

# 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

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 user ID "uuu600419530". The page header includes a navigation menu with items like "Company Work...", "ACF Fire Protec...", "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. A search bar is located below the header, containing the text "DPS-". A red arrow labeled "b" points to the search bar. Below the search bar is a table with the following data:

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

A red arrow labeled "c" points to the first row of the table. Below the table, there is a section titled "veral Projects Test" and "r Agency General Projects". At the bottom of the page, there is a footer with the text "s Dollar (USD)" and "\_prod+1003@oracleindustry.com".



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

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

The screenshot displays the Oracle Primavera Unifier interface. The top navigation bar shows 'Company Work...', 'Agency', and 'Agency General...'. A sidebar menu on the left lists various document types, with 'Subcontractor/Supplier Declaration' highlighted at the bottom. A red arrow points to this menu item. The main content area shows a table titled 'Subcontractor/Supplier Declaration' with columns for 'Subcontractor/Supplier' and 'Type'. A '+ Create' button is circled in red in the top right of the main area. The table contains 15 records, including entries like 'Bob's Concrete', 'brown', 'EDGE Contracting Services', 'For Sonya', 'Jeremy's Consulting', 'Mike's Plumbing', and 'XYZ Construction'.

Subcontractor/Supplier	Type
Bob's Concrete	Subcontract
Bob's Concrete	Subcontract
Bob's Concrete	Subcontract
Bob's Concrete	Material Sup
Bob's Concrete	Subcontract
Bob's Concrete	Consultant
brown	Material Sup
EDGE Contracting Services	Subcontract
For Sonya	Subcontract
Jeremy's Consulting	Consultant
Mike's Plumbing	Subcontract
x	Subcontract
XYZ Construction	Consultant



# 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" section is selected and highlighted with a red circle. A blue circle with the letter "a" and a red arrow points to this section. The "Title" field is highlighted with a red box and contains the text "Matt's Consulting". The "Tier 1" dropdown is set to "Yes". The "Contract Name" and "Contractor Name" fields are empty. The "Professional Services Agreement Name" field is also empty. The right sidebar shows "Attachments" with "No Attachments" and "Information".

Organization	Record Number
OAKS CI Test	
Project Number	Creation Date
OCI-080001	
Project Name	Creator
Agency General Projects Test	Matthew Weber
Project Location	Status
OAKS CI Administration	
Title *	Tier 1
Matt's Consulting	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

