



# Subcontractor/Supplier Declaration



# Subcontractor/Supplier Declaration



# Subcontractor/Supplier Declaration

- ▶ Prior to submission of a Professional Services Pay Request that identifies an EDGE Consultant, the Consultant's SMSD record must be created by the A/E and approved in OAKS CI.



# Purpose & Procedure

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



# Subcontractor/Supplier Declarations

Workflow Steps:



*Click the boxes to navigate directly to each section*



# Create Subcontractor/Supplier Declaration Record (A/E)



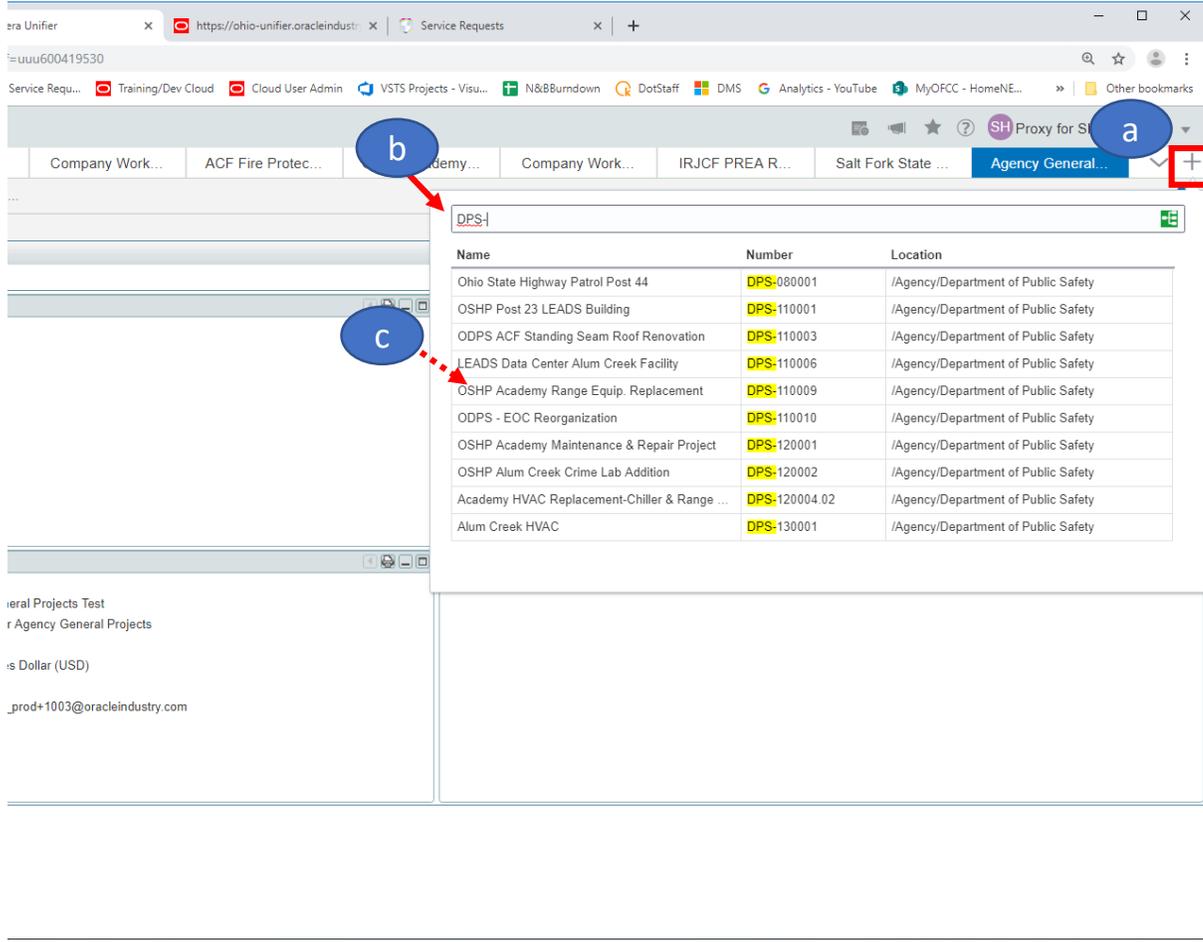
# Create Subcontractor/Supplier Declaration Record (A/E)

