UNIVERSITY OF DELAWARE EXCHANGE

Completing the Subaward Form & Subaward Change Requests

Last Updated 7/26/2023

UNIVERSITY OF DELAWARE

Subaward Request

- Complete the Subaward form if you need a purchase order for a Subaward; this form cannot be used for purchasing goods or services.

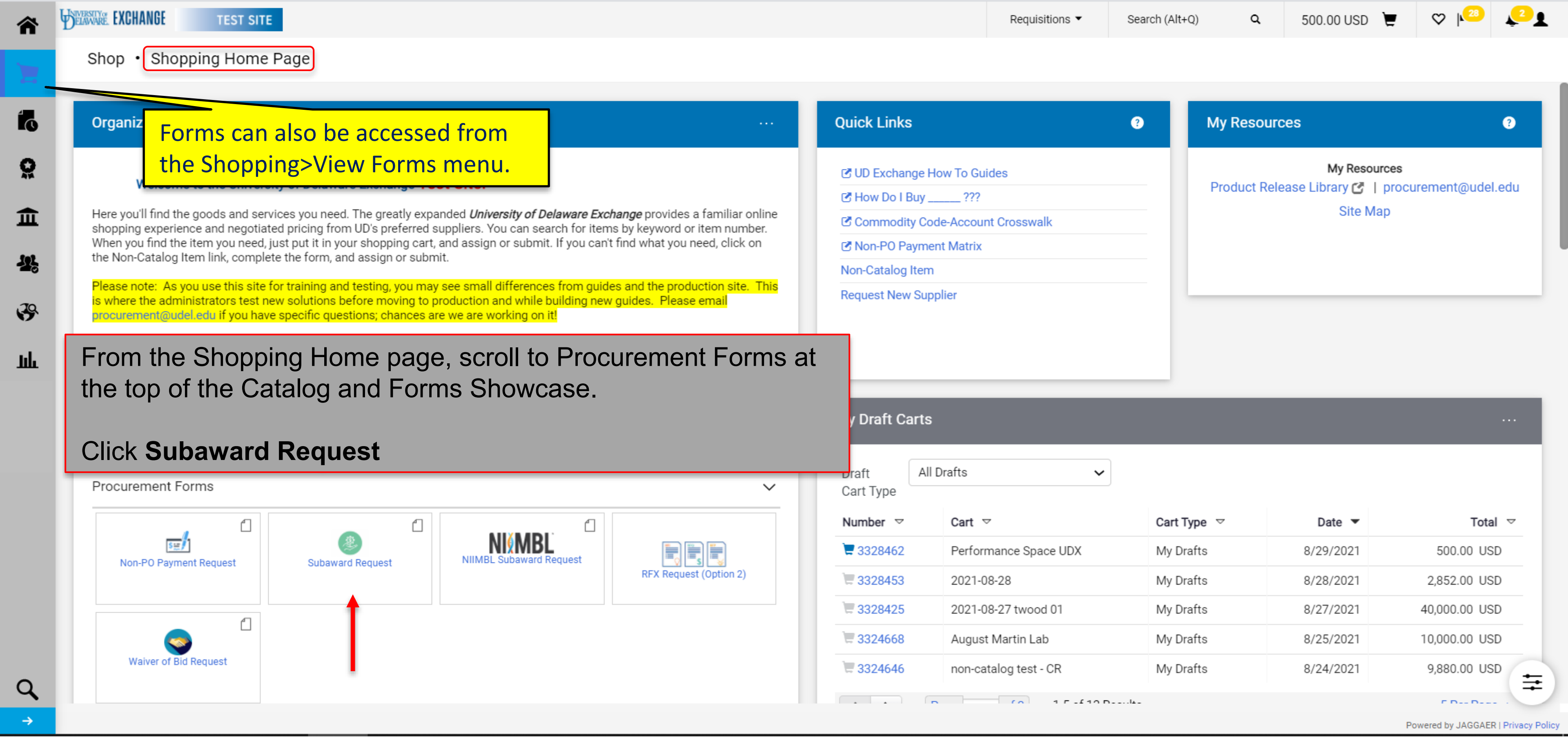
- Subaward Definition: Subawards are awards provided by a pass-through entity to a subrecipient for the subrecipient to carry out part of a Federal award received by the pass-through entity. It does not include payments to a contractor or payments to an individual that is a beneficiary of a Federal program. A subaward may be provided through any form of legal agreement, including an agreement that the pass-through entity considers a contract.

This guide will illustrate:

Forms can also be accessed from the Shopping>View Forms menu.

From the Shopping Home page, scroll to Procurement Forms at the top of the Catalog and Forms Showcase.

Click **Subaward Request**



UD EXCHANGE TEST SITE

All | Search (Alt+Q) | 23,000.00 USD

Shop ▸ Shopping ▸ View Forms

‹ Back to Shopping Home

Subaward Request

Form Number	**623183**
Purpose	**Procurement Request**
Status	**Incomplete**

Instructions

- Suppliers
- Attachments
- Form Fields
- Review and Submit

Instructions

Request Actions | History | ?

Complete this form if you need to issue a NEW Purchase Order for a Subaward; this form is NOT to be used for purchasing goods or services or extending legacy webform subawards.

Subaward Definition: Subawards are awards provided by a pass-through entity to a subrecipient for the subrecipient to carry out part of a Federal award received by the pass-through entity. It does not include payments to a contractor or payments to an individual that is a beneficiary of a Federal program. A subaward may be provided through any form of legal agreement, including an agreement that the pass-through entity considers a contract. Click **here** for additional subaward details and reference the Subawards tile.

For extensions of subawards previously issued in webforms, please submit a **Purchase Order Amendment** webform to do so.

Required attachments to this form should include, but are not limited to, the following documents:

- Budget – revised if necessary due to award
- Statement of Work (SOW)
- Subrecipient Commitment Form (from proposal)
- Provider Category Determination Worksheet (from proposal)

Next ›

Read the Subaward Definition. If your project is being Federally funded and you have determined this purchase is a Subaward, click **Next.**

