



Subcontractor/Supplier Declaration

K-12



Subcontractor/Supplier Declaration



Subcontractor/Supplier Declaration 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



Subcontractor/Supplier Declarations

Workflow Steps:



Click the boxes to navigate directly to each section



Subcontractor/Supplier Declaration Create (A/E)



Create Subcontractor/Supplier Declaration (A/E)

► Log into OAKS CI

a. Click + sign

b. Type project name or number in search bar

c. Click appropriate project to open

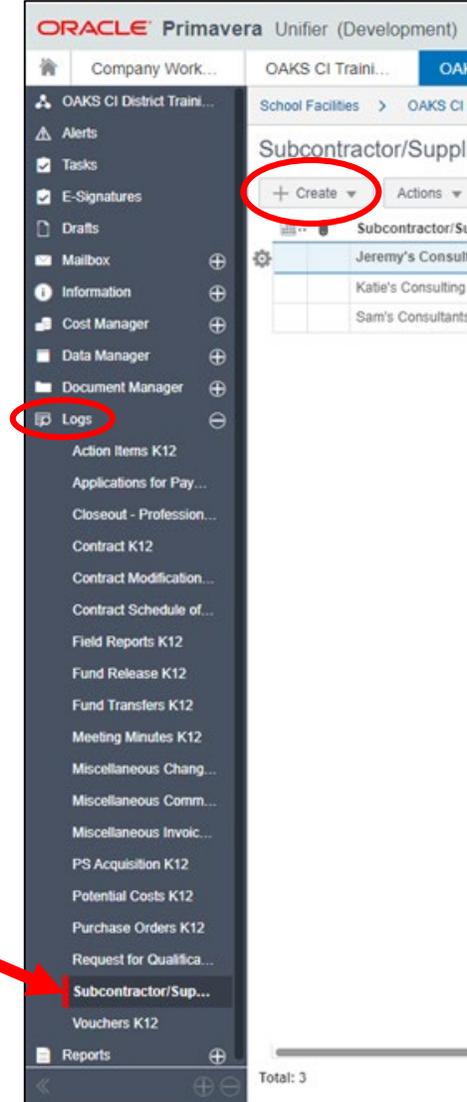
The screenshot shows a web browser window with the URL <https://ohio-unifier.oracleindustri...> and the page title "Service Requests". The browser's address bar shows the user ID "uuu600419530". The page has a navigation bar with several tabs, including "Company Work...", "ACF Fire Protec...", "OSHP - Academ...", "Company Work...", "IRJCF PREA R...", "Salt Fork State ...", and "Agency General...". A red box highlights a "+" sign in the top right corner of the navigation bar, labeled 'a'. Below the navigation bar, there is a search bar containing the text "DPS-". A red arrow points to the search bar, labeled 'b'. Below the search bar, a table of projects is displayed, with a red arrow pointing to the first row, labeled 'c'. 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



Create Subcontractor/Supplier Declaration (A/E)

- ▶ Once in your project:
 - ▶ Click **Logs** -> **Subcontractor/Supplier Declaration**
 - ▶ Click **Create**



Create Subcontractor/Supplier Declaration (A/E)

- ▶ Complete the General section
- a) **The Title should house the name of the company utilized**

Create New Subcontractor/Supplier Declarations K12 - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/usdk1/1084/2956?_uref=uuu257750360t3

Create New Subcontractor/Supplier Declarations K12

Send Save

General

General

Complete one record for each subcontractor and material supplier used.

Project Number	Record Number
SFC-080001	
Project Name	Creator
OAKS CI District Training Project 1	Matthew Weber
Organization Name	Creation Date
OAKS CI District Training Project - 1	
Facility Name	Status
Title *	
CTL Engineering	
Contract Name *	Contractor Name
SFC-080001-02-02 K12 T3	CTL Engineering

Attachments

Information
No Attachments.



