



# Application for Payment

## A/E K12



# Application for Payment – Create (A/E, CxA, OA)



# Application for Payment Creation

- 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.oracleindustri...> and the page title "Service Requests". The browser's address bar contains the ID "uuu600419530". The page header includes several tabs: "Company Work...", "ACF Fire Protec...", "OSHP Academy...", "Company Work...", "IRJCF PREA R...", "Salt Fork State ...", and "Agency General...". A red box highlights a "+" sign in the top right corner of the header, labeled with a blue circle "a". Below the header, a search bar contains the text "DPS:". A red arrow labeled with a blue circle "b" points to the search bar. Below the search bar, a table of projects is displayed. A red arrow labeled with a blue circle "c" points to the first row of the table. The table has three columns: "Name", "Number", and "Location".

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



# Application for Payment Creation

- ▶ In OAKS CI navigate to:
  - ▶ District Level Project
  - ▶ Logs -> Application for Payment K-12
  - ▶ Click Create

The screenshot shows the Oracle Primavera Unifier (Development) interface. The top navigation bar includes the Oracle logo and the text 'PRIMAVERA Unifier (Development)'. Below this, there are tabs for 'School Facilities' and 'OAKS CI Distric...'. A left-hand navigation menu is visible, listing various options such as 'OAKS CI District Training Project ...', 'XAM Patients', 'Alerts', 'Tasks', 'Notifications', 'Drafts', 'uMail', 'Mailbox', 'Information', 'Cost Manager', 'Data Manager', 'Document Manager', 'Logs', 'Action Items K12', 'Applications for Payment K12', 'Closeout - Professional Servic...', 'Contract K12', 'Contract Modification K12', 'Contract Schedule of Values K12', 'Field Reports K12', 'Fund Release K12', and 'Fund Transfers K12'. The 'Logs' option is circled in red, and a red arrow points to the 'Applications for Payment K12' option. The main content area displays a table titled 'Applications for Payment K1' with columns for 'Title' and 'Cont'. The table contains several rows of data, including 'ggg', 'Architect Pay Request', 'Test', '03 District Training PR 02', '03 District Training PR 01', and 'SFC-080001-02-01 PR 1'. A '+ Create' button is circled in red in the top right corner of the table area. The bottom right corner of the table area shows 'Total: 7'.

	Title	Cont
	ggg	SFC-
	Architect Pay Request	SFC-
	Test	SFC-
	Test	SFC-
	03 District Training PR 02	03 Di
	03 District Training PR 01	03 Di
	SFC-080001-02-01 PR 1	SFC-



# Complete General Block

▶ Enter the required \* fields

- a) Enter the **Title**
- b) Click the Select button for **Contract Reference**
- c) Choose Contract
- d) Click **Select**

Create New Applications for Payment K12 - Project No. SFC-080001.01 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uafpk/1086/3017?\_uref=uuu759905007t4

### Create New Applications for Payment K12

General Pay Request Details

Complete the General, Certified Payroll, and Previous Pay Request blocks; then click Add.

**General**

Project Name  
Oak Hills Local Building Project

Project Number  
SFC-080001.01

Organization Name

Facility Name

Title \*  
Test Application for Payment

Contract Reference \*  
Jill's Contracting

Final Payment? \*  
No

Retainage Release Requested?  
No

Period From \*  
08/01/2020

Internal Ref. Number

**Record Number**

Creator  
Matthew W

Creation Date

Status

Request Date

Contractor Name  
Joe General Contractor

EDGE Certification  
Yes

Contract Type  
CM at Risk

Period To \*  
08/31/2020

A/E Approval Date

PM Approval Date

Received Date

### Contract Schedule of Values K12

Search | Find on Page

Title	Contractor Name	Contract No.	Completion	Status	Creation Date	Record No.
K-12 Archana test SOV	Joe General Contractor	71220-1		Approved	08/11/2020 11...	SOV-009
71220-1- test	Joe General Contractor	71220-1		Approved	07/13/2020 12...	SOV-008
Test Pre-con SOV	Joe General Contractor	072215		Approved	04/14/2017 07...	SOV-006
Jill's Contracting	Joe General Contractor	072215		Approved	10/13/2016 08...	SOV-005
Joe Contractor SOV	Joe General Contractor	072215		Approved	10/13/2016 07...	SOV-004
Katie's Contracting	Joe General Contractor	072215		Approved	10/07/2016 12...	SOV-003
Test 2 SOV	Joe General Contractor	072215		Approved	02/24/2016 10...	SOV-002
Test SOV	Joe General Contractor	072215		Approved	12/03/2015 08...	SOV-001