- ▶ Log into OAKS CI

  - a. Click + sign

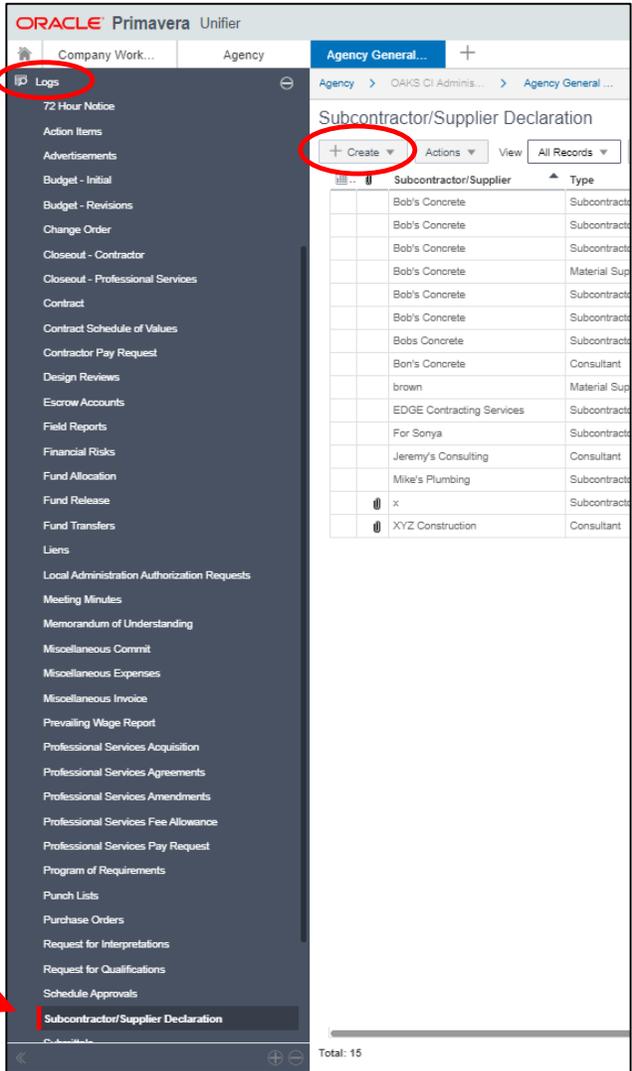
  - b. Type project name or number in search bar

  - c. Click appropriate project to open



# Create Subcontractor/Supplier Declaration Record (A/E)

- ▶ In OAKS CI navigate to:
  - ▶ Logs -> **Subcontractor/Supplier Declaration**
  - ▶ Click **Create**



# Create Subcontractor/Supplier Declaration Record (A/E)

## a) Complete the General section

- ▶ The fields marked with a red \* are required
- ▶ The **Title** should house the name of the company utilized

The screenshot shows a web browser window with the URL `ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/usd/1003/185704?_uref=uuu561762758t1`. The page title is "Create New Subcontractor/Supplier Declaration". The "General" tab is active, and the "Title" field is highlighted with a red box. The form contains the following fields:

NOTE: Only select either Contract Name or Professional Services Name	
Organization OAKS CI Test	Record Number
Project Number OCI-080001	Creation Date
Project Name Agency General Projects Test	Creator Matthew Weber
Project Location OAKS CI Administration	Status
Title * Matt's Consulting	Tier 1 Yes
Contract Name	Contractor Name
Professional Services Agreement Name Type a Title...	