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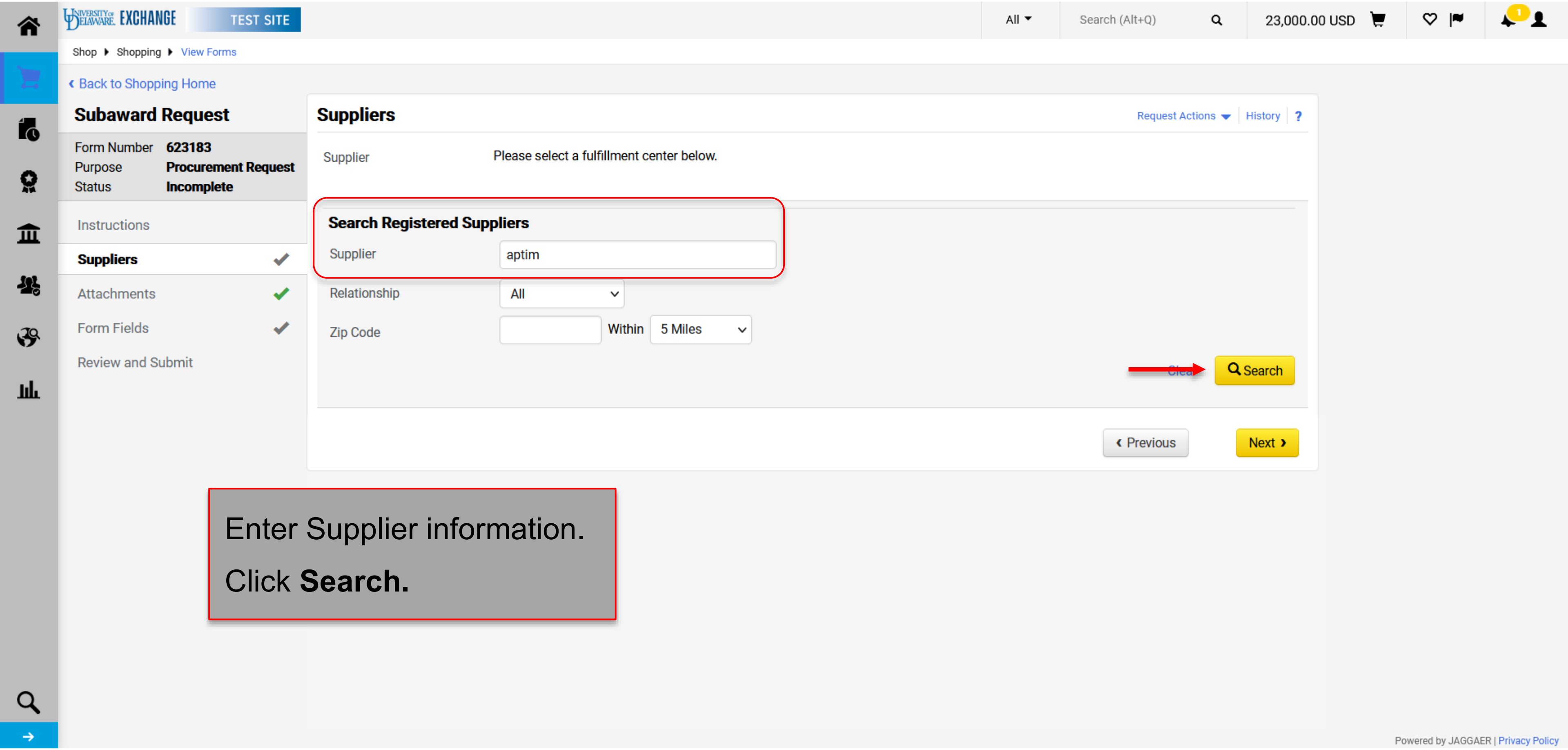
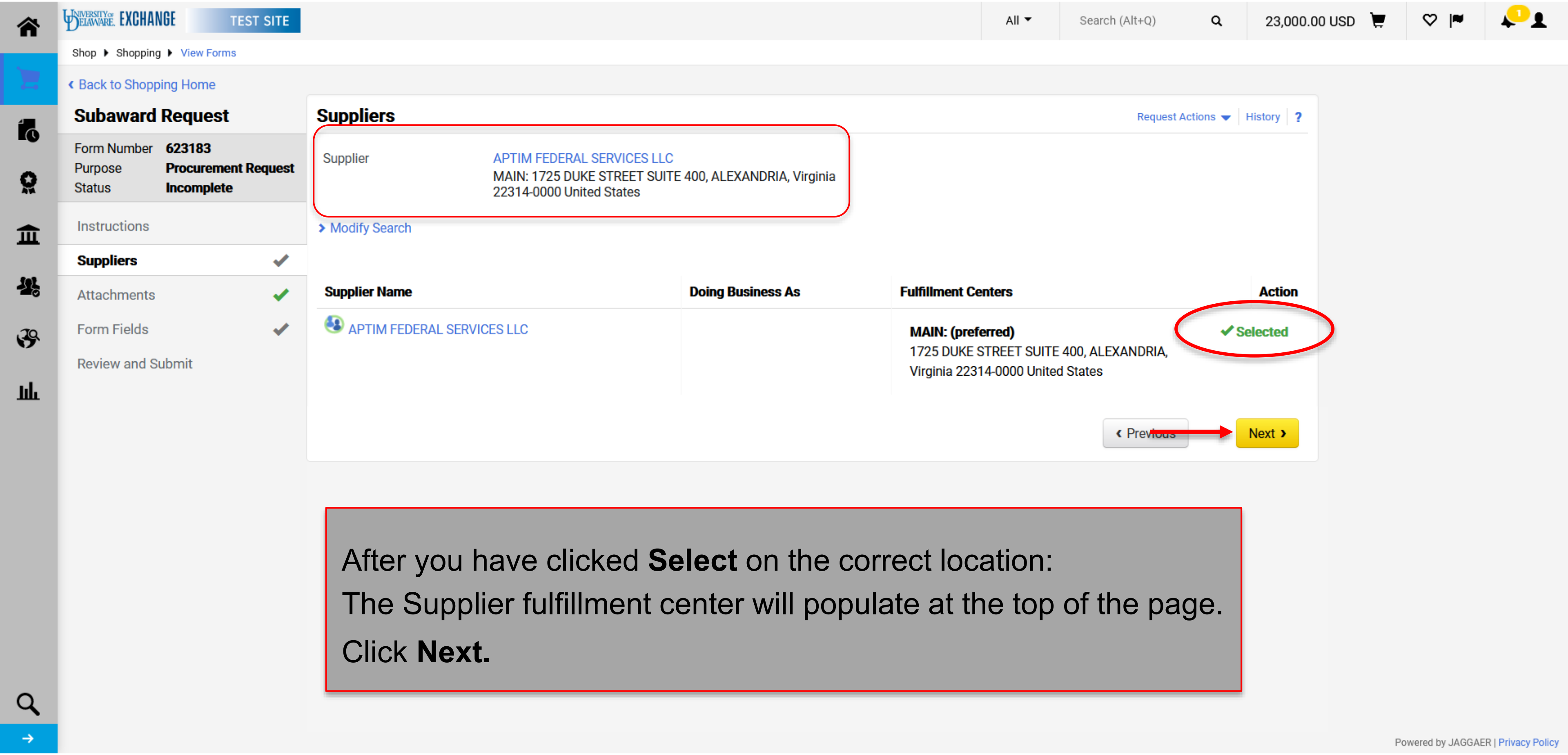


Enter Supplier information.