Total: 8

Cancel Select



# Complete General Block

- ▶ Enter the required \* fields
  - d) Enter **Period From** and **Period To**
- ▶ Scroll to down to the next section

d

Create New Applications for Payment K12 - Project No. SFC-080001.01 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uafpk/1086/3017?\_uref=uuu759905007t4

### Create New Applications for Payment K12

General Pay Request Details

Complete the General, Certified Payroll, and Previous Pay Request blocks; then complete the Pay Request Details on the lower form by clicking Add.

<b>General</b>	
Project Name Oak Hills Local Building Project	Record Number
Project Number SFC-080001.01	Creator Matthew Weber
Organization Name	Creation Date
Facility Name	Status
Title * Test Application for Payment	Request Date
Contract Reference * Jill's Contracting	Contractor Name Joe General Contractor
Final Payment? * No	EDGE Certified Prime? Yes
Retainage Release Requested? No	Contract Type CM at Risk
<b>Period From *</b> 08/01/2020	<b>Period To *</b> 08/31/2020
Internal Ref. Number	A/E Approval Date
	PM Approval Date
	Received Date

Attachments Comments Links

Information  
No Attachments.



# Complete General Block

- e) Select whether this is the **Initial Pay Request**

If this is not your initial pay request, follow steps i, j, k  
**Very Important!**

- f) Click **Select** to choose previous pay request.
- g) Choose your Previous Pay Request from list
- h) Click **Open**

Create New Applications for Payment K12 - Project No. SFC-080001.01 - Google Chrome  
ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uafpk/1086/3017?\_uref=uuu759905007t4

Applications for Payment K12

Search | Find on Page

Title	Contract SOV	Contractor Name	Percent Complete	Total Payment Requested	Sum of Payments	Earned To Date	i	Pi
Tom Sommer	Jill's Contracting	Joe General Contractor	28	140,000.00	140,000.00	140,000.00		
Katie Tuttle	Katie's Contra...	Joe General Contractor	1.63	13,000.00	13,000.00	13,000.00		
Katie's App. for Paym...	Joe Contracto...	Joe General Contractor		80,000.00	80,000.00	80,000.00		
Student 3	Test 2 SOV	Joe General Contractor		21,250.00	21,250.00	21,250.00		
Student 2	Jill's Contracting	Joe General Contractor		95,000.00	95,000.00	95,000.00		
Student 1	Katie's Contra...	Joe General Contractor	0.5	4,000.00	4,000.00	4,000.00		
PR1	Jill's Contracting	Joe General Contractor	10	50,000.00	50,000.00	50,000.00		
Jill's Contracting PR2	Test SOV	Joe General Contra...	63.72	36,800.00	321,800.00	321,800.00		
App #001	Test SOV	Joe General Contractor	0	285,000.00	285,000.00	285,000.00		
Test for Stored Materi...	Test SOV	Joe General Contractor	0	173,760.00	173,760.00	180,000.00		

Total: 18

Cancel Select

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

Initial Pay Request? **f**  
No

Previous Pay Request \* **g**  
Jill's Contracting PR2

Period From 09/01/2016 **f**  
Period To 09/30/2016

Previous PR Vendor  
Joe General Contractor

**h**  
Information  
No Attachments.



# Review SOV

- ▶ Prior to adding lines to your pay request, you may want to view the remaining balance on your SOV (Schedule of Values)
- ▶ Click the Menu the top of the record
- ▶ Click **SOV**

The screenshot shows a web browser window titled "Create New Applications for Payment K12 - Project No. SFC-080001 - Google Chrome". The URL is "ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uafpk/1084/2969?\_uref=uuu472297501t4". The page title is "Create New Applications for Payment K12". There are "Send" and "Save" buttons at the top right. A dropdown menu is open, showing options: "SOV", "Export Line Item Template", "Print", "Reload", "Review ...", "Help", and "Close". The "SOV" option is highlighted. The main form has a "General" tab selected. The form fields are as follows:

General	
Project Name	Record Number
OAKS CI District Training Project 1	
Project Number	Creator
SFC-080001	Matthew Weber
Organization Name	Creation Date
OAKS CI District Training Project - 1	
Facility Name	Status
Title *	Request Date
SFC-100057-01 P1	



# Review SOV

- ▶ This allows you to look at the **Scheduled Value** and **Commits Remaining Balance** for each of the line items on your SOV

Schedule of Values - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/psov/view/processing?docid=0&recordid=2014&\_uref=uuu759905007t4

File Edit View

Export Import Rows Split Fund Assignment

Schedule of Values

Currency: United States Dollar (USD)

Item #	Ref.	WBS Item	WBS Code	Breakdown	Scheduled Value	Commits Remaining Balance
000010	1	GC Labor	<a href="#">CE-01-OTL</a>		100,000.00	60,000.00
000020	2	GC Material	<a href="#">CE-01-OTM</a>		100,000.00	75,000.00
000030	3	Metal Labor	<a href="#">CE-FC-05L</a>		150,000.00	112,500.00
000040	4	Metal Material	<a href="#">CE-FC-05M</a>		150,000.00	112,500.00
				Total:	500,000.00	360,000.00

Close



# Add Line Items

- ▶ You will next enter a Line Item corresponding to each item on the Schedule of Values (SOV) from the agreement for which payment is requested:

- a) Click on the **Pay Request Details** Tab
- b) Click Add

10



# Add Line Items

- ▶ Enter a Short Description for each Line Item
  - ▶ Enter the % complete in the % **Services Complete** column
- OR**
- ▶ For a DPE or Reimbursable enter the dollar amount under the **DPE or Reimbursable Column**
  - ▶ Click **Save** once all Line Items have been added

Create New Applications for Payment K12 - Project No. SFC-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uafpk/1084/2969?\_uref=uuu472297501t4

### Create New Applications for Payment K12

General Pay Request Details

Cancel Error Check **Save**

Ref.	SOV Refe... Num...	WBS Code	Code Name	Commit Short Description	Short Description *	Subcontracto...	Scheduled Value	% Labor Complete	Materials % Complete	% Services Complete	DPE or Reimbursable...
001	1	AE-BS-CA	AE Construction ...	Building 1	First Descripti...		115,000.00	0	0	70	0.00
002	2	AE-BS-CA	AE Construction...	Building 2	[Required]		115,000.00	0	0	50	0.00
003	3	AE-BS-CA	AE Construction ...	Building 3			115,000.00	0	0	50	0.00
004	4	AE-BS-CA	AE Construction ...	Building 4			115,000.00	0	0	50	0.00
005	5	AE-BS-CA	AE Construction ...	Building 5			115,000.00	0	0	50	0.00
TOTAL							575,000.00	0	0	270	0.00

Total: 5



# Add Line Items

- ▶ Line item information will now display in the Pay Request Details tab
- ▶ Scroll to the right to view total amount **Earned This Period**

Create New Applications for Payment K12 - Project No. SFC-080001.01 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7527/1?\_uref=uuu759905007t4

### Create New Applications for Payment K12

General **Pay Request Details** Send Save

Ref.	SOV Refe... Num...	WBS Code	Code Name	Commit Short Description	Short Description *	Subcontr... Name	Subcontracto...	Scheduled Value	% Labor Complete
001	1	CE-01-OTL	General Condition...	GC Labor	General Labor	Labor LLC		100,000.00	40
002	3	CE-FC-05L	Metals Labr	Metal Labor	Metal Work	Metal SCN		150,000.00	25
TOTAL								250,000.00	65

Total: 2

Information  
Details of the line item is not available. Select a line item to view the details.



# Add Line Items

- ▶ In the bottom row you will see the total amount for each column
- ▶ **Please Note:** The **Earned this Period** column should **NEVER** reflect a negative amount
- ▶ Next you will return to the **General** tab to compare this number to the **Current Earned** field

Create New Applications for Payment K12 - Project No. SFC-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uafpk/1084/2969?\_\_uref=uuu472297501t4

