

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)
 - o OBWC Certificate
 - o 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
 - 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)
 - o 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.

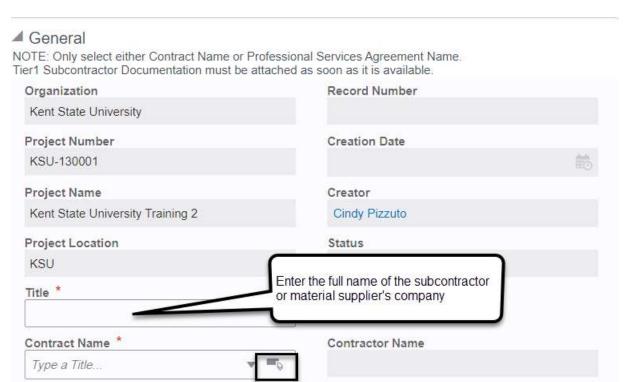
NOTE: If your subcontractor or material supplier is using a subcontractor or material supplier, you must also claim them on your list.

Subcontractor/Supplier Declaration



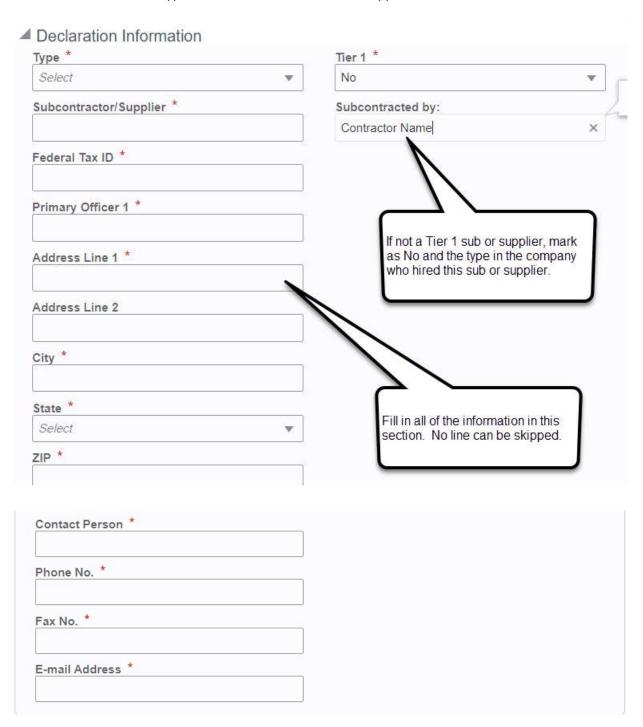
Step Three: Fill in the General Form section.

- 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.



Step Four: Completely fill in the Declaration Information section.

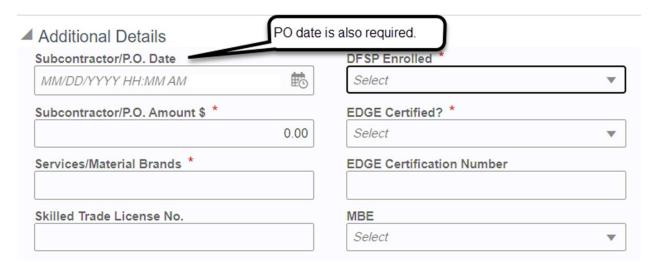
➤ Hit the arrow at Type, and choose if it is a material supplier, subcontractor or consultant.



- 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.



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.



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 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.