



OFFICE OF THE UNIVERSITY ARCHITECT

SUBCONTRACTOR/SUPPLIER DECLARATION PROCEDURE IN OAKSCI

The Prime Contractor must declare each of the subcontractors and material suppliers within 10 business days of the Notice to Proceed.

All Subcontractor/Supplier Declarations must be approved and have a Complete status before a Schedule of Values can be submitted.

Step One: Scan & Upload Documents needed for Subcontractor/Supplier Declaration.

- Required documents for Subcontractors:
 - State of Ohio Subcontract Agreement Form with all exhibits (Tier 1 only)
 - OBWC Certificate
 - Payroll Schedule
 - Ohio BWC-approved Drug Free Workplace Program (also known as DFWP)
 - Proof of license for plumbing, electrical, hydronics, refrigeration, heating, ventilating, and air conditioning
 - Current W-9
 - Any subcontractor amount in excess of \$200K must submit outline of qualifications and experience of PM, and superintendent, including references
 - EDGE Affidavit Form, the form in your bid (provided by Kent State University)
 - If they are EDGE certified, upload Equal Opportunity Department issued EDGE certificate
- Required documents for Materials Suppliers:
 - If they are EDGE certified, upload Equal Opportunity Department issued EDGE certificate
 - EDGE Affidavit Form (provided by Kent State University)
 - Current W-9

Step Two: Go to Logs – Subcontractor/Supplier Declaration and pick Create.

- You will need to complete one of these applications for EACH subcontractor and material supplier.

NOTE: If your subcontractor or material supplier is using a subcontractor or material supplier, you must also claim them on your list.

Subcontractor/Supplier Declaration

Click on the Create button to enter a declaration for each subcontractor & supplier who will be on the project. Includes subs of subs, etc.

	Subcontractor/Supplier	Type	Contractor Name	Status	Subcontractor... Amount \$	Edge Certifie...	MBE	DFWP?	Record No.
	A1 Tree	Subcontractor	Joe General Contractor	Complete	1,000.00	Yes		Yes	SSD-0002

Step Three: Fill in the General Form section.

- In the Title section, enter the full company name of the subcontractor or material supplier.
- At the Contract Name, click on the little black rectangle and choose the name of your company/contract.

General

NOTE: Only select either Contract Name or Professional Services Agreement Name.
Tier1 Subcontractor Documentation must be attached as soon as it is available.

Organization <input type="text" value="Kent State University"/>	Record Number <input type="text"/>
Project Number <input type="text" value="KSU-130001"/>	Creation Date <input type="text"/>
Project Name <input type="text" value="Kent State University Training 2"/>	Creator <input type="text" value="Cindy Pizzuto"/>
Project Location <input type="text" value="KSU"/>	Status <input type="text"/>
Title * <input type="text"/>	<div>Enter the full name of the subcontractor or material supplier's company</div>
Contract Name * <input type="text" value="Type a Title..."/>	
	Contractor Name <input type="text"/>

Step Four: Completely fill in the Declaration Information section.

- Hit the arrow at Type, and choose if it is a material supplier, subcontractor or consultant.

Declaration Information

Type *

Tier 1 *

Subcontractor/Supplier *

Subcontracted by:

Federal Tax ID *

Primary Officer 1 *

Address Line 1 *

Address Line 2

City *

State *

ZIP *

If not a Tier 1 sub or supplier, mark as No and the type in the company who hired this sub or supplier.

Fill in all of the information in this section. No line can be skipped.

Contact Person *

Phone No. *

Fax No. *

E-mail Address *

- If this is NOT a Tier 1 subcontractor, then from the drop down, pick NO.
- Type in the name of the contractor who hired this subcontractor or supplier. Do this for all Tier 2, 3, etc. subcontractors and suppliers.

Step Five: Fill in the Additional Details section.