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

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

City \*  
Columbus

State \*  
Ohio

ZIP \*  
43215

Contact Person \*  
Matt Weber

Phone No. \*  
6144381044

Fax No. \*  
N/A

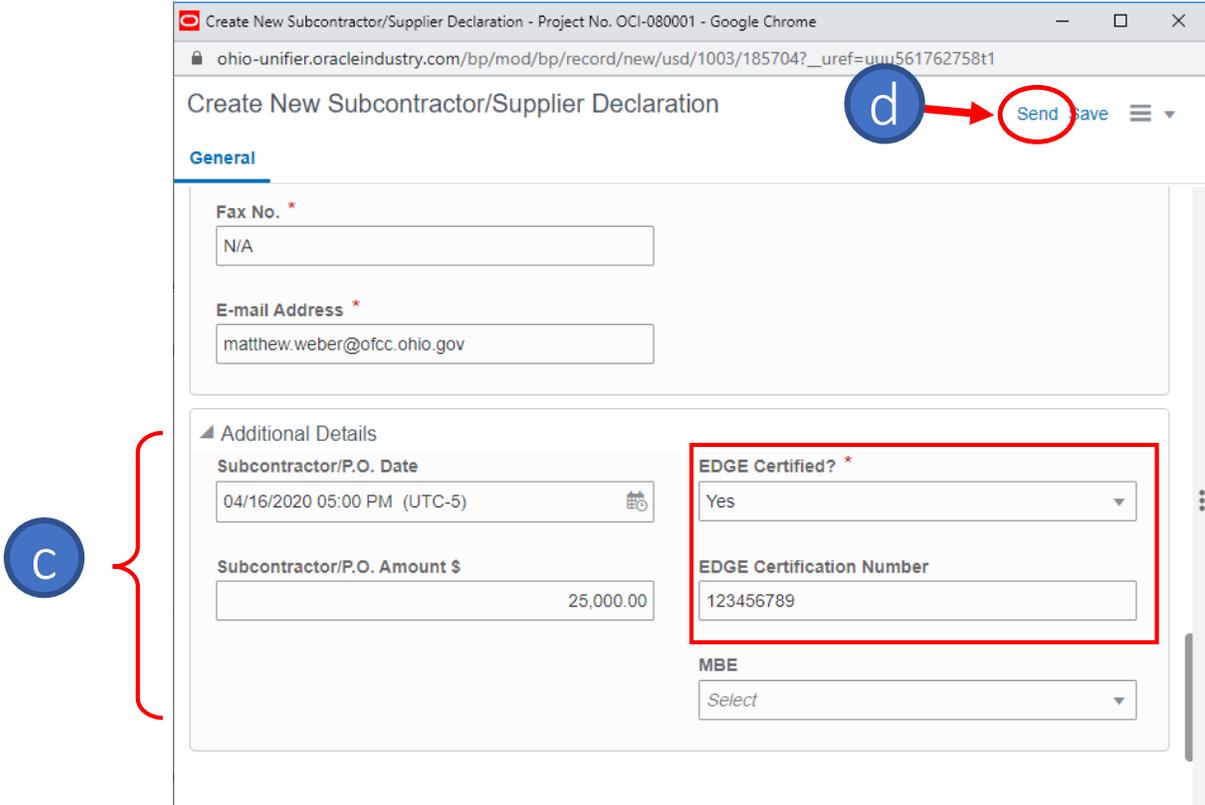
E-mail Address \*  
matthew.weber@ofcc.ohio.gov

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**



# 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*

The screenshot shows a web browser window titled "Create New Subcontractor/Supplier Declaration - Project No. OCI-080001 - Google Chrome". The URL is "ohio-unifier.oracleindustry.com/bp/mod/bp/record/new/usd/1003/185704?\_\_uref=uuu561762758t1". The main content area is a "Create New" form with a "Workflow Action Details" dialog box open. The dialog box has a "General" tab and contains the following fields:

- Action Details**
  - Workflow Actions \***: A dropdown menu with "Submit" selected.
  - Send For**: A button labeled "PM Declaration Review".
  - To**: A text field containing "Archana Atrey;Matthew Weber;Rita Nichols;Shauna Hooks;Steve Mayo;Project Manager".
  - CC**: A text field with the placeholder "Start typing for suggestions..." and a search icon.
- Due Date Details**
  - Task Due Date**: A text field that is currently empty.

At the bottom of the dialog box, there is an information icon (i) and the text "Task Due Date is not available". Below the dialog box, there are "Cancel" and "Send" buttons.

# **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 includes fields for "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 a message: "Information No Attachments." with an information icon.



# 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**

The screenshot shows the Oracle PM Declaration Review interface. The browser title is "Subcontractor/Supplier Declaration - Matt's Consulting - Project No. OCI-080001 - Google Chrome". The URL is "ohio-unifier.oracleindustry.com/bp/mod/bp/record/opentask/2595726/undefined/undefined?\_\_uref=uuu561762758t1". The page title is "Subcontractor/Supplier Declaration". The "General" tab is selected. The "Attachments" tab is highlighted with a red box and labeled 'b'. The "Send" button is circled in red and labeled 'c'. A red bracket labeled 'a' encompasses the entire form area. The form contains the following information:

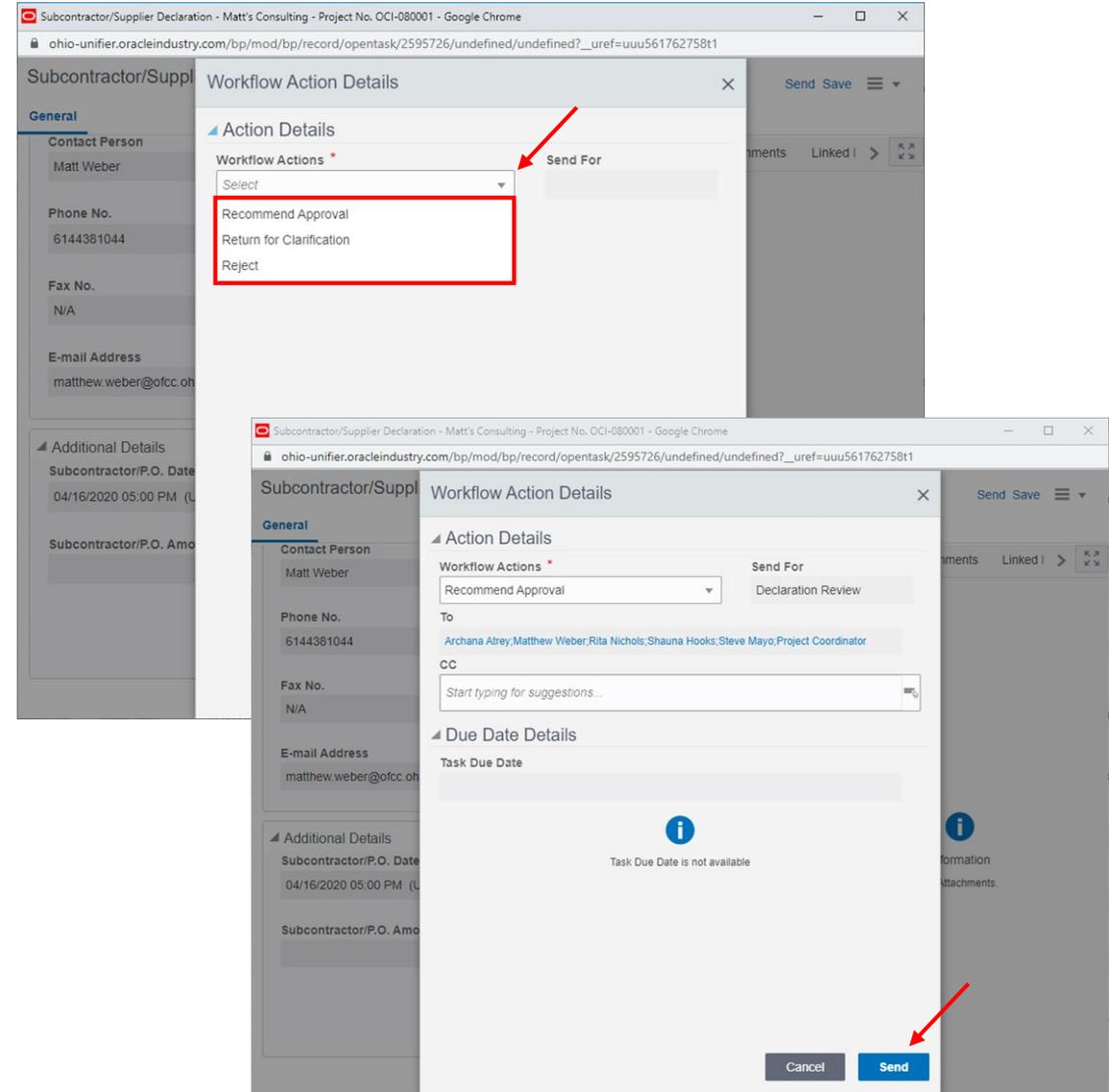
General	
Organization	Record Number
OAKS CI Test	SSD-0021
Project Number	Creation Date
OCI-080001	04/16/2020 09:18 AM (UTC-5)
Project Name	Creator
Agency General Projects Test	Matthew Weber
Project Location	Status
OAKS CI Administration	Pending
Title	
Matt's Consulting	
Contract Name	Contractor Name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

The right sidebar shows the "Attachments" tab with a red box around it, labeled 'b'. Below it, there is an "Information" icon and the text "No Attachments." The "Send" button is circled in red, labeled 'c'. A red bracket labeled 'a' encompasses the entire form area.