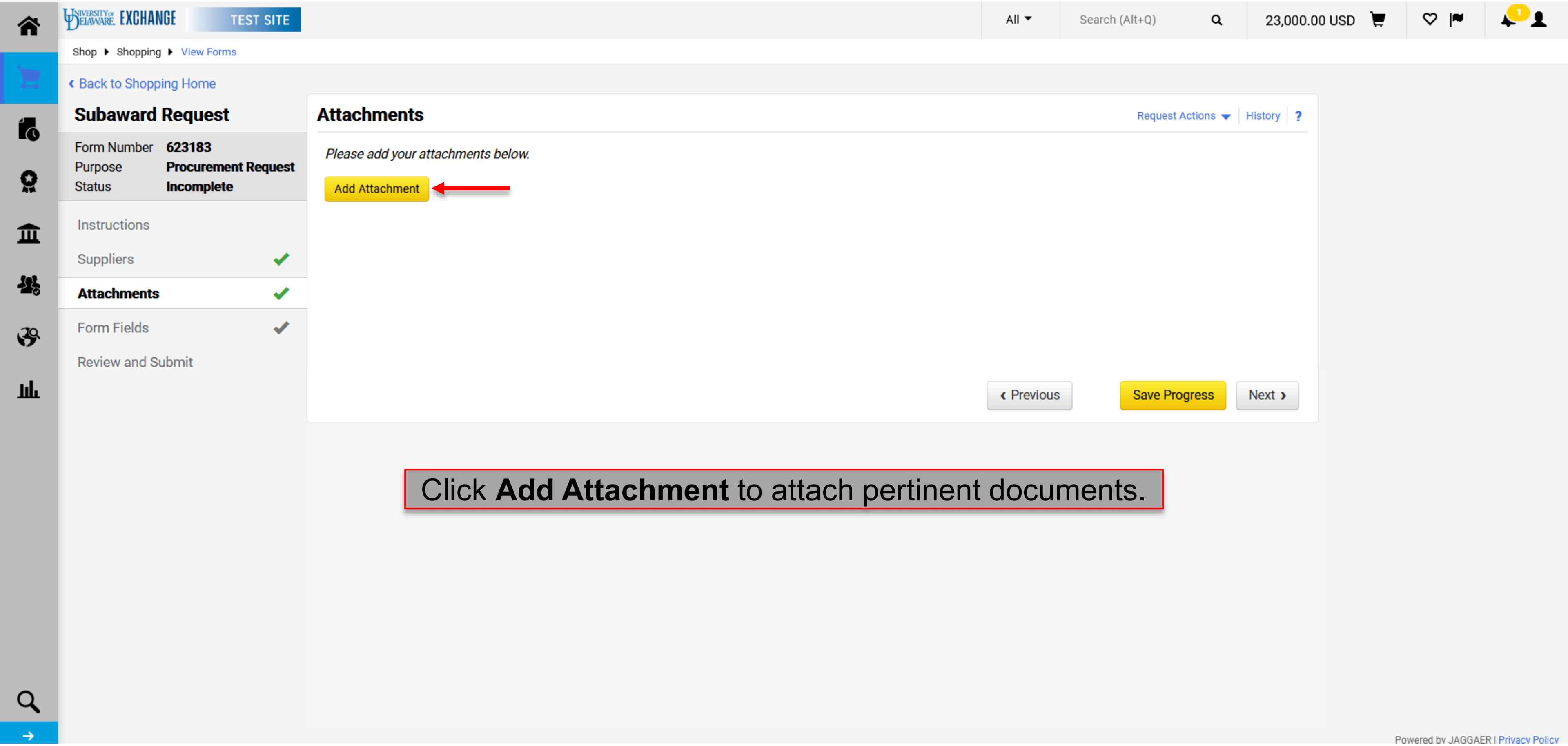
Click **Search.**



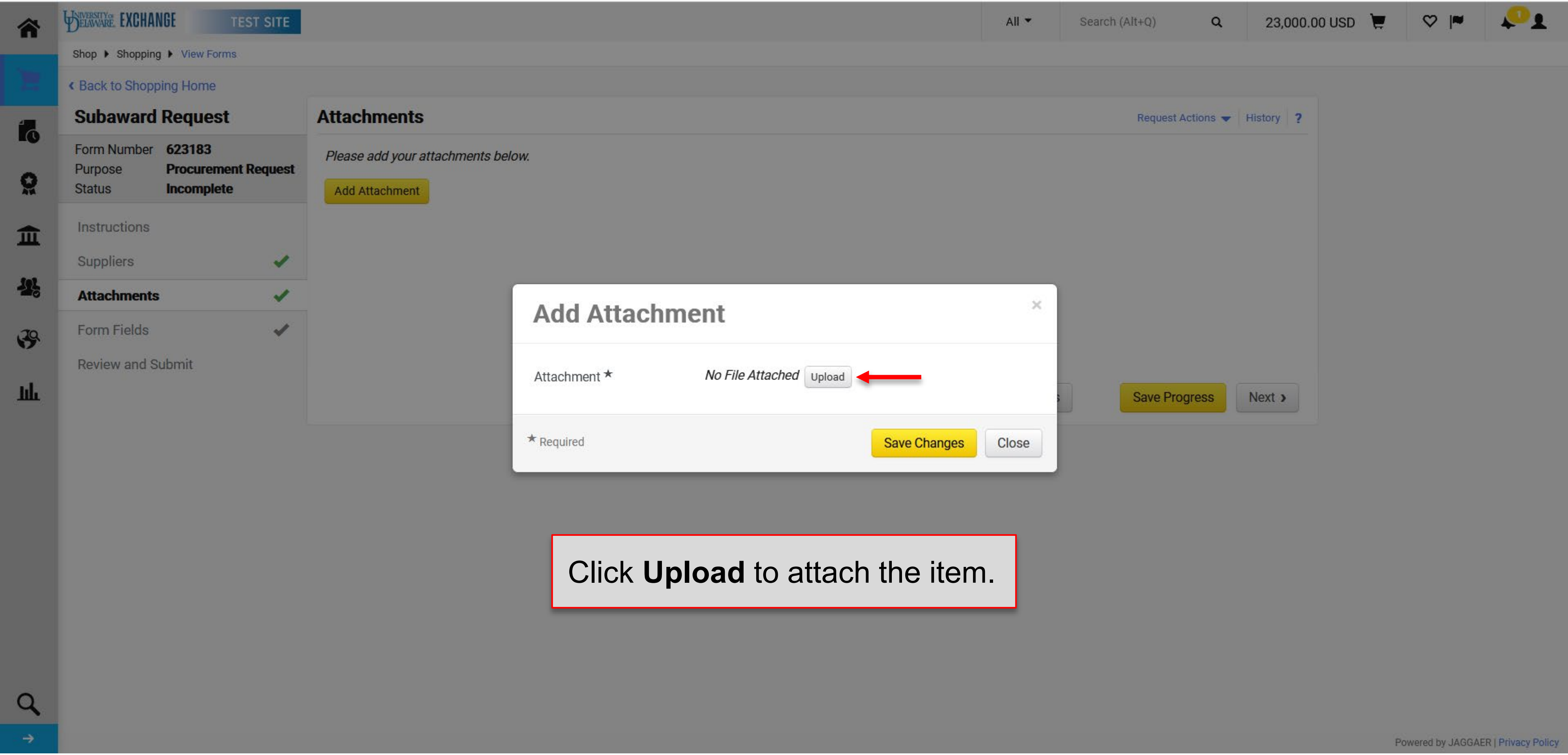
After you have clicked **Select** on the correct location:

The Supplier fulfillment center will populate at the top of the page.