Create Subcontractor/Supplier Declaration (A/E)

- ▶ Complete the **General Section**
- b) Click the button in the Contract Name field to select a Contract
- c) Choose a Contract from the new window
- d) Click **Select**

The screenshot displays the 'Create New Subcontractor/Supplier Declarations K12' web application. The main form is titled 'General' and contains the following fields:

- Project Number:** SFC-080001
- Record Number:** (empty)
- Project Name:** OAKS CI District Training Project 1
- Creator:** Matthew Weber
- Organization Name:** OAKS CI District Training Project - 1
- Creation Date:** (empty)
- Facility Name:** (empty)
- Status:** (empty)
- Title *:** CTL Engineering
- Contract Name *:** SFC-080001-02-02 K12 T3
- Contractor Name:** CTL Engineering

An 'Attachments' section is visible on the right side of the form.

A modal window titled 'Contract K12' is open, displaying a table of contracts. The table has columns for 'Contract No.', 'Contractor Name', 'Title', and 'Original Contract C...'. The first row is highlighted in blue. A red arrow labeled 'c' points to the first row, and another red arrow labeled 'd' points to the 'Select' button at the bottom right of the modal.

Contract No.	Contractor Name	Title	Original Contract C...
SFC-080001-02-03 T...	CTL Engineering	SFC-080001-02-02 K12 T3	
SFC-080001-02-02 Test	CTL Engineering	SFC-080001-02-02 Test	
SFC-080001-02-02 Test	CTL Engineering	SFC-080001-02-02 K12 OA Test	
SFC-080001-02-02 Test	CTL Engineering	SFC-080001-02-02 K12 OA Test	
SFC-080001-02-01 Test	Dynamix Engineering	SFC-080001-02-01 Test	
Morris 001		Contract Test Morris 001	
Morris 001		Contract Test Morris 001	
District Training Test 03	Dynamix Engineering	District Training Test	
03 District Training	Dynamix Engineering	CM District Training 003	
	Amazing Architectural Inc.	Dis. SOV Tempiaet Test	



Create Subcontractor/Supplier Declaration (A/E)

- ▶ Scroll down using the slider and complete the **Declaration Information** section

e) Fill out all required fields, denoted by a red asterisk *

f) Use the Tier 1 dropdown box to indicate if this is a Tier 1 subcontractor

e

Create New Subcontractor/Supplier Declarations K12 - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/usdk1/1084/2956?_uref=uuu257750360t3

Create New Subcontractor/Supplier Declarations K12

Send Save

General

Declaration Information

Type *
Material Supplier

Tier 1 *
Yes

Subcontractor/Supplier Name *
Bob's Concrete

Subcontracted by:

Federal Tax ID *
01-00000000

Contact Person *
Joe Boblaw

Primary Officer *
Bob Boblaw

Phone No. *
614-555-5555

Address Line 1 *
30 E Spring St

Fax No.
N/A

Address Line 2

Email Address *
bob@email.com

City *
Columbus

State *
Ohio

ZIP *
43215

Attachments
No Attachments.



Create Subcontractor/Supplier Declaration (A/E)

- ▶ Scroll down using the slider and complete the **Additional Details** section
- g) Fill out all required fields, denoted by a red asterisk *
- h) If the Subcontractor is EDGE Certified, select Yes from the dropdown. If Yes is selected, you must also fill out the EDGE Certification number field.

Create New Subcontractor/Supplier Declarations K12 - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/usdk1/1084/2956?__uref=uuu257750360t3

Create New Subcontractor/Supplier Declarations K12

Send Save

General

ZIP *
43215

Additional Details

Subcontractor PO Date: 05/01/2020

DFSP Enrolled *: No

Subcontractor/P.O. Amount \$ *: 100,000.00

EDGE Certified? *: Yes

EDGE Certification Number *: 123456789

Services/Material Brands *: Concrete

Skilled Trade License No.:

MBE: Yes

Attachments

Information
No Attachments.



Create Subcontractor/Supplier Declaration (A/E)

- ▶ Once the General tab is complete and the record is ready to move forward:
 - Click **Send** at the top right
 - Verify Workflow – **Submit**
 - Click the **Send** button
 - ▶ The record will move forward to the PM for Declaration Review

The image displays two screenshots of a web application interface for creating a Subcontractor/Supplier Declaration. The top screenshot shows the 'General' tab with a 'Send' button circled in red and labeled 'i'. The bottom screenshot shows a 'Workflow Action Details' dialog box with 'Submit' selected in the 'Workflow Actions' dropdown, labeled 'j', and a 'Send' button at the bottom right labeled 'k'.

