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.
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.

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

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

PO date is also required.

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 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.