



Subcontractor/Material Supplier Declaration- A/E

K12 Cloud

Purpose & Procedure

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

- ▶ Workflow

Created by: A/E → Submitted to: PM Declaration Review →
Sent to: A/E Update (if necessary) → Sent to: PC Validation
→ Sent to: 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
 - ▶ Add Attachments
 - ▶ Edge Affidavit (if applicable)
 - ▶ Executed Subcontract Form

Create a New Subcontractor and Supplier Declaration Record

- ▶ In Oaks CI navigate to:
 - ▶ Logs -> Subcontractor/Supplier Declaration K12
 - ▶ Click Create

The screenshot displays the Oracle Primavera Unifier (Development) interface. The top navigation bar shows 'ORACLE PRIMAVERA Unifier (Development)' and the current location is 'School Facilities > OAKS CI District...'. The left-hand navigation menu is open, with 'Logs' highlighted in red. A red arrow points from the 'Logs' menu item to the 'Subcontractor/Supplier Dec...' option in the main content area. In the main content area, the 'Subcontractor/Supplier Declaration' page is visible, featuring a '+ Create' button circled in red. Below the button is a table with the following data:

Subcontractor/Supplier	Type
Jeremy's Consulting	Cor
Katie's Consulting	Cor
Sam's Consultants	Cor

The bottom of the screen shows a 'Total: 3' indicator.

Form Completion

- ▶ Complete General and the Declaration Information sections
- ▶ The Title should house the name of the company utilized

The screenshot shows a web browser window with the URL <https://ohio-dev-unifier.oracleindustry.com/bp/process/new?copy=1&attach=true&fromModel=usdk1&fromSource=simple&fromModelId=1&wftempla>. The browser title is "Subcontractor/Supplier Declarations K12 - Jeremy's Consulting - Project No. SFC-080001 - Mozilla Firefox".

The form is titled "Subcontractor/Supplier Declarations K12" and has a "General" tab selected. The "General" section contains the following fields:

- Project Number: SFC-080001
- Project Name: OAKS CI District Training Project 1
- Organization Name: OAKS CI District Training Project - 1
- Facility Name: (empty)
- Title: Jeremy's Consulting *
- Contract Name: District Training Test Select... *
- Record Number: (empty)
- Creator: Katie Tuttle
- Creation Date: (empty)
- Status: (empty)
- Contractor Name: Dynamix Engineering

The "Declaration Information" section contains the following fields:

- Type: Consultant *
- Tier 1: Yes *
- Subcontractor/Supplier Name: Jeremy's Consulting *
- Federal Tax ID: 44-444444 *
- Primary Officer: Jeremy Smith *
- Address Line 1: 30 W. Spring St. *
- Address Line 2: (empty)
- City: Columbus *
- State: Ohio *
- ZIP: 43215 *
- Subcontracted by: (empty)
- Contact Person: Jeremy Smith *
- Phone No.: 614-555-5555 *
- Fax No.: (empty)
- Email Address: jsmith@email.com *

Annotations on the form include:

- A red circle around the "General" tab label.
- A red circle around the "Declaration Information" tab label.
- A red box around the "Title" field with a red arrow pointing to a callout box that says "Use the Tier 1 dropdown box to indicate if this is a Tier 1 Sub".
- A red box around the "Tier 1" dropdown menu with a red arrow pointing to the same callout box.
- A red box around the "Required fields have a red asterisk (*)" text with a red arrow pointing to the asterisks on the form fields.

At the bottom of the form, there are sections for "Action Details", "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

Form Completion

- ▶ Scroll down the form to complete the Additional Details block

The screenshot shows a web browser window with the following details:

- Browser Title:** Subcontractor/Supplier Declarations K12 - Jeremy's Consulting - Project No. SFC-080001 - Mozilla Firefox
- URL:** https://ohio-dev-unifier.oracleindustry.com/bp/process/new?copy=1&attach=true&fromModel=usdk1&fromSource=simple&fromModelId=1&wftempla
- Workflow Actions:** Submit, Send, Save, Spelling, Undo Accept Task, Add Attachment, Discussion, Close Window
- General Section:**
 - Subcontractor/Supplier Name: *
 - Federal Tax ID: *
 - Primary Officer: *
 - Address Line 1: *
 - Address Line 2: *
 - City: *
 - State: *
 - ZIP: *
 - Subcontracted by: *
 - Contact Person: *
 - Phone No.: *
 - Fax No.: *
 - Email Address: *
- Additional Details Section:** (Circled in red)
 - Subcontractor PO Date: *
 - Subcontractor/P.O. Amount \$: *
 - Services/Material Brands: *
 - Skilled Trade License No.: *
 - DFSP Enrolled: *
 - EDGE Certified Sub?: *
 - EDGE Certification Number: *
 - MBE: *
- Document Publishing**
- Action Details**
- Footer:** Attachments (0), [Linked Records \(0\)](#), [General Comments](#), [Linked Mail \(0\)](#)

Annotation: A red box contains the text "If EDGE Certified Sub is YES, the EDGE Certification Number must be filled in." with a red arrow pointing to the "EDGE Certification Number" field.

Send the Declaration for Review

- ▶ Add any attachments as necessary
- ▶ Verify Workflow Action
- ▶ Click Send

Subcontractor/Supplier Declarations K12 - Jeremy's Consulting - Project No. SFC-080001 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/new?copy=1&attach=true&fromModel=usdk1&fromSource=simple&fromModelId=1&wfempla 110%

File Edit View Actions Help

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

Subcontractor/Supplier Declarations K12

General

Subcontractor/Supplier Name: *

Federal Tax ID: *

Primary Officer: *

Address Line 1: *

Address Line 2: *

City: *

State: *

ZIP: *

Subcontracted by: *

Contact Person: *

Phone No.: *

Fax No.: *

Email Address: *

Additional Details

Subcontractor PO Date: *

DFSP Enrolled: *

Action Details

Submit

To... Task Due: 06/28/2017

Cc...

Send For: Declaration Review

Task Notes:

[Workflow Progress](#)

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

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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