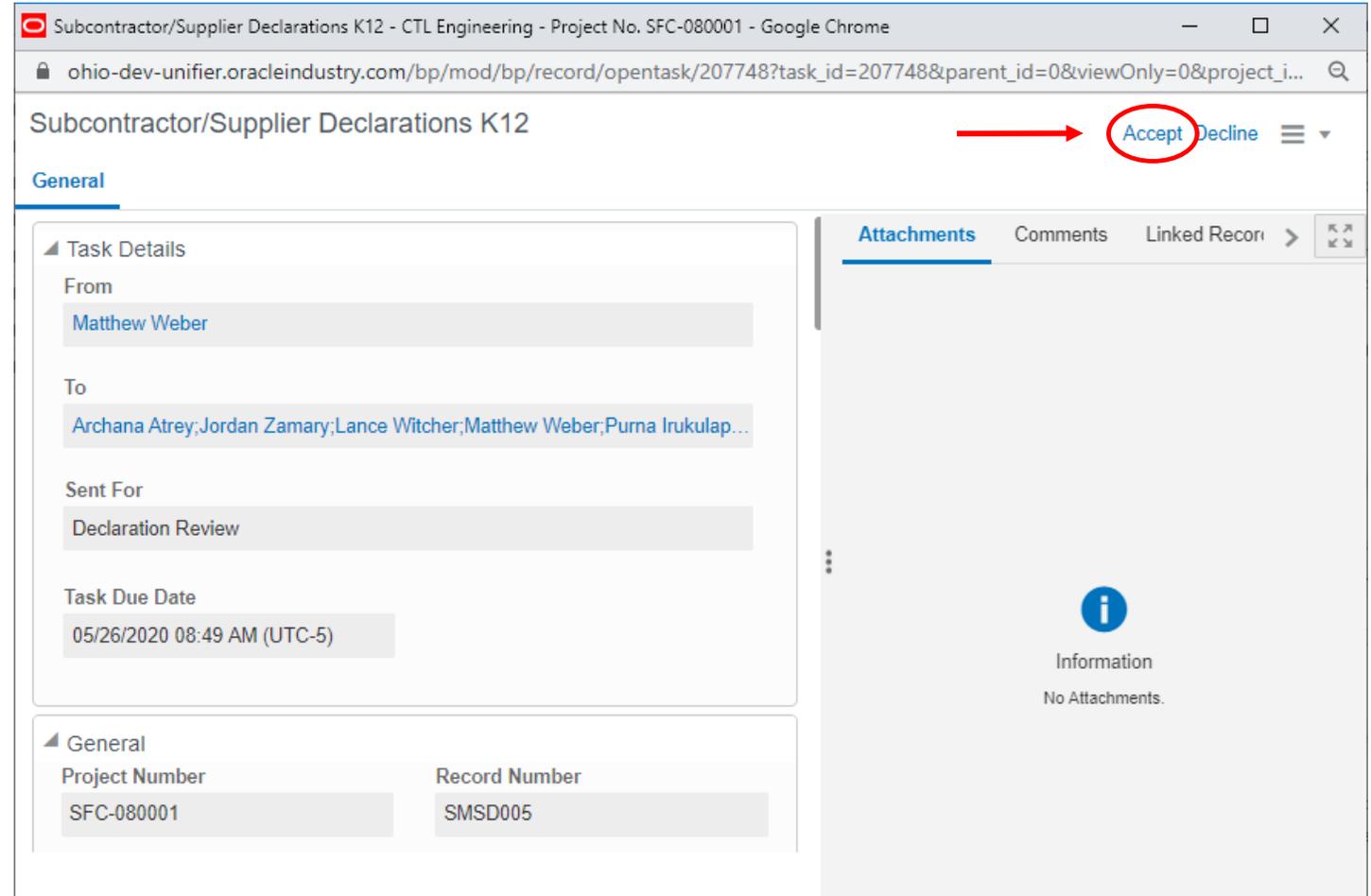


Subcontractor/Supplier Declaration Declaration Review (PM)



Accept the Task

- ▶ Click Accept to begin reviewing the record



Subcontractor/Supplier Declarations K12 - CTL Engineering - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/207748?task_id=207748&parent_id=0&viewOnly=0&project_i...