- Again, **ALL lines with red asterisks MUST be filled in.** Plus the Subcontractor PO date needs to be filled in.
- The subcontractor/supplier amount must be equal or greater to what you declared in your bid, especially if they are being claimed as EDGE.

Additional Details

Subcontractor/P.O. Date

MM/DD/YYYY HH:MM AM

Subcontractor/P.O. Amount \$

0.00

Services/Material Brands

Skilled Trade License No.

PO date is also required.

DFSP Enrolled

Select

EDGE Certified?

Select

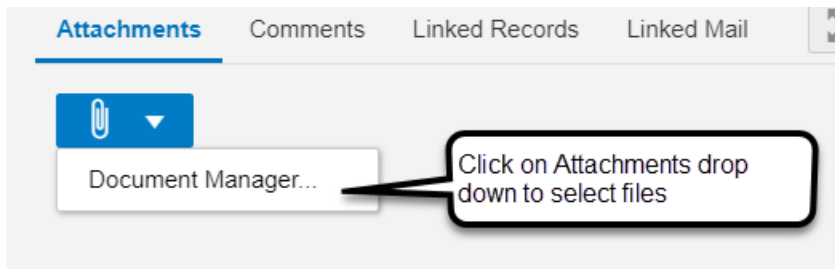
EDGE Certification Number

MBE

Select

Step Six: Upload and attach all required supporting documents to the record.

- State of Ohio Subcontract Agreement (Tier 1 subcontractors only)
- Workers' Compensation Certificate
- Any exhibits that may have been attached to the subcontractor agreement form
- Completed Payroll Schedule Form
- Ohio BWC-approved Drug Free Workplace Program (also known as DFWP)
- Proof of License, if applicable
- Current W-9
- EDGE Affidavit Form, the form in your bid (provided by Kent State University)
- If they are EDGE certified, upload Equal Opportunity Department issued EDGE certificate



Step Seven: Workflow Action is Send and then Workflow Actions is Submit. Click the Send button.

The screenshot shows the 'Action Details' section of a software interface. It includes a 'Workflow Actions' dropdown menu set to 'Submit', a 'Send For' field set to 'Associate Declaration Review', a 'To' field with a list of names, and a 'CC' field with a placeholder text 'Start typing for suggestions...'. Below this is the 'Due Date Details' section, showing a 'Task Due Date' of '05/23/2021 04:08 PM'. At the bottom right, there are two buttons: 'Cancel' and 'Send'. A callout box points to the 'Send' button, containing the text: 'Click the Send button.'.

- It will go to the Associate for Associate Declaration Review.

NOTE: Once it goes to Associate for review, they have TWO business days to check for completeness and compliance with the contract documents.

Step Eight: Associate will Accept the task.

- Reviews the information, making sure that all documentation is attached and all line items are filled in completely.
- If required information is missing or incomplete, the Associate will Return for Clarification back to the Contractor.

Step Nine: If all information is acceptable by the Associate, Workflow Action is Recommend Approval, then Send.

- The information will go to the Project Manager for Declaration Approval.

NOTE: The Project Manager has THREE business days to check for completeness and compliance with Contract Documents.

Step Ten: Project Manager will Accept the task.

- Reviews the information and verifies all documentation is attached and all lines are completely filled in.

Step Eleven: If all information is acceptable by the Project Manager, Workflow Action is Recommend Approval, then Send.

- It will go to the Prevailing Wage Coordinator for Declaration Validation.

NOTE: The Prevailing Wage Coordinator has THREE business days to check for completeness and compliance with Contract Documents.

Step Twelve: The Prevailing Wage Coordinator will Accept the Task.

- The Prevailing Wage Coordinator will validate the Subcontractor/Supplier Drug Free Workplace Environment enrollment, and EDGE status.

Step Thirteen: If all information is acceptable by the Prevailing Wage Coordinator, Workflow Action is Validated, then Send.

- This will send the record to End and show as complete.

Once all Subcontractors/Suppliers have been sent to Complete, the contractor can create his Schedule of Values.