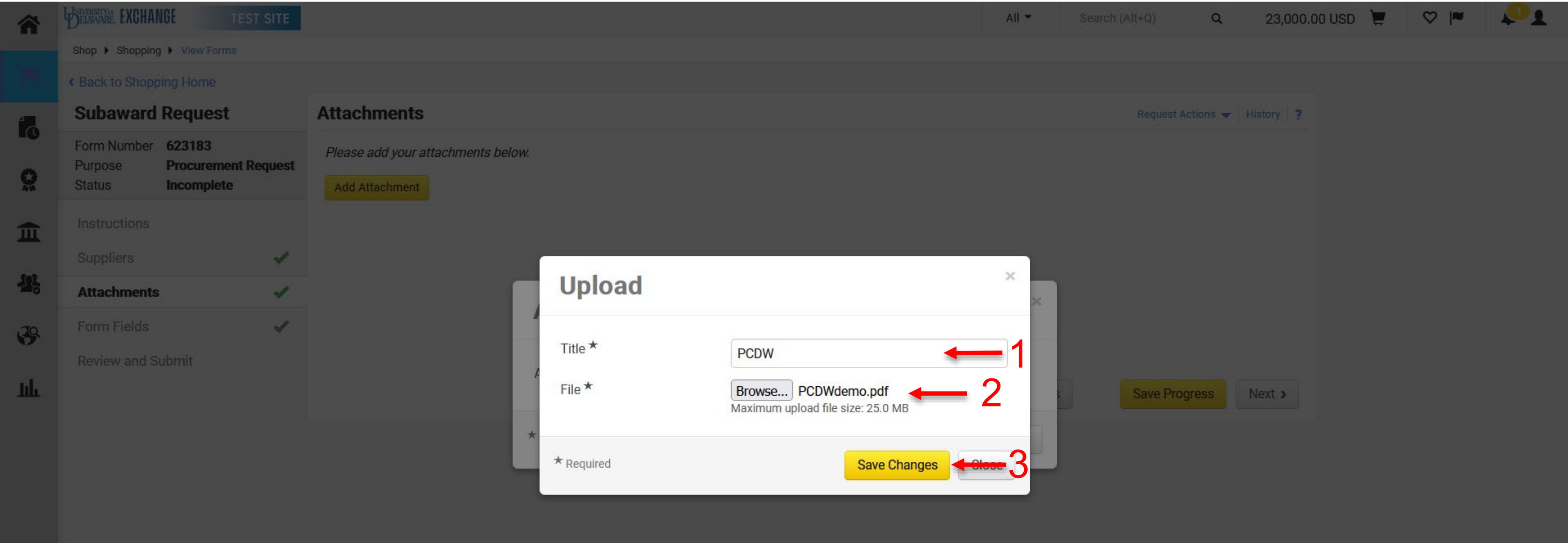
Click **Next.**



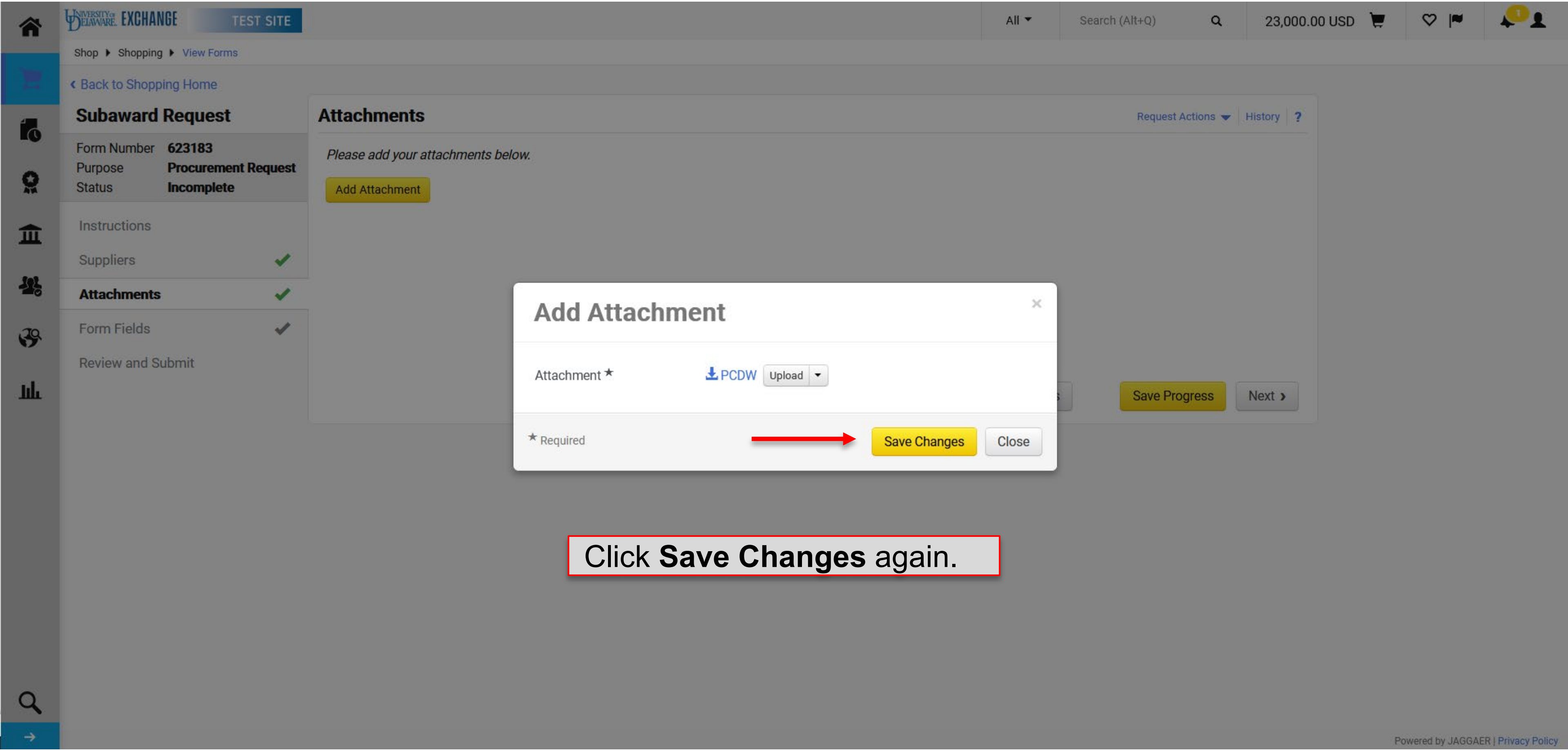
Click **Add Attachment** to attach pertinent documents.



Click **Upload** to attach the item.



1. Name your document
2. Click **Browse** and choose the item to upload from your files.
3. Click **Save Changes.**



Click **Save Changes** again.

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‹ Back to Shopping Home

Subaward Request

Form Number	**623183**
Purpose	**Procurement Request**
Status	**Incomplete**

- Instructions
- Suppliers ✔
- **Attachments** ✔
- Form Fields ✔
- Review and Submit

Attachments

Request Actions | History | ?

#	Attachment	
1	PCDW	Edit

Add Attachment

Repeat as needed for all documents.
Click **Next** when finished.

‹ Previous | Save Progress | Next ›

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Shop ▸ Shopping ▸ View Forms

‹ Back to Shopping H

Subaward Req

Form Number 6231
Purpose Proc
Status Inco

- Instructions
- Suppliers
- Attachments
- **Form Fields**
- Review and Submit

- Type in the name of the **Department Grant Administrator**.
- Please note that you will copy and paste the template verbiage on this page to complete the subaward line item description fields on the form.
  - The text in bold font should be modified with the details of the subaward.

- **Total Amount** *(Unit Price)*: Equals funding for the first budget period; split between Line 1 & Line 2 based on total amount of the award; dependent on total amount and if overhead is being charged.
- **Subaward Description/Comments** *(Product Description)*: Details of the subaward. Please leverage the following format.

  Subaward on **[PI NAME]**'s prime award from **[PRIME SPONSOR]** project titled " **[ENTER PROJECT]**." This action funds Year **XX** at a rate of **$XXXXXX.00**. The sub recipient shall perform the work in accordance with the statement of work for the period of **MM/DD/YY- MM/DD/YY**. Total shall not exceed **$XXX,XXX.00**.

- All invoices are required to be received electronically at subaward-invoices@udel.edu.
- THIS IS AN OFFICE OF SPONSORED RESEARCH SUB RECIPIENT AND THE VENDOR SHOULD NOT RECEIVE A COPY OF THE PURCHASE ORDER; by design, the resulting PO won't be sent to the supplier.
- The original agreement and statement of work are in OSP.

Department Grant Administrator (required for Invoice approval) *

Subaward Details - Line 1 (153200)

‹ Previous | Save Progress | Next ›

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Subaward Details - Line 1 (153200)

Unit Price	23000 USD	Quantity	1	Total	0.00 USD

Product Description

Subaward on [PI NAME]'s prime award from [PRIME SPONSOR] project titled " [ENTER PROJECT]." This action funds Year XX at a rate of $XXXXXX.00. The sub recipient shall perform the work in accordance with the statement of work for the period of MM/DD/YY- MM/DD/YY. Total shall not exceed $XXX,XXX.00.

702 characters remaining

Commodity Code

RO-SUB - Research Office Subawards <$25K - to be used on Subaward form only, not to be used with any Goods or Services purchase.

Enter the details for **Line 1** using the template verbiage.

If the subaward is less than $25,000, the entire amount will be on Line 1.

For subawards less than $25,000, please enter the following values:

- **"0" in the Unit Price field**
- **"Placeholder" in the Product Description**
- **In the cart, check the new PO Type Override box before submitting order**

This line is needed if the resulting Purchase Order needs to be increased in the future, at that point the box should be unchecked.

For subawards greater than $25,000, please enter the following details:

- **Unit Price = Balance of the Award less the overhead (i.e. $75,000 = $100,000 - $25,000)**
- **Product Description = Subaward description/comments**

‹ Previous Save Progress Next ›

EXCHANGE TEST SITE

All Search (Alt+Q) 23,000.00 USD

Shop ▸ Shopping ▸ View Forms

Subaward Details - Line 1 (153200)

Unit Price	23000 USD	Quantity	1	Total	0.00 USD
Product Description	Subaward on [PI NAME]'s prime award from [PRIME SPONSOR] ... MM/DD/YY. Total shall not exceed $XXX,XXX.00. 702 characters remaining				
Commodity Code	RO-SUB - Research Office Subawards <$25K - to be used on Subaward form only, not to be used with any Goods or Services purchase.				

After completing Line 1, read the provided instructions before scrolling down to complete Line 2.

For subawards less than $25,000, please enter the following values:

- **"0" in the Unit Price field**
- **"Placeholder" in the Product Description**
- **In the cart, check the new PO Type Override box before submitting order**

This line is needed if the resulting Purchase Order needs to be increased in the future, at that point the box should be unchecked.

If the subaward is less than $25,000, *Line 2 will still need to be completed* with a zero-dollar value and marked as a placeholder (regardless of whether Line 2 will be increased in the future).

For subawards greater than $25,000, please enter the following details:

- **Unit Price = Balance of the Award less the overhead (i.e. $75,000 = $100,000 - $25,000)**
- **Product Description = Subaward description/comments**

If the subaward is greater than $25,000, the Unit Price on Line 2 should be the balance of total funds less the $25K allotted to Line 1.