Create New Applications for Payment K12

General Pay Request Details

Cancel Error Check Save

Previous Services	Services This Period	Services To Date	Previous DPE/Reimb	DPE/Reimb This Period	DPE/Reimb To Date	Previously Earned	Earned To Date	Earned This Period
0,500.00	0.00	80,500.00	0.00	0.00	0.00	80,500.00	80,500.00	0.00
7,500.00	0.00	57,500.00	0.00	0.00	0.00	57,500.00	57,500.00	0.00
7,500.00	28,750.00	86,250.00	0.00	0.00	0.00	57,500.00	86,250.00	28,750.00
7,500.00	28,750.00	86,250.00	0.00	0.00	0.00	57,500.00	86,250.00	28,750.00
7,500.00	28,750.00	86,250.00	0.00	0.00	0.00	57,500.00	86,250.00	28,750.00
0,500.00	86,250.00	396,750.00	0.00	0.00	0.00	310,500.00	396,750.00	86,250.00

Total: 5



# Add Line Items

- ▶ Click the **General** tab
- ▶ Scroll down to the **Earned Current Request** section
- ▶ Verify the **Current Earned** amount is equal to the **Earned this Period** from the Pay Request Details tab

Create New Applications for Payment K12 - Project No. SFC-080001 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uafpk/1084/2969?\_uref=uuu472297501t4

### Create New Applications for Payment K12

Send Save

**General** Pay Request Details

#### Earned Current Request

Current Services	86,250.00	Current Material	0.00
Current Labor	0.00	Stored Materials	0.00
Current DPE/Reimb	0.00		
Current Labor Total	86,250.00	Current Materials Total	0.00
		<b>Current Earned</b>	<b>86,250.00</b>

Completed to Date

Retainage

Withheld Amounts

Attachments Comr

Information  
No Attachments.



# Upload and Attach Documents

▶ Upload and Attach any necessary documents:

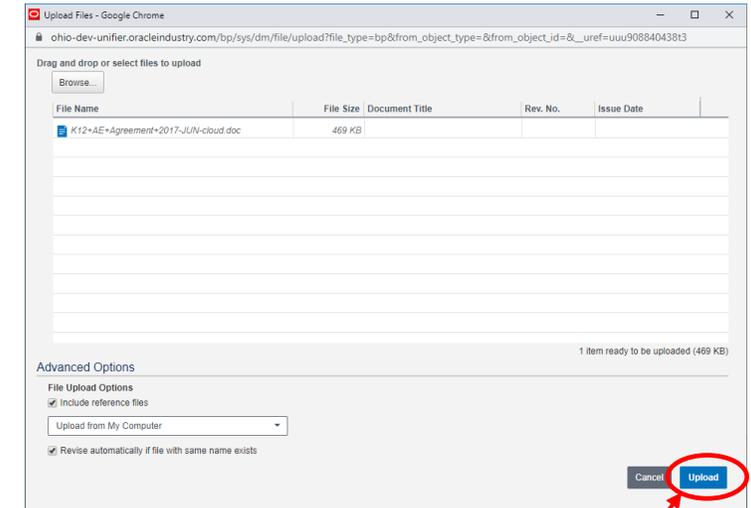
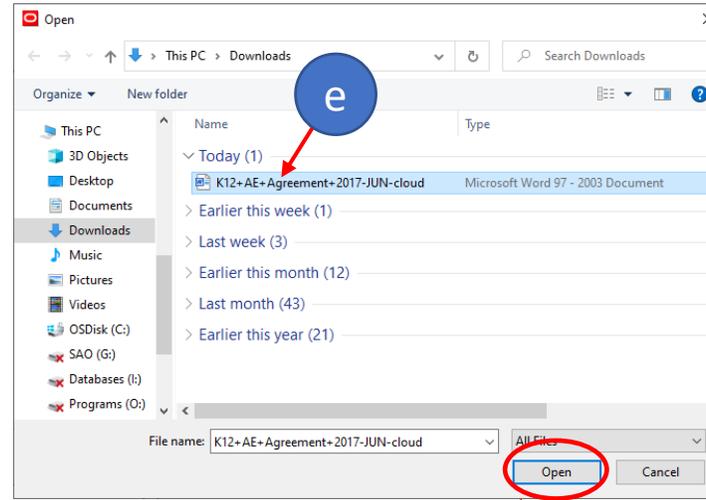
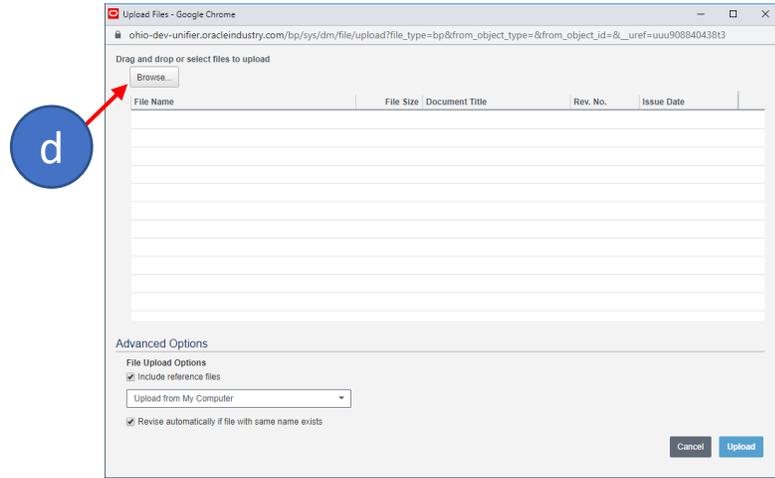
- a) Select the **Attachments Tab**
- b) Click the **Upload Button**
- c) Select **Browse**