Subcontractor/Supplier Declarations K12

Accept Decline

General

Task Details

From: Matthew Weber

To: Archana Atrey; Jordan Zamy; Lance Witcher; Matthew Weber; Purna Irukulap...

Sent For: Declaration Review

Task Due Date: 05/26/2020 08:49 AM (UTC-5)

General

Project Number	Record Number
SFC-080001	SMSD005

Attachments Comments Linked Record

Information
No Attachments.



Review the Record

- a) Review the information in the General section of the record
- b) Scroll down to the Declaration Information section

a

Subcontractor/Supplier Declarations K12 - CTL Engineering - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/207748/undefined/undefined?_uref=uuu505365360t3

Subcontractor/Supplier Declarations K12

Send Save

General

Approve or reject the use of this subcontractor/material supplier on this contract.

General	
Project Number SFC-080001	Record Number SMSD005
Project Name OAKS CI District Training Project 1	Creation Date 05/21/2020 08:49 AM (UTC-5)
Organization Name OAKS CI District Training Project - 1	Creator Matthew Weber
Facility Name	Status Pending
Title CTL Engineering	
Contract Name SFC-080001-02-02 K12 T3	Contractor Name CTL Engineering

Attachments

No Attachments.



Review the Record

- c) Review the information in the **Declaration Information** section of the record
- d) Scroll down to the **Additional Details** section

c



d



Subcontractor/Supplier Declarations K12 - CTL Engineering - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/207748/undefined/undefined?__uref=uuu505365360t3

Subcontractor/Supplier Declarations K12 Send Save

General

Declaration Information

Type	Tier 1
Material Supplier	Yes
Subcontractor/Supplier Name	Subcontracted by:
Bob's Concrete	
Federal Tax ID	Contact Person
01-00000000	Joe Boblaw
Primary Officer	Phone No.
Bob Boblaw	614-555-5555
Address Line 1	Fax No.
30 E Spring St	N/A
Address Line 2	Email Address
	bob@email.com
City	
Columbus	
State	
Ohio	
ZIP	
43215	

Additional Details

Attachments

Information
No Attachments.



Review the Record

- e) Review the information in the **Additional Details** section of the record
- f) When the record is ready to move forward, click **Send**

e

Subcontractor/Supplier Declarations K12 - CTL Engineering - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/207748/undefined/undefined?__uref=uuu505365360t3

Subcontractor/Supplier Declarations K12

General

Additional Details

Subcontractor PO Date	05/01/2020	DFSP Enrolled	No
Subcontractor/P.O. Amount \$	100,000.00	EDGE Certified?	Yes
Services/Material Brands	Concrete	EDGE Certification Number	123456789
Skilled Trade License No.		MBE	Yes

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

FilePath

SMSD

Publish Path

SMSD/CTL Engineering/Bob's Concrete

Attachments

Information

No Attachments.