Previous Save Progress Next

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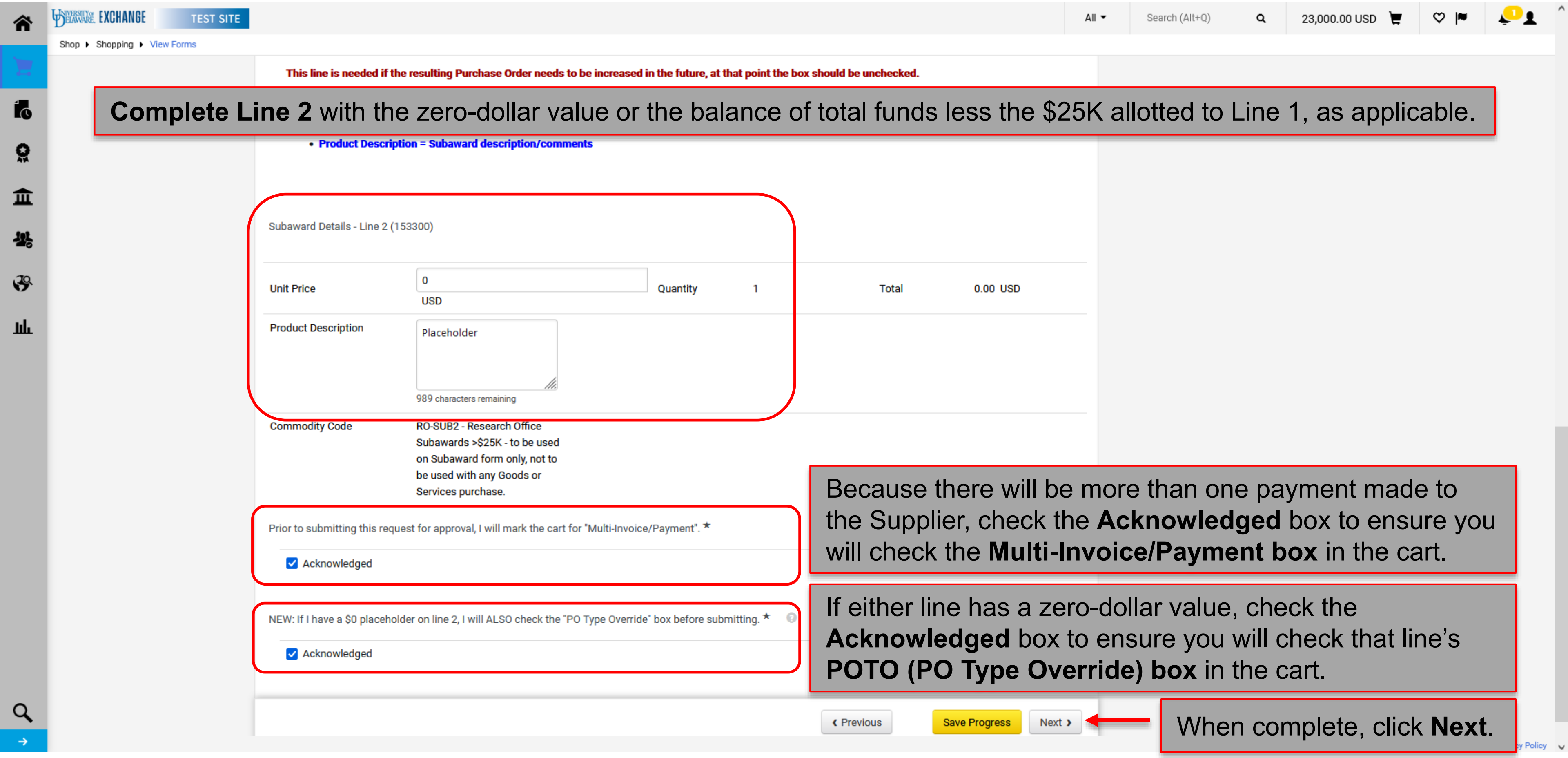
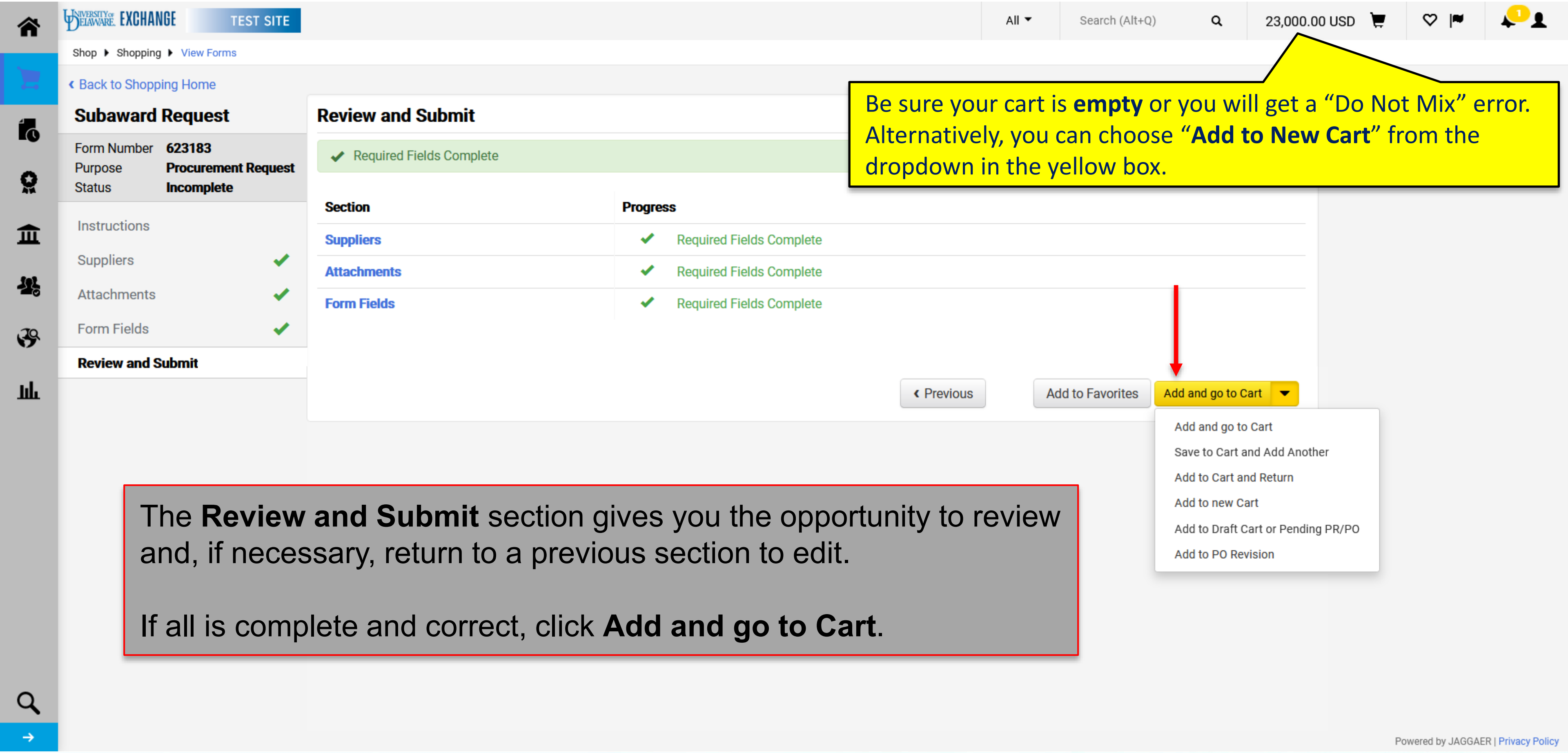


Complete Line 2 with the zero-dollar value or the balance of total funds less the $25K allotted to Line 1, as applicable.

Because there will be more than one payment made to the Supplier, check the **Acknowledged** box to ensure you will check the **Multi-Invoice/Payment box** in the cart.

If either line has a zero-dollar value, check the **Acknowledged** box to ensure you will check that line’s **POTO (PO Type Override) box** in the cart.