# Create Subcontractor/Supplier Declaration Record (A/E)

b) Scroll down the form to complete the Declaration Information block

b

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

- Browser title: Create New Subcontractor/Supplier Declaration - Project No. OCI-080001 - Google Chrome
- URL: ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/usd/1003/185704?\_uref=uuu561762758t1
- Page title: Create New Subcontractor/Supplier Declaration
- Buttons: Send Save
- Section: General
- Section: Declaration Information
  - Type: Consultant
  - Subcontractor/Supplier: Matt's Consulting
  - Federal Tax ID: 99-9999999
  - Primary Officer 1: Matt Weber
  - Address Line 1: 30 W Sprint St
  - Address Line 2: (empty)
  - City: Columbus
  - State: Ohio
  - ZIP: 43215
  - Contact Person: Matt Weber
  - Phone No.: 6144381044
  - Fax No.: N/A
  - E-mail Address: matthew.weber@ofcc.ohio.gov
- Section: Additional Details



# Create Subcontractor/Supplier Declaration Record (A/E)

c) Scroll down the record and fill out the applicable fields in the Additional Details block

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

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

C

Create New Subcontractor/Supplier Declaration - Project No. OCI-080001 - Google Chrome

ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/usd/1003/185704?\_uref=uuu561762758t1

Create New Subcontractor/Supplier Declaration

Send Save

General

Fax No. \*  
N/A

E-mail Address \*  
matthew.weber@ofcc.ohio.gov

Additional Details

Subcontractor/P.O. Date  
04/16/2020 05:00 PM (UTC-5)

Subcontractor/P.O. Amount \$  
25,000.00

EDGE Certified? \*  
Yes

EDGE Certification Number  
123456789

MBE  
Select



# Create Subcontractor/Supplier Declaration Record (A/E)

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

*The record will now go to the PM for the Declaration Review Step*

Workflow Action Details

General

Fax No. \*  
N/A

E-mail Address \*  
matthew.we

Additional Subcontractor  
04/16/2020

Subcontractor

Action Details

Workflow Actions \*  
Submit

Send For  
PM Declaration Review

To  
Archana Atrey;Matthew Weber;Rita Nichols;Shauna Hooks;Steve Mayo;Project Manager

CC  
Start typing for suggestions...

Due Date Details

Task Due Date

Task Due Date is not available

Cancel Send



# **Subcontractor/Supplier Declaration Record PM Declaration Review**



# Subcontractor/Supplier Declaration Record PM Declaration Review

- ▶ PM receives an Email
- ▶ Click on the “Unifier Login” button to access the task

This is a system-generated e-mail message. Do not reply to sender.

**Project/Shell: Agency General Projects Test**

**Subcontractor/Supplier Declaration SSD-0017 is sent to you for PM Declaration Review.**

From : **Matthew Weber**  
Sent For : **PM Declaration Review**

Source Name : **Agency General Projects Test**  
Record No : **Subcontractor/Supplier Declaration SSD-0017**  
Title : **Matt's Consulting**

[Unifier Login](#)



# PM Declaration Review – Accept Task

- ▶ Click **Accept Task** to begin work on the record

The screenshot shows a web browser window displaying an Oracle BPM task record. The browser's address bar shows the URL: `ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2595726?task_id=2595726&parent_id=0&viewOnly=0&project_id=1003&model=usd&...`. The page title is "Subcontractor/Supplier Declaration". In the top right corner, there are two buttons: "Accept" and "Decline". The "Accept" button is circled in red, and a red arrow points to it from the left. Below the buttons is a "General" tab. The "Task Details" section shows: "From: Matthew Weber", "To: Archana Atrey;Matthew Weber;Rita Nichols;Shauna Hooks;Steve Mayo;Proje...", and "Sent For: PM Declaration Review". The "General" section contains a table with the following data:

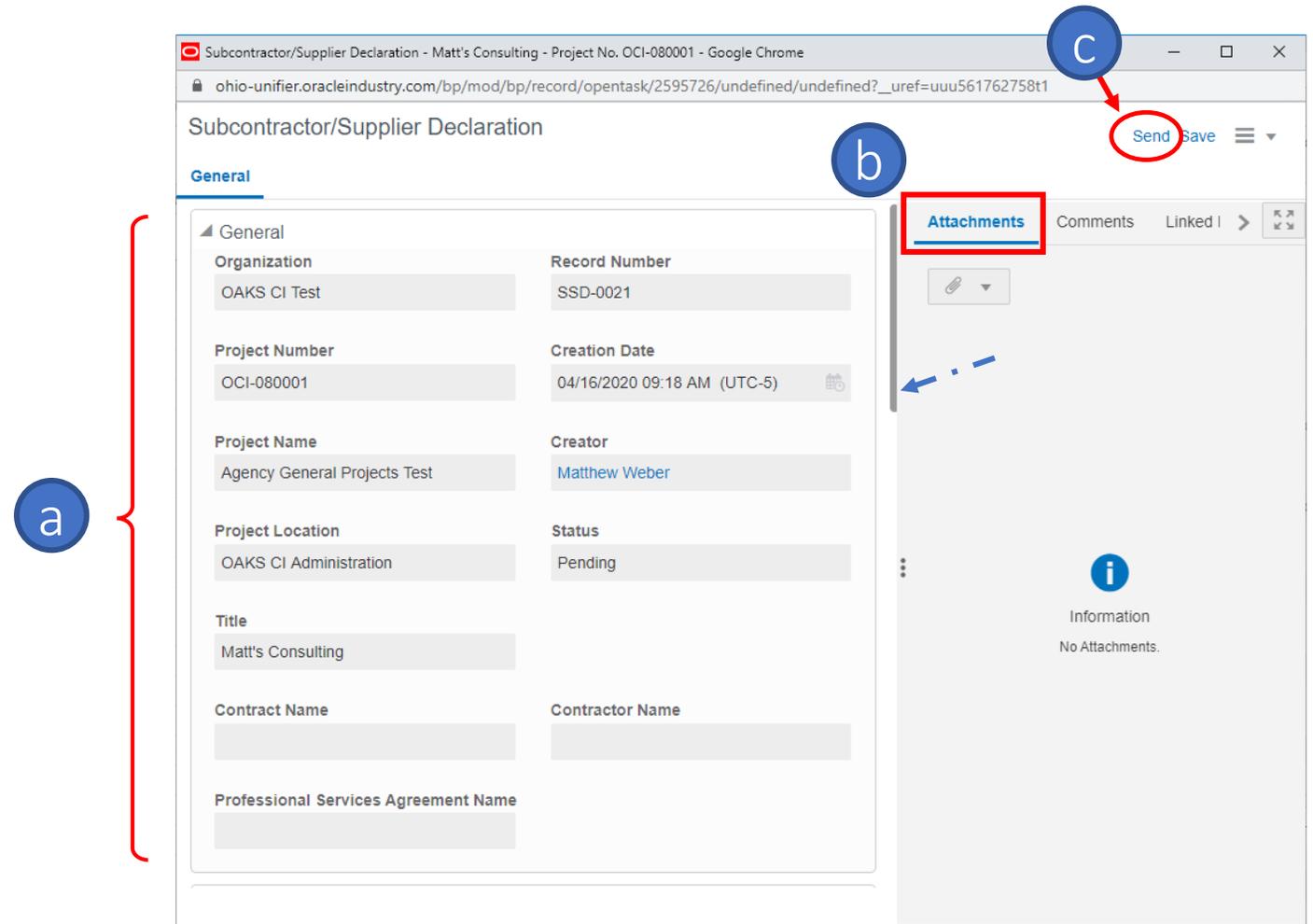
Organization	Record Number
OAKS CI Test	SSD-0021
Project Number	Creation Date
OCI-080001	04/16/2020 09:18 AM (UTC-5)

On the right side of the page, there is an "Attachments" tab, which is currently selected. Below it, there is an information icon and the text "Information No Attachments."