The screenshot shows a web browser window with the URL `ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7527/1?__uref=uuu759905007t4`. The page title is "Create New Applications for Payment K12". The "General" tab is selected and circled in red. The "Attachments" tab is also circled in red. A blue circle labeled 'a' points to the "Attachments" tab. A blue circle labeled 'b' points to the "Upload" button (a blue square with a white document icon) in the Attachments section. A blue circle labeled 'c' points to the "Browse..." option in the dropdown menu that appears after clicking the Upload button. The main content area shows an "Earned Current Request" table with the following data:

Earned Current Request	
Current Services	0.00
Current Labor	72,500.00
Current DPE/Reimb	0.00
Current Labor Total	72,500.00
Current Material	0.00
Stored Materials	0.00
Current Materials Total	0.00
Current Earned	72,500.00

Below the table are sections for "Completed to Date", "Retainage", "Withheld Amounts", and "Escrow Paid to Rank". On the right side, there is an "Attachments" section with a blue circle labeled 'b' pointing to the "Upload" button. Below it, there is an "Information" section with a blue circle labeled 'i' and the text "No Attachments."

# Upload and Attach Documents (PC)



A window will pop up to upload the files.

- d) Click Browse
- e) Select the file from your computer
- f) Click Open
- g) Click Upload

# Submit Record

- ▶ Attachments populate below
- ▶ When the record is ready to move forward, click **Send**

Create New Applications for Payment K12 - Project No. SFC-080001.01 - Google Chrome

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/opendraft/7527/1?\_uref=uuu759905007t4

### Create New Applications for Payment K12

General Pay Request Details

#### Earned Current Request

Current Services	0.00	Current Material	0.00
Current Labor	72,500.00	Stored Materials	0.00
Current DPE/Reimb	0.00		
Current Labor Total	72,500.00	Current Materials Total	0.00
		Current Earned	72,500.00

Completed to Date

Retainage

Withheld Amounts

Escrow Paid to Bank

#### Attachments

Name
Unpublished Attachments
<input checked="" type="checkbox"/> image1.png

Total: 1



# Submit Record

- ▶ Verify Workflow Action: **Submit**
- ▶ Click **Send**

The screenshot shows a web browser window with the title 'Create New Applications for Payment K12 - Project No. SFC-080001 - Google Chrome'. The URL is 'ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/uafpk/1084/2969?\_uref=uuu472297501t4'. The main content area is a form titled 'Create Workflow Action Details'. The 'General' tab is active. Under 'Action Details', the 'Workflow Actions' dropdown menu is open, and 'Submit' is selected. Below this, the 'To' field contains a list of names: 'Archana Atrey;Jordan Zamary;Lance Witcher;Matthew Weber;Purna Irukulapati;Rita Nichols;Sha...'. The 'CC' field is empty with the placeholder text 'Start typing for suggestions...'. Under 'Due Date Details', the 'Task Due Date' field is empty. At the bottom of the form, there is a message: 'Task Due Date is not available'. There are two buttons: 'Cancel' and 'Send'. The 'Send' button is circled in red, and a red arrow points to it.

# Questions?

Please contact OAKS CI Support Desk:

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

614.644.2211

