



# Subcontractor/Material Supplier Declaration-Contractor

K12 Cloud

# Purpose & Procedure

- ▶ The Subcontractor Supplier Declaration Business Process (BP):
  - ▶ Provides for the submittal, review, and approval of contractor's subcontractors and material suppliers
  - ▶ Tracks important EDGE and subcontractor information once a subcontractor/supplier is approved
- ▶ Workflow

Created by: **Contractor** → Submitted to: **A/E Review** → Sent to: **Contractor Update (if necessary)** → Sent to: **PM Declaration Approval** → Sent to: **PC Declaration Validation** → Sent to: **Contractor Validation Update and Subcontract Attachment (if necessary)**

# Create a New Subcontractor and Supplier Declaration Record

- ▶ In Oaks CI navigate to:
  - ▶ Logs -> Subcontractor/Supplier Declaration K-12
  - ▶ Click Create

The screenshot shows the Oracle Primavera Unifier (Development) interface. 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 'Subcontractor/Supplier Declaration' menu item at the bottom of the list. The main content area displays the 'Subcontractor/Supplier Declaration' page, with a '+ Create' button circled in red. Below the button is a table with columns for 'Subcontractor/Supplier' and 'Type'. The table contains 17 rows of data, including entries like 'Andy's', 'Bob's Concrete', 'Bob's Concrete', 'Bobs concrete', 'Dave the plumber', 'ELH Engieneering', 'Joe General Contracting', 'Joe General Contractor', 'John's Jons', 'Katie's Concrete', 'Katie's Plumbing', 'Katie's Roofing', 'Mike's Masonry', 'Monroe Manufacturing', 'Russ James Excavating', and 'Stacey's Trucking'. The bottom right corner of the table shows 'Total: 17'.

| Subcontractor/Supplier  | Type     |
|-------------------------|----------|
| Andy's                  | Subcontr |
| Bob's Concrete          | Material |
| Bob's Concrete          | Consulta |
| Bob's Concrete          | Material |
| Bobs concrete           | Material |
| Dave the plumber        | Subcontr |
| ELH Engieneering        | Subcontr |
| Joe General Contracting | Subcontr |
| Joe General Contractor  | Subcontr |
| John's Jons             | Material |
| Katie's Concrete        | Subcontr |
| Katie's Plumbing        | Subcontr |
| Katie's Roofing         | Subcontr |
| Mike's Masonry          | Subcontr |
| Monroe Manufacturing    | Subcontr |
| Russ James Excavating   | Subcontr |
| Stacey's Trucking       | Subcontr |

# Form Completion

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

Subcontractor/Supplier Declarations K12 - Bob's Concrete - Project No. SFC-080001.01 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/new?copy=1&fromModel=usdk1&fromSource=simple&fromModelId=6&module\_name=usdk1&project\_id=11

File Edit View Actions Help

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

**General** Subcontractor/Supplier Declarations K12

General

Complete one record for each subcontractor and material supplier used.

Project Number: SFC-080001.01

Project Name: Oak Hills Local Building Project

Organization Name:

Facility Name:

Title: Bob's Concrete \*

Contract Name: Test Contract 3 Select.. \*

Record Number:

Creator: Katie Tuttle

Creation Date:

Status:

Contractor Name: Joe General Contractor

**Declaration Information**

Type: Material Supplier \*

Subcontractor/Supplier Name: Bob's Concrete \*

Federal Tax ID: 32-0000000 \*

Primary Officer: Bob Brown \*

Address Line 1: 4200 Surface Rd. \*

Address Line 2:

City: Columbus \*

State: Ohio \*

ZIP: 43215 \*

Tier 1: Yes \*

Subcontracted by: \*

Contact Person: Brian Brown \*

Phone No.: 614-555-5555 \*

Fax No.: NA

Email Address: bob@email.com \*

Action Details

Attachments (0) Linked Records (0) General Comments Linked Mail (0)

