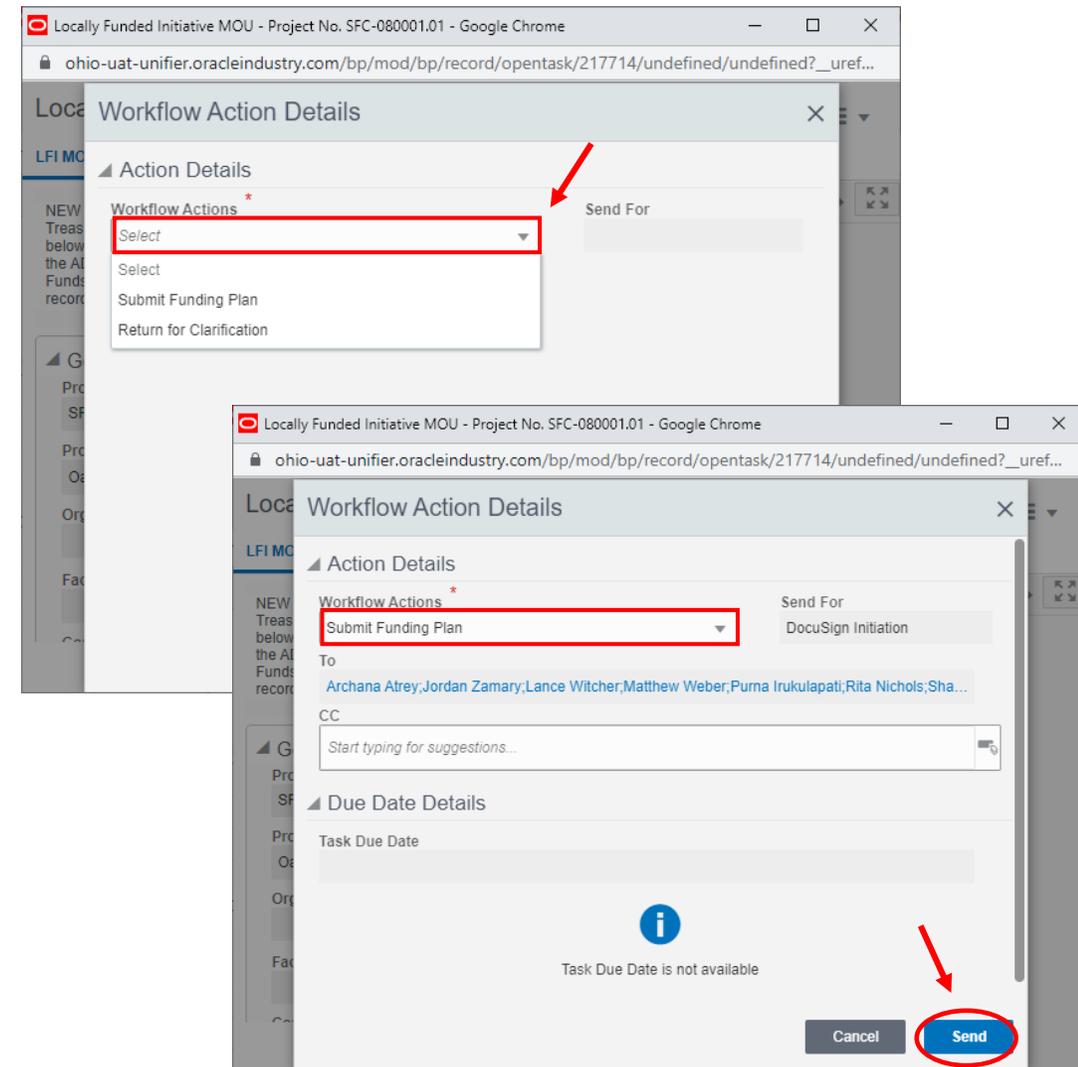
#### Attachments

Information  
No Attachments.



# Complete Information

- ▶ Select Workflow Action:
  - ▶ **Submit Funding Plan** will move the record forward to **DocuSign Initiation**
  - ▶ Return for Clarification will return the record to the **Update step**
- ▶ Click **Send**



# Next Step

- ▶ The OFCC Project Coordinator will now create the DocuSign document and circulate the document for signature



# Questions?

Please contact OAKS CI Support Desk:

[oaksci@ofcc.ohio.gov](mailto:oaksci@ofcc.ohio.gov)

614.644.2211