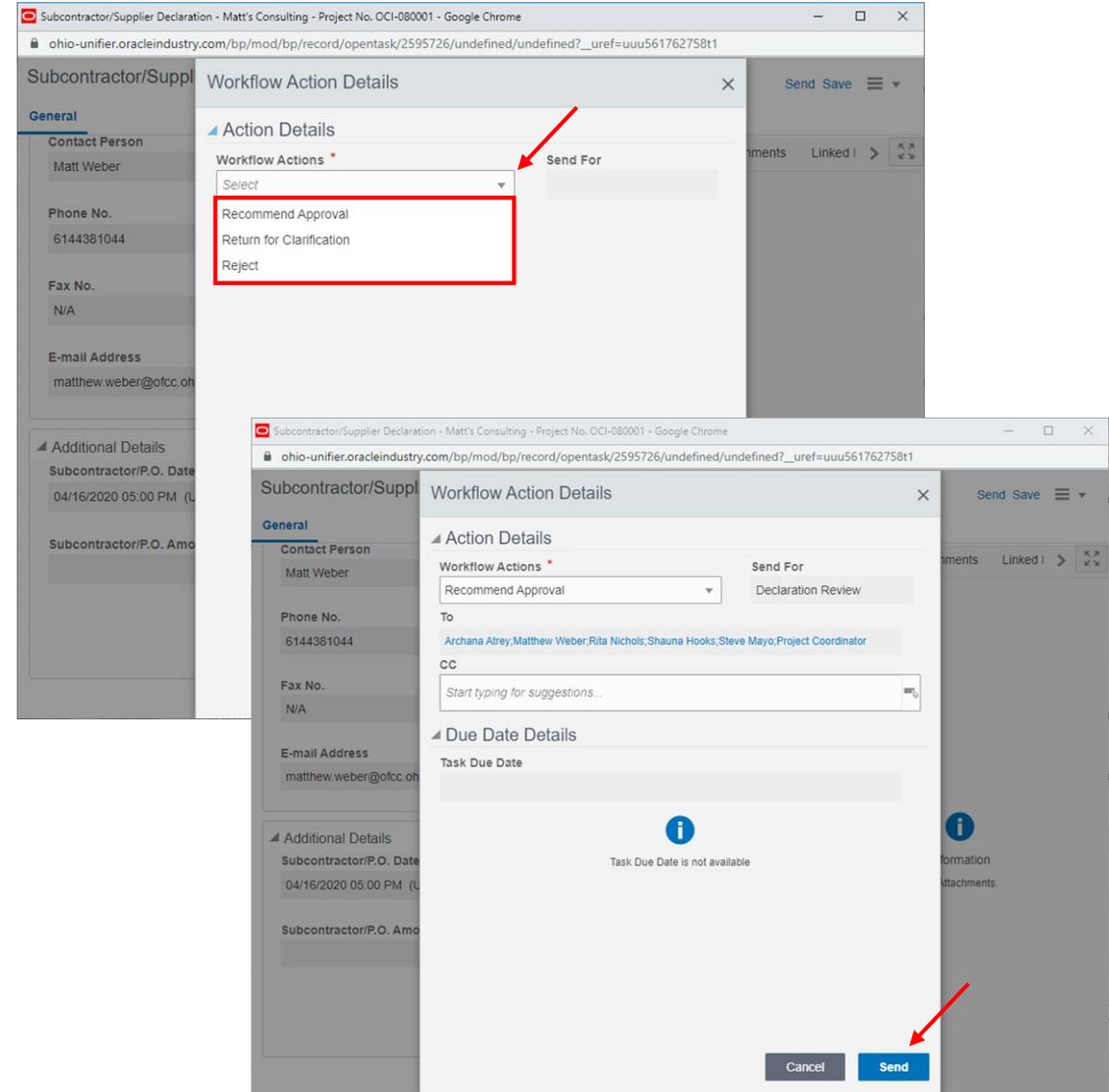
# PM Declaration Review

- a) Under the General tab, review information entered in the previous step, scrolling down as necessary
- b) Review any attachments
- c) Once the review is complete and the record is ready to move forward, click **Send**



# Send Record

- ▶ Select the Workflow Action
  - ▶ If record is ready to move forward to the Project Coordinator for Declaration Review (Validation):
    - ▶ Choose **Recommend Approval**
    - ▶ Click **Send**
  - ▶ If record must be returned to the Associate for more information:
    - ▶ Add a General Comment. See [Add General Comments](#) section for instructions.
    - ▶ Choose **Return for Clarification**
    - ▶ Click **Send**



# **Subcontractor/Supplier Declaration Review Validation (PC)**



# Subcontractor/Supplier Declaration Review Validation (PC)

- ▶ PC receives an Email
- ▶ Click on the “Unifier Login” button to access the task

This is a system-generated e-mail message. Do not reply to sender.

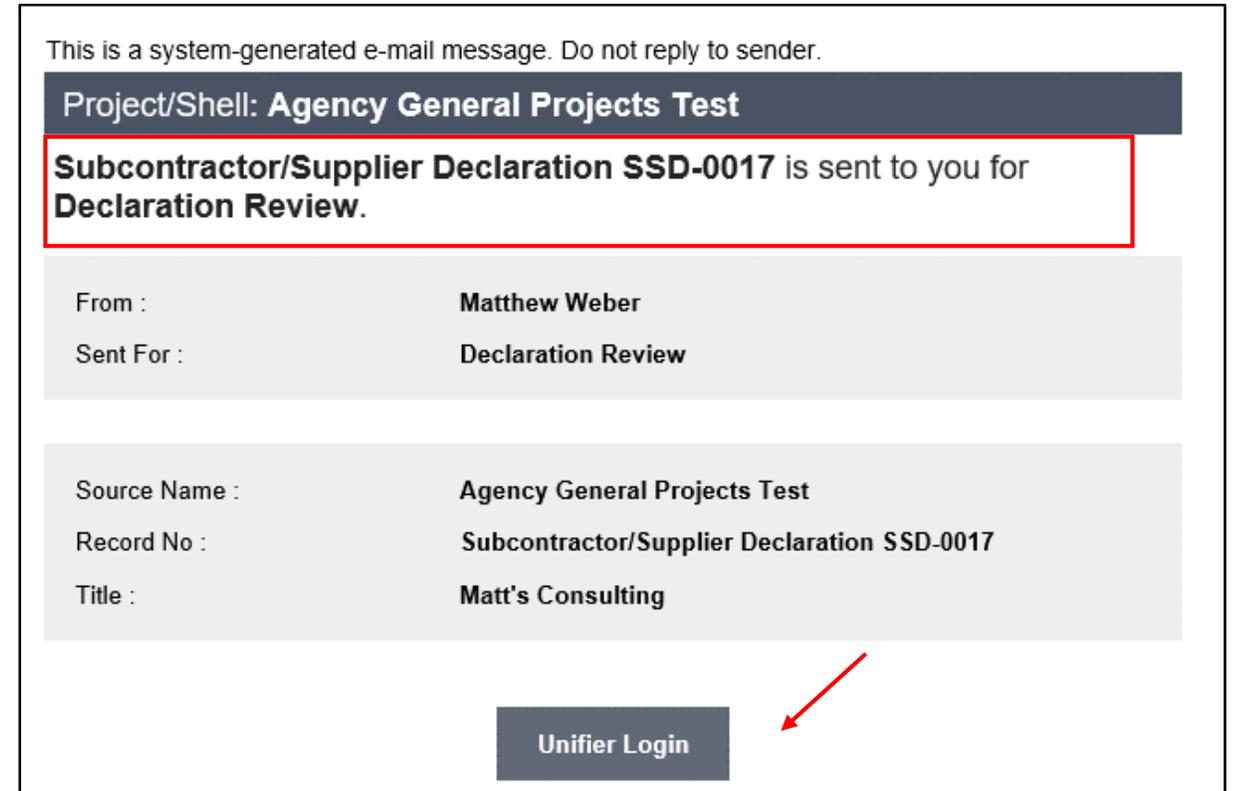
**Project/Shell: Agency General Projects Test**