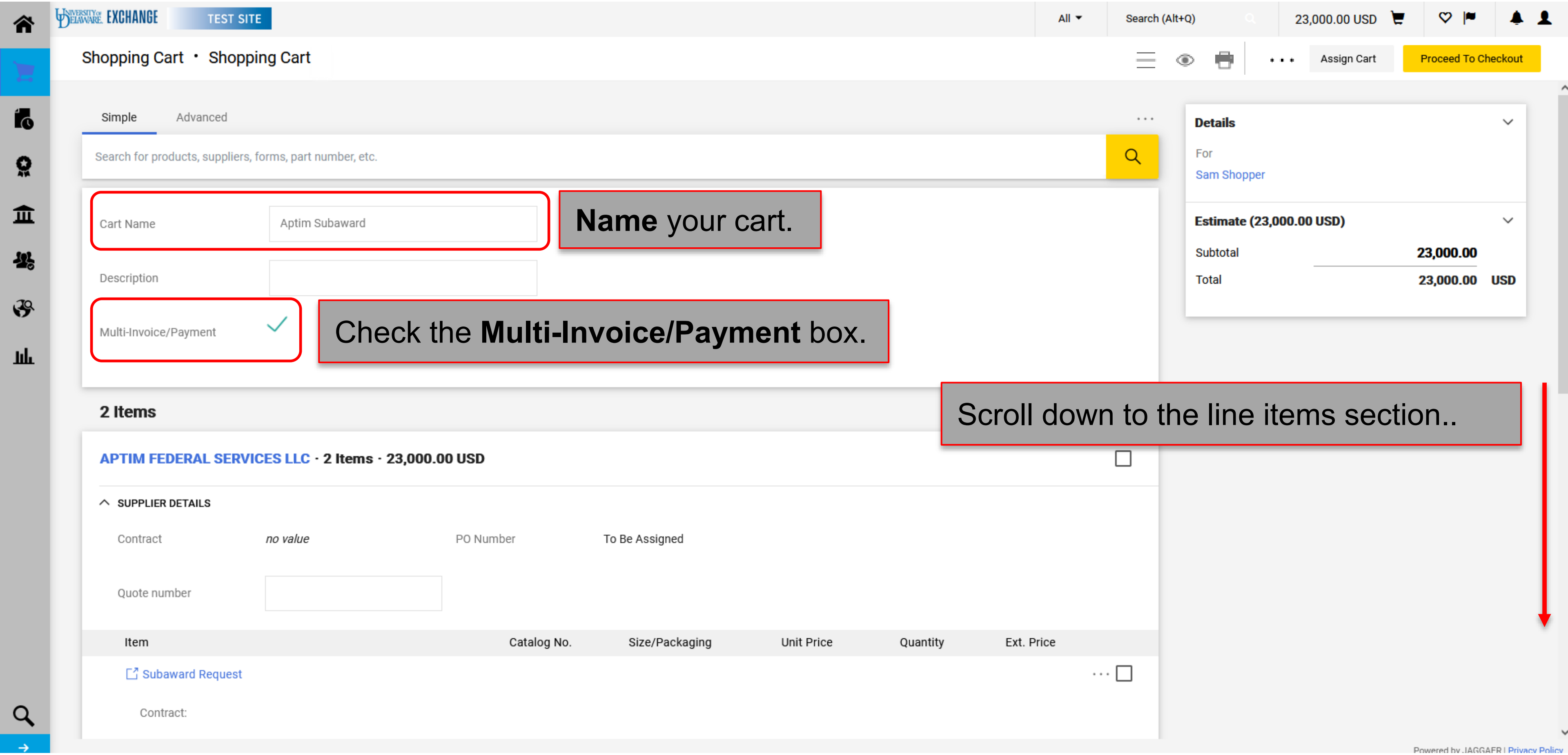
When complete, click **Next**.



Be sure your cart is **empty** or you will get a “Do Not Mix” error. Alternatively, you can choose “**Add to New Cart**” from the dropdown in the yellow box.

The **Review and Submit** section gives you the opportunity to review and, if necessary, return to a previous section to edit.

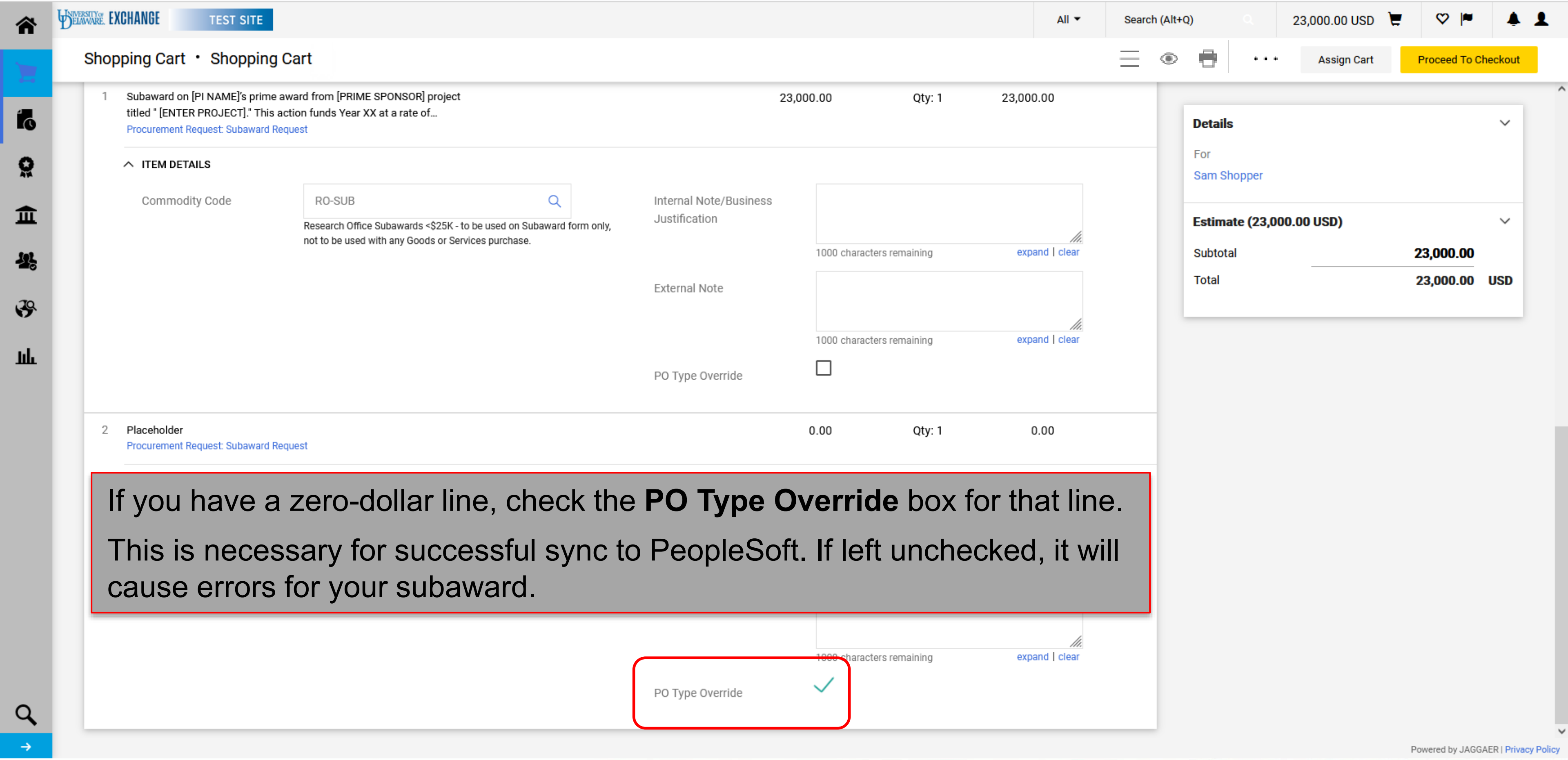
If all is complete and correct, click **Add and go to Cart**.



Name your cart.

Check the **Multi-Invoice/Payment** box.

Scroll down to the line items section..



If you have a zero-dollar line, check the **PO Type Override** box for that line.

This is necessary for successful sync to PeopleSoft. If left unchecked, it will cause errors for your subaward.