Use the Tier 1 dropdown box to indicate if this is a Tier 1 Sub

Required fields have a red asterisk (\*)

# Form Completion

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

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https://ohio-dev-unifier.oracleindustry.com/bp/process/new?copy=1&fromModel=usdk1&fromSource=simple&fromModelId=6&module\_name=usdk1&project\_id=1

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: Bob's Concrete \*  
Federal Tax ID: 32-0000000 \*  
Primary Officer: Bob Brown \*  
Address Line 1: 4200 Surface Rd. \*  
Address Line 2: \*  
City: Columbus \*  
State: Ohio \*  
ZIP: 43215 \*

Subcontracted by: \*  
Contact Person: Brian Brown \*  
Phone No.: 614-555-5555 \*  
Fax No.: NA

**Additional Details**

Subcontractor PO Date: 04/08/2016 \*  
Subcontractor/P.O. Amount \$: 50,000.00 \*  
Services/Material Brands: Concrete \*  
Skilled Trade License No.: 85208520

DFSP Enrolled: Yes \*  
EDGE Certified Sub?: Yes \*  
EDGE Certification Number: 123456789  
MBE: Yes

**Document Publishing**

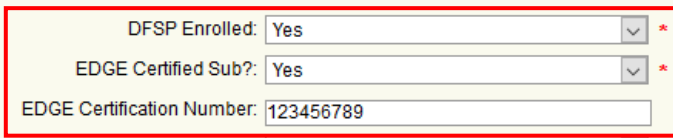
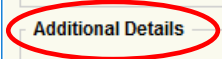
Documents uploaded from the desktop will be stored in the Publish Path directory noted below.

FilePath: SMSD  
Publish Path: SMSD/Joe General Contractor/Bob's Concrete

**Action Details**

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

If EDGE Certified Sub is YES, the EDGE Certification Number must be filled in.



# Send the Declaration for Review

- ▶ Verify Workflow Action
- ▶ Click Send

Subcontractor/Supplier Declarations K12 - Bob's Concrete - Project No. SFC-080001.01 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/new?copy=1&fromModel=usdk1&fromSource=simple&fromModelId=6&module\_name=usdk1&project\_id=11

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: Bob's Concrete \*

Federal Tax ID: 32-0000000 \*

Primary Officer: Bob Brown \*

Address Line 1: 4200 Surface Rd. \*

Address Line 2: \*

City: Columbus \*

State: Ohio \*

ZIP: 43215 \*

Subcontracted by: \*

Contact Person: Brian Brown \*

Phone No.: 614-555-5555 \*

Fax No.: NA \*

Email Address: bob@email.com \*

**Additional Details**

Subcontractor PO Date: 04/08/2016 \*

Subcontractor/P.O. Amount \$: 50,000.00 \*

Services/Material Brands: Concrete \*

Skilled Trade License No.: R5208520 \*

DFSP Enrolled: Yes \*

EDGE Certified Sub?: Yes \*

EDGE Certification Number: 123456789 \*

MBE: Yes \*

**Action Details**

**Submit**

To... Archana Atrey,Barbara Taylor,Bill Schwerfager,

Cc... \*

Send For: AE Declaration Review

Task Notes:

[Workflow Progress](#)

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

# A/E Review Step

- ▶ The A/E will receive an email notification that they have a New Task
- ▶ Within 2 days:
  - ▶ Reviews the declaration for completeness and compliance with the contract documents
  - ▶ Performs one of the following Workflow Actions:
    - ▶ **Return for Clarification:** Send the record back to the Contractor for additional information and update
    - ▶ **Recommend Approval:** Recommends Approval by sending the record to the Project Manager

# PM Declaration Approval Step

## Project Manager (PM)

- ▶ Within 3 days:
  - ▶ 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 Reject
- ▶ **Note:** Once the Project Coordinator has validated the record and it is in the “Complete” status, it can be added to the Contract SOV record.

# Questions?

OAKS CI Support Desk Contact Info:

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