**Subcontractor/Supplier Declaration SSD-0017 is sent to you for Declaration Review.**

From : Matthew Weber  
Sent For : Declaration Review

Source Name : Agency General Projects Test  
Record No : Subcontractor/Supplier Declaration SSD-0017  
Title : Matt's Consulting

[Unifier Login](#)



# Declaration Review Validation (PC) – Accept Task

- ▶ Click **Accept Task** to begin work on the record

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

- Browser Tab: Subcontractor/Supplier Declaration - Matt's Consulting - Project No. OCI-080001 - Google Chrome
- URL: ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2595854?task\_id=2595854&parent\_id=0&viewOnly=0&project\_id=1003&model=usd&\_uref=uuu561...
- Page Title: Subcontractor/Supplier Declaration
- Buttons: Accept Task (circled in red with an arrow), Decline, and a menu icon.
- Section: General
- Task Details:
  - From: Matthew Weber
  - To: Archana Atrey; Matthew Weber; Rita Nichols; Shauna Hooks; Steve Mayo; Project Coordinator
  - Sent For: Declaration Review
- General Information:

Organization	OAKS CI Test	Record Number	SSD-0021
Project Number	OCI-080001	Creation Date	04/16/2020 09:18 AM (UTC-5)
Project Name	Agency General Projects Test	Creator	Matthew Weber
- Attachments: Information icon, No Attachments.



# Declaration Review Validation (PC)

- a) PC will review the record, and fill out all required fields in the General section
- b) Scroll down to review and complete all sections in the General section

Subcontractor/Supplier Declaration - Matt's Consulting - Project No. OCI-080001 - Google Chro...

ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2595854/undefined/undefined?\_uref...

Subcontractor/Supplier Declaration Send Save

**General**

**General**

<b>Organization</b> OAKS CI Test	<b>Record Number</b> SSD-0021
<b>Project Number</b> OCI-080001	<b>Creation Date</b> 04/16/2020 09:18 AM (UTC-5)
<b>Project Name</b> Agency General Projects Test	<b>Creator</b> Matthew Weber
<b>Project Location</b> OAKS CI Administration	<b>Status</b> Pending
<b>Title</b> Matt's Consulting	
<b>Contract Name</b>	<b>Contractor Name</b>
<b>Professional Services Agreement Name *</b> mmw-test new workflow	