Send Save



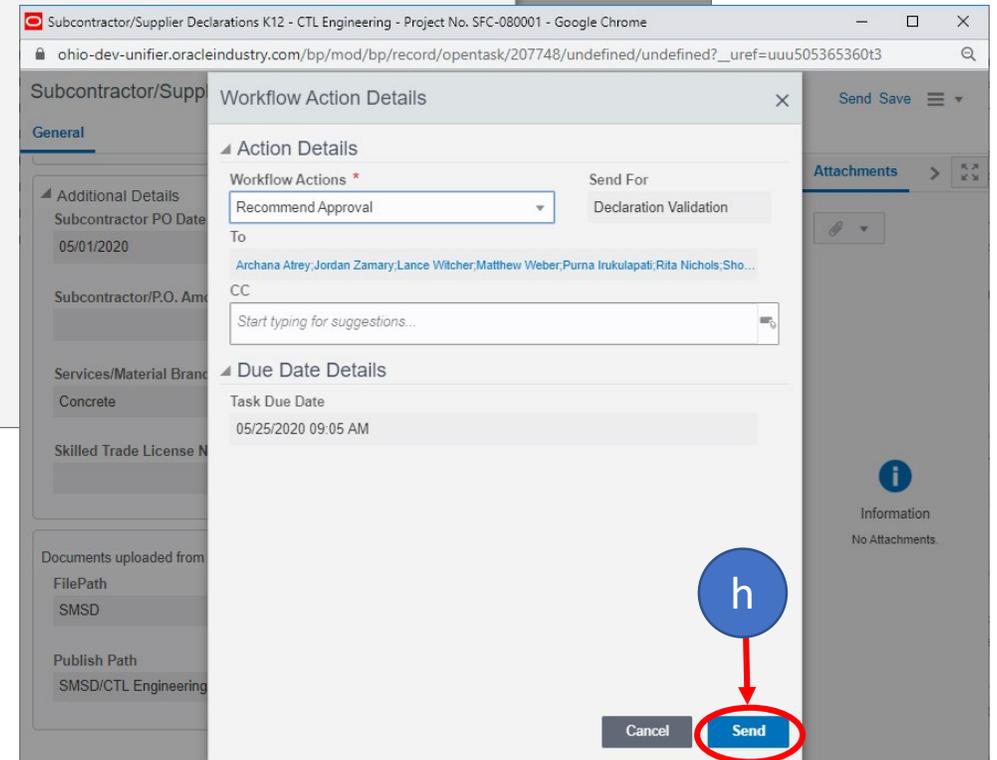
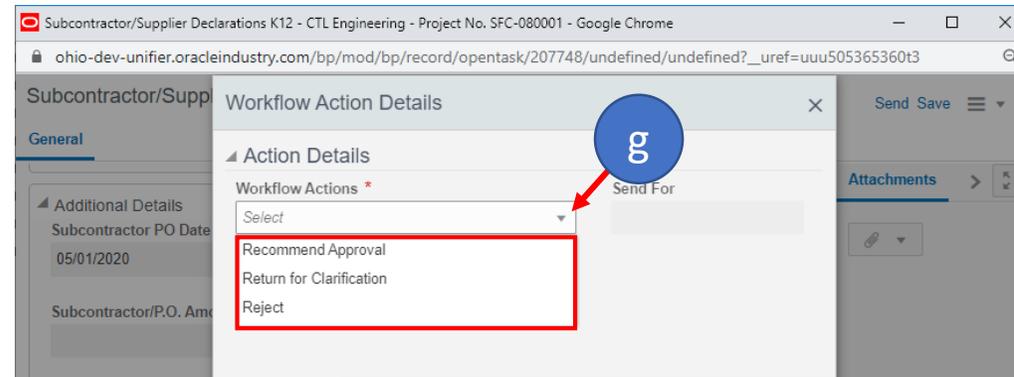
Send the Record

- ▶ Once the General tab is complete and the record is ready to move forward:

g) Select a Workflow Action

- ▶ **Recommend Approval** will move the record forward to PC for Declaration Validation
- ▶ **Return for Clarification** will return the record for Update
- ▶ **Reject** will terminate the record

h) Click the **Send** button



Subcontractor/Supplier Declaration Declaration Validation (PC)



Accept the Task

- ▶ Click Accept to begin reviewing the record

Subcontractor/Supplier Declarations K12 - CTL Engineering - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/207779?task_id=207779&parent_id=0&viewOnly=0&project_...

Subcontractor/Supplier Declarations K12

Accept Decline

General

Task Details

From
Matthew Weber

To
Archana Atrey; Jordan Zamary; Lance Witcher; Matthew Weber; Purna Irukula...

Sent For
Declaration Validation

Task Due Date
05/25/2020 09:09 AM (UTC-5)

General

Project Number
SFC-080001

Record Number
SMSD005

Attachments Comments Linked Recor

Information
No Attachments.