# 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 displays 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
- Navigation:** A red arrow points to the 'Accept Task' button, which is circled in red. Other navigation options include 'Decline' and a menu icon.
- General Tab:** The 'General' tab is active, showing the following information:
  - Task Details:**
    - From:** Matthew Weber
    - To:** Archana Atrey;Matthew Weber;Rita Nichols;Shauna Hooks;Steve Mayo;Project Coordinator
    - Sent For:** Declaration Review
  - General:**

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:** The 'Attachments' tab is selected, showing an information icon and the text 'Information 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)

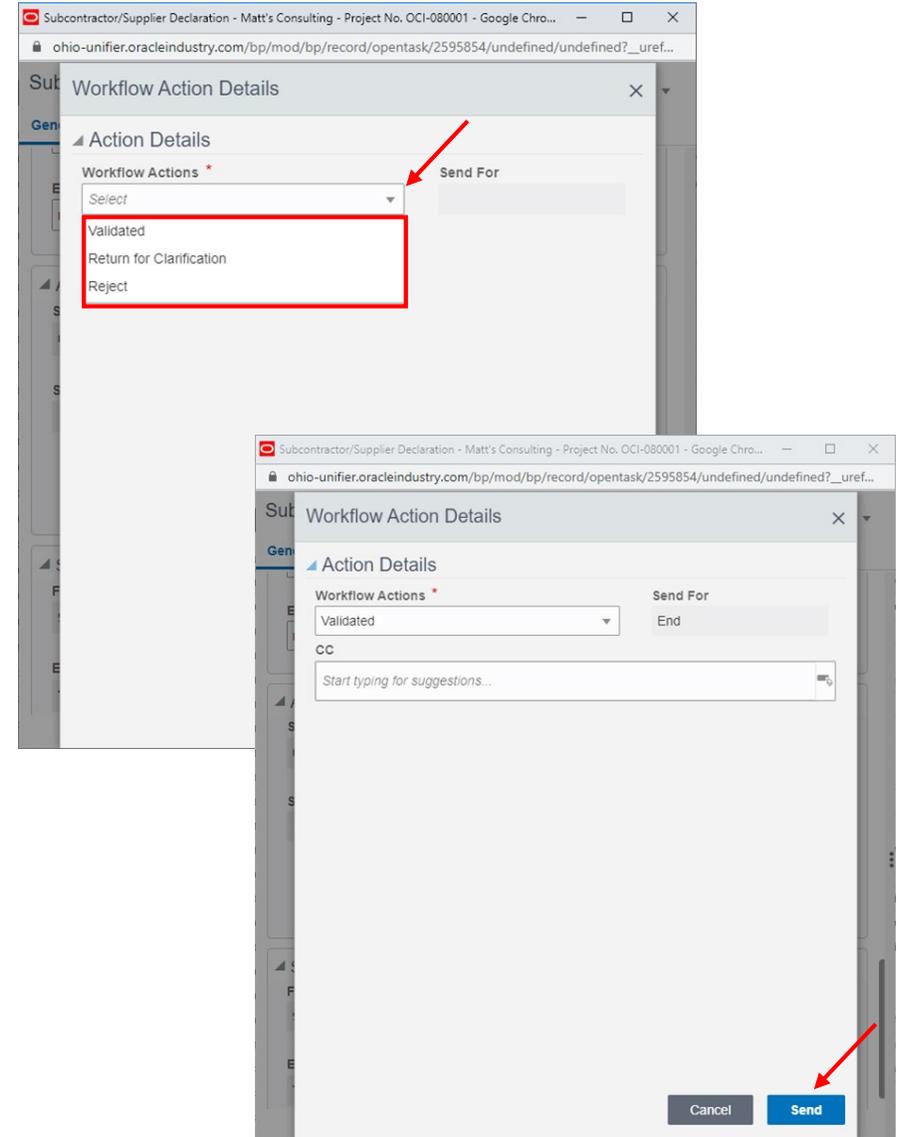
- c) Once all required fields are completed and the record is ready to move forward, click **Send**
  - ▶ Utilize the links [found here](#) to validate EDGE and DFWP

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" is positioned above the "Send" button, with a red arrow pointing to it. 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), Subcontractor/P.O. Amount \$: 25,000.00, EDGE Certified?: Yes, EDGE Certification Number: 123456789, MBE: Select), and "Subcontractor Supplier Validation" (Federal Tax ID: 99-9999999, EDGE Certified?: Yes). The "Validated? \*" dropdowns in the validation section are highlighted with a red box, both showing "Yes".



# 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