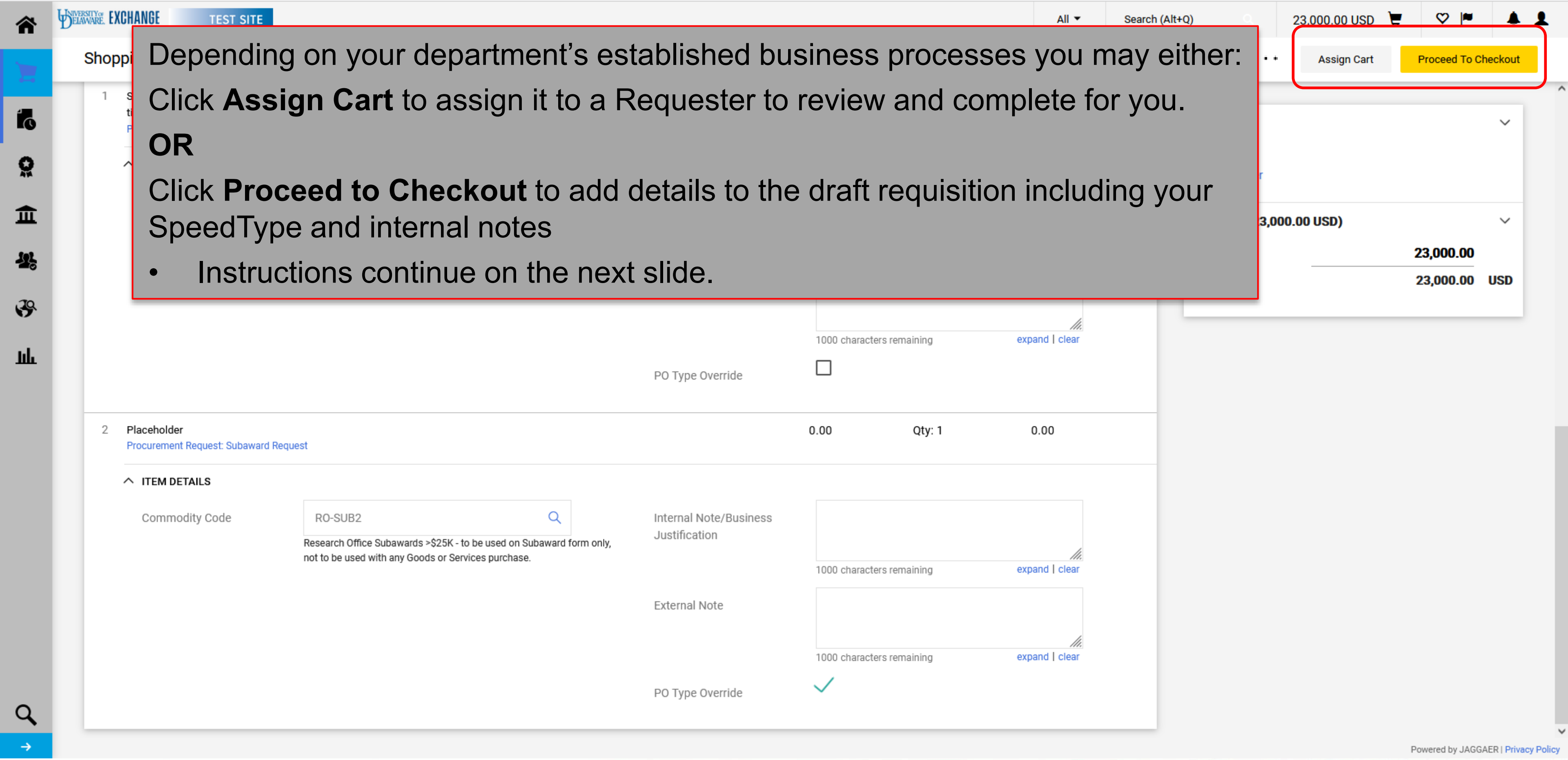
Depending on your department’s established business processes you may either:

Click **Assign Cart** to assign it to a Requester to review and complete for you.

OR

Click **Proceed to Checkout** to add details to the draft requisition including your SpeedType and internal notes

- Instructions continue on the next slide.



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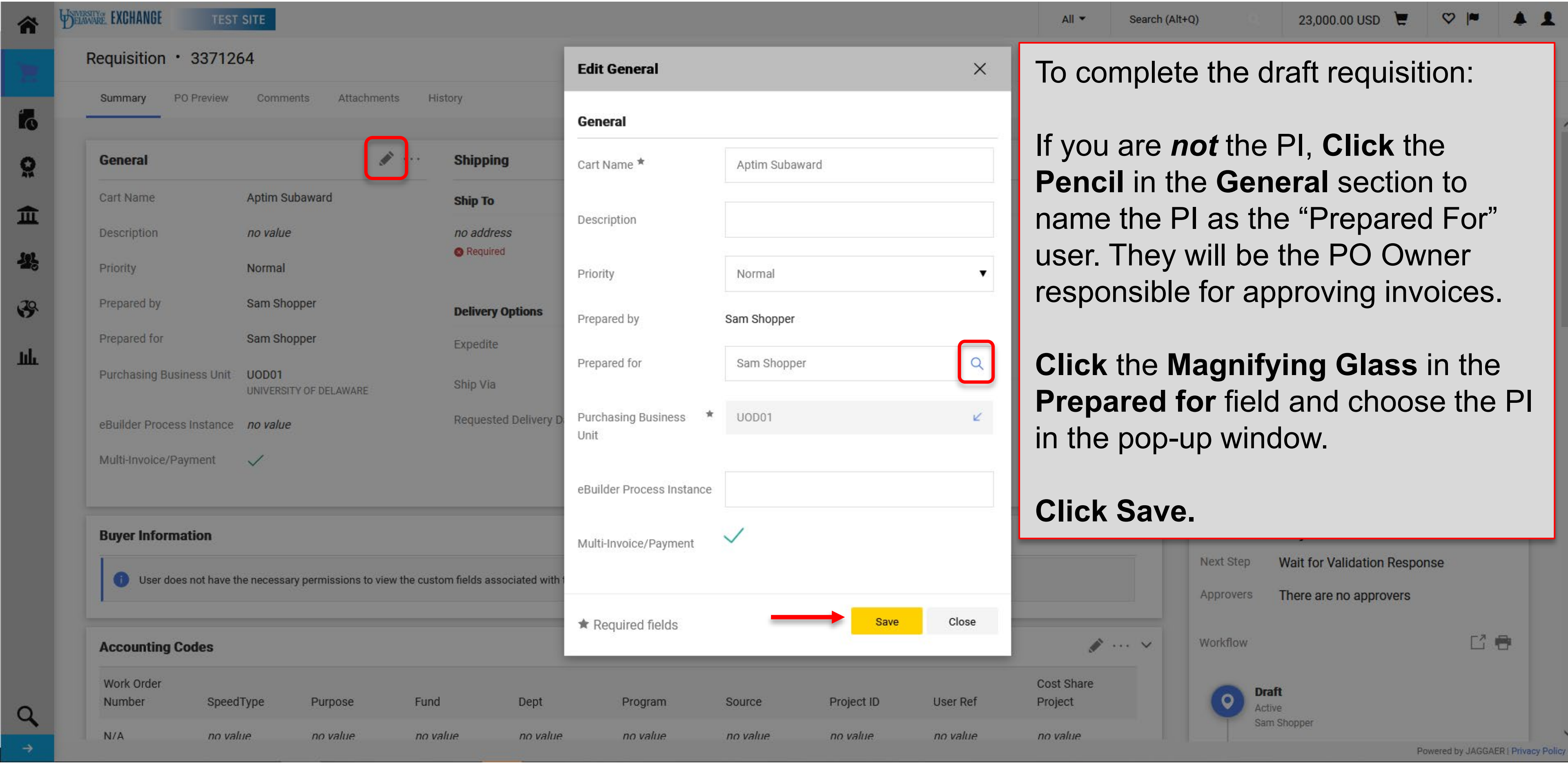
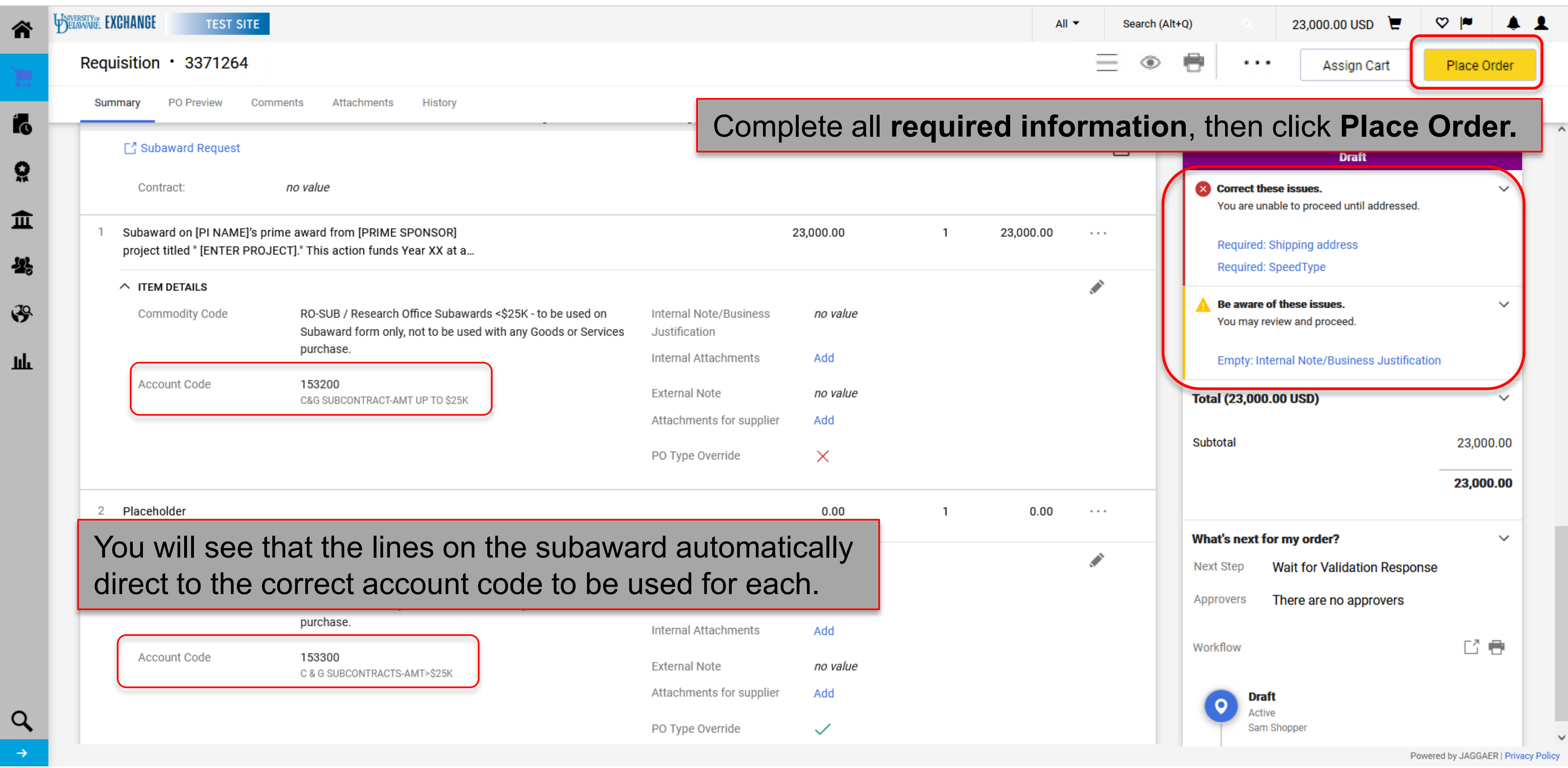