Review the Record

- a) Review the information in the General section of the record
- b) Scroll down to the Declaration Information section

Subcontractor/Supplier Declarations K12 - CTL Engineering - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/207779/undefined/undefined?_uref=uuu505365360t3

Subcontractor/Supplier Declarations K12

Send Save

General

Validate the Federal Tax ID, EDGE status, and DFWP enrollment of the proposed subcontractor or material supplier

General	
Project Number SFC-080001	Record Number SMSD005
Project Name OAKS CI District Training Project 1	Creation Date 05/21/2020 08:49 AM (UTC-5)
Organization Name OAKS CI District Training Project - 1	Creator Matthew Weber
Facility Name	Status Pending
Title CTL Engineering	
Contract Name SFC-080001-02-02 K12 T3	Contractor Name CTL Engineering

Attachments Comments Linked Recor

Information
No Attachments.

a

b



Validate the Record

- c) Review fields in the Declaration Information section, **Validate** the Federal Tax ID
- d) Scroll down to the Additional Details section

C

The screenshot shows a web browser window with the URL `ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/207779/undefined/undefined?_uref=uuu505365360t3`. The page title is "Subcontractor/Supplier Declarations K12". The form is titled "Declaration Information" and contains the following fields:

Type	Tier 1
Material Supplier	Yes
Subcontractor/Supplier Name	Subcontracted by:
Bob's Concrete	
Federal Tax ID *	Contact Person
01-00000000	Joe Boblaw
Primary Officer	Phone No.
Bob Boblaw	614-555-5555
Address Line 1	Fax No.
30 E Spring St	N/A
Address Line 2	Email Address
	bob@email.com
City	
Columbus	
State	
Ohio	
ZIP	
43215	

On the right side of the form, there is an "Attachments" section with a "Com" button and a "No Attachments" message. A red dashed arrow points from a blue circle with the letter "d" to the "Attachments" section. A blue circle with the letter "C" is positioned to the left of the form, with a red bracket pointing to the "Federal Tax ID" field.



Validate the Record

- e) Review fields in the Additional Details section
 - ▶ **Validate** DFSP Enrolled, EDGE Certified, and EDGE Certification Number

- f) Fill out the required **Validated?** Fields in the Subcontractor Supplier Validation section

Subcontractor/Supplier Declarations K12 - CTL Engineering - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/207779/undefined/undefined?_uref=uuu505365360t3

Subcontractor/Supplier Declarations K12

Send Save

General

Additional Details

Subcontractor PO Date
05/01/2020

DFSP Enrolled
No

Subcontractor/P.O. Amount \$
2,100

EDGE Certified?
Yes

Services/Material Brands
Concrete

EDGE Certification Number
123456789

Skilled Trade License No.

MBE
Yes

Subcontractor Supplier Validation

Federal Tax ID
01-00000000

Validated? *
Yes

DFSP Enrolled
No

Validated? *
Yes

EDGE Certified?
Yes

Validated? *
Yes

Attachments

Information
No Attachments



Send the Record

- g) When the record is ready to move forward, click **Send**

Subcontractor/Supplier Declarations K12 - CTL Engineering - Project No. SFC-080001 - Google Chrome

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/opentask/207779/undefined/undefined?_uref=uuu505365360t3

Subcontractor/Supplier Declarations K12

General

Additional Details

Subcontractor PO Date	DFSP Enrolled
05/01/2020	No
Subcontractor/P.O. Amount \$	EDGE Certified?
100,000.00	Yes
Services/Material Brands	EDGE Certification Number
Concrete	123456789
Skilled Trade License No.	MBE
	Yes

Subcontractor Supplier Validation

Federal Tax ID	Validated? *
01-00000000	Yes
DFSP Enrolled	Validated? *
No	Yes
EDGE Certified?	Validated? *
Yes	Yes