# Declaration Review Validation (PC)

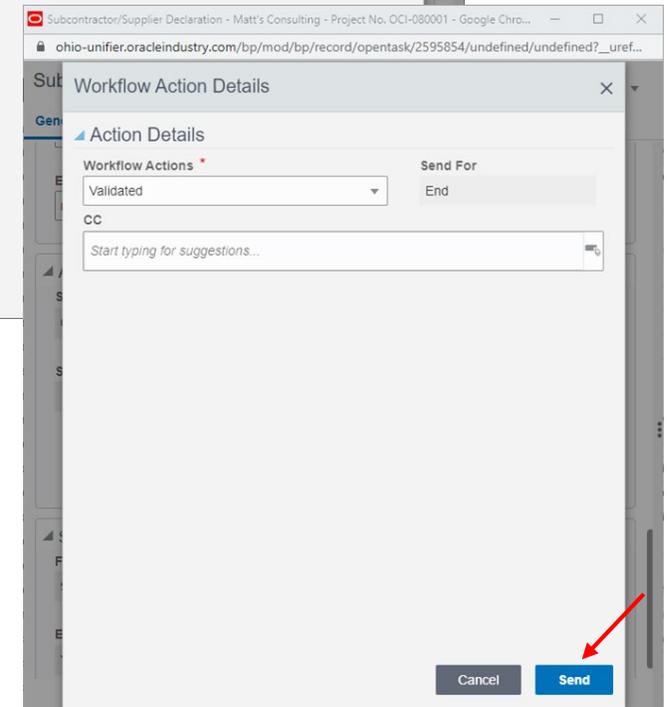
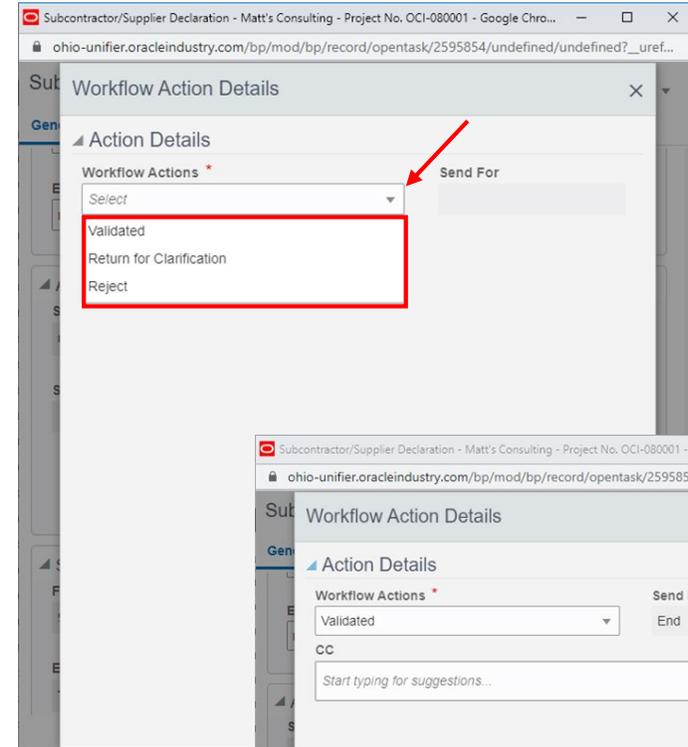
- c) Once all required fields are completed and the record is ready to move forward, click **Send**
  - ▶ Utilize the links [found here](#) to validate EDGE and DFWP

The screenshot displays a web browser window with the URL `ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2595854/undefined/undefined?_uref...`. The page title is "Subcontractor/Supplier Declaration". In the top right corner, there are "Send" and "Save" buttons, with "Send" circled in red. A blue circle with the letter "C" and a red arrow points to the "Send" button. The form is divided into sections: "General" (E-mail Address: matthew.weber@ofcc.ohio.gov), "Additional Details" (Subcontractor/P.O. Date: 04/16/2020 05:00 PM (UTC-5), EDGE Certified?: Yes, Subcontractor/P.O. Amount \$: 25,000.00, EDGE Certification Number: 123456789, MBE: Select), and "Subcontractor Supplier Validation" (Federal Tax ID: 99-9999999, EDGE Certified?: Yes, Validated? \*: Yes, Validated? \*: Yes). The "Validated? \*" dropdown menus are highlighted with a red box.



# Send Record

- ▶ Select the Workflow Action
  - ▶ If the record is ready to be validated, completing the process:
    - ▶ Choose **Validated**
    - ▶ Click **Send**
  - ▶ If record must be returned to the Associate for Update :
    - ▶ Add a General Comment  
(See [Add General Comments](#) section for instructions)
    - ▶ Choose **Return for Clarification**
    - ▶ Click **Send**



# Validation Links

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:

- ▶ <http://eodreporting.oit.ohio.gov/searchEODReporting.aspx>



# Questions?

Please contact OAKS CI Support Desk:

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

614.644.2211