To complete the draft requisition:

If you are ***not*** the PI, **Click** the **Pencil** in the **General** section to name the PI as the "Prepared For" user. They will be the PO Owner responsible for approving invoices.

Click the **Magnifying Glass** in the **Prepared for** field and choose the PI in the pop-up window.

Click Save.


UNIVERSITY OF DELAWARE EXCHANGE
TEST SITE
All
Search (Alt+Q)
23,000.00 USD
Requisition • 3371264
Assign Cart
Place Order
Summary
PO Preview
Comments
Attachments
History
Complete all **required information**, then click **Place Order.**
Subaward Request
Contract: no value
1 Subaward on [PI NAME]'s prime award from [PRIME SPONSOR] project titled " [ENTER PROJECT]." This action funds Year XX at a... 23,000.00 1 23,000.00
ITEM DETAILS
Commodity Code RO-SUB / Research Office Subawards <$25K - to be used on Subaward form only, not to be used with any Goods or Services purchase.
Account Code 153200 C&G SUBCONTRACT-AMT UP TO $25K
Internal Note/Business Justification no value
Internal Attachments Add
External Note no value
Attachments for supplier Add
PO Type Override
2 Placeholder 0.00 1 0.00
You will see that the lines on the subaward automatically direct to the correct account code to be used for each.
purchase.
Account Code 153300 C & G SUBCONTRACTS-AMT>$25K
Internal Attachments Add
External Note no value
Attachments for supplier Add
PO Type Override
Draft
Correct these issues.
You are unable to proceed until addressed.
Required: Shipping address
Required: SpeedType
Be aware of these issues.
You may review and proceed.
Empty: Internal Note/Business Justification
Total (23,000.00 USD)
Subtotal 23,000.00
23,000.00
What's next for my order?
Next Step Wait for Validation Response
Approvers There are no approvers
Workflow
Draft
Active
Sam Shopper
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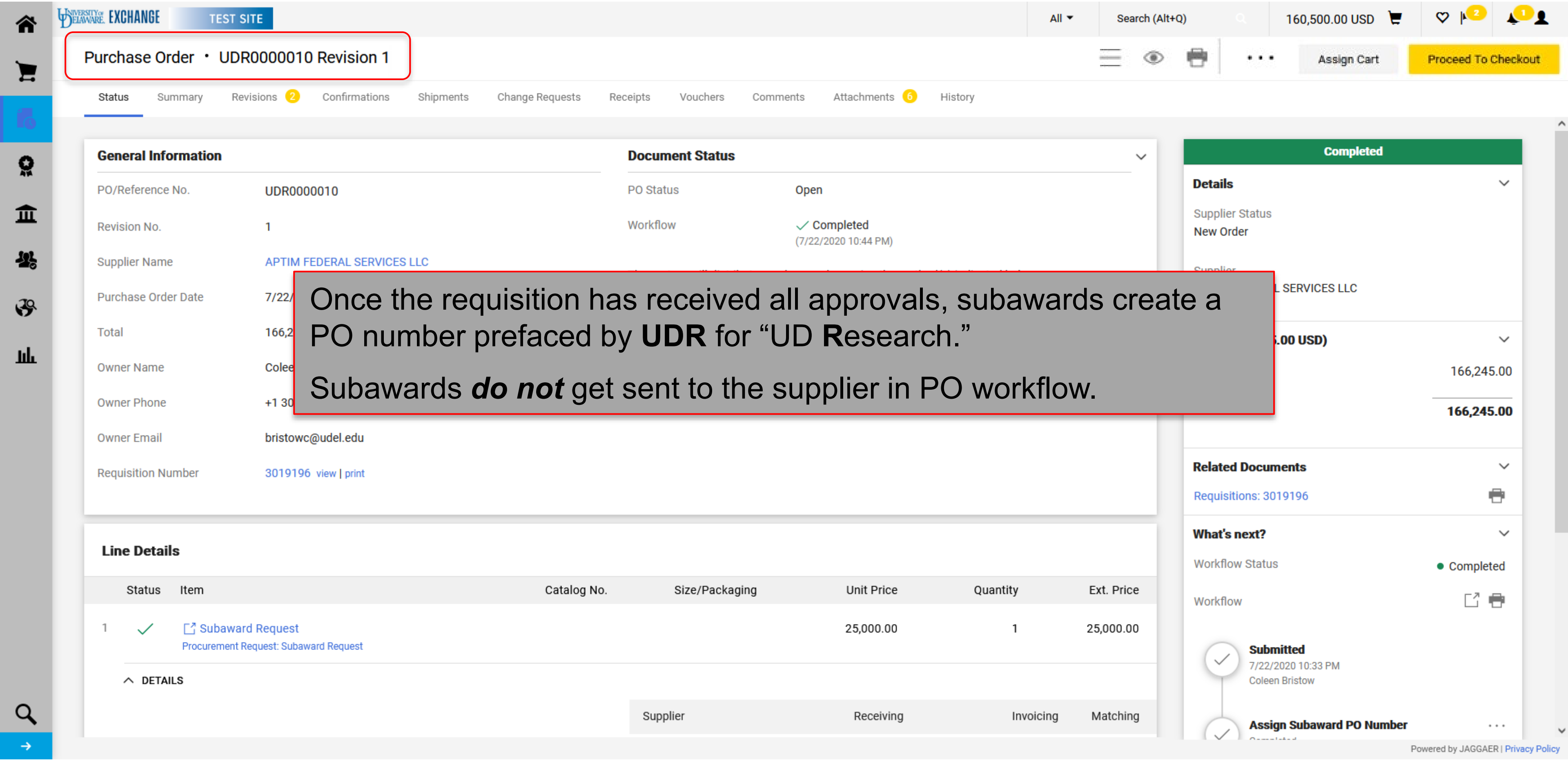