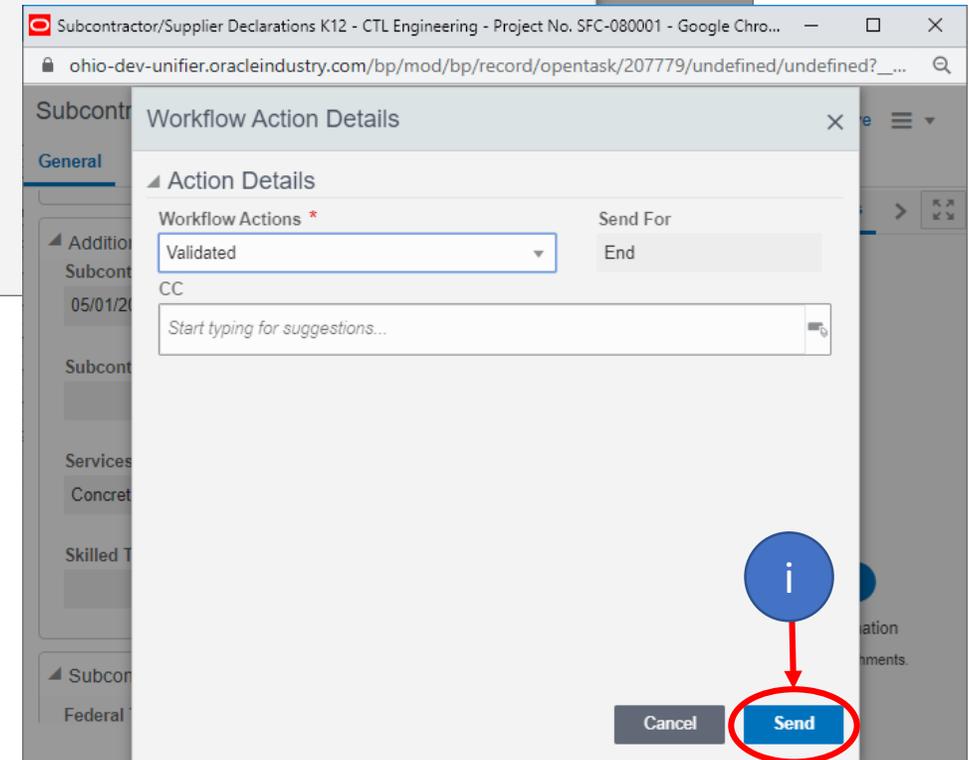
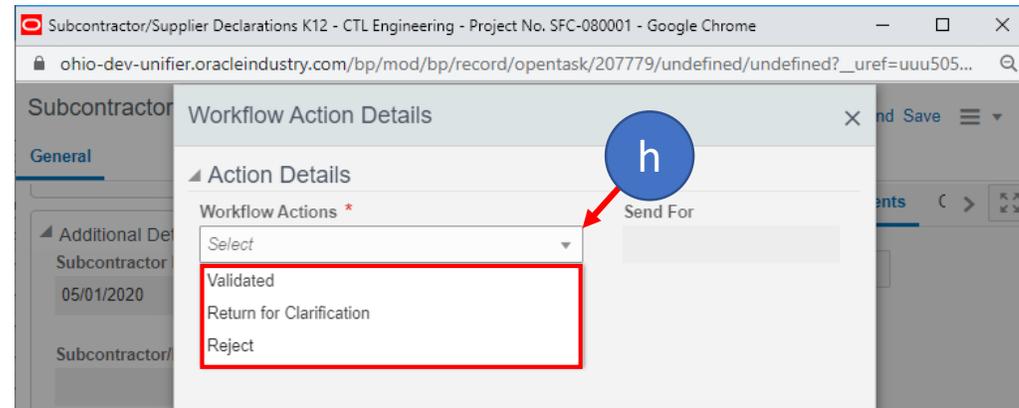
Attachments

Information
No Attachments.



Send the Record

- ▶ Once the record is ready to move forward:
- h) Select a Workflow Action
 - ▶ **Validated** will complete the record and end the workflow
 - ▶ **Return for Clarification** will return the record for Update
 - ▶ **Reject** will terminate the record
- i) Click the **Send** button



Validation Links

- Federal Tax ID Validation
 - <https://www.bwc.ohio.gov/employer/services/StateContract/nlbwc/StateContract1.aspx>
- Use this link to validate Drug Free Safety Workplace for subcontractors:
 - <https://www.bwc.ohio.gov/employer/services/StateContract/nlbwc/StateContract1.aspx>
- Use this link to validate EDGE for subcontractors and material suppliers:
 - <https://eodreporting.oit.ohio.gov/edge-certification>



Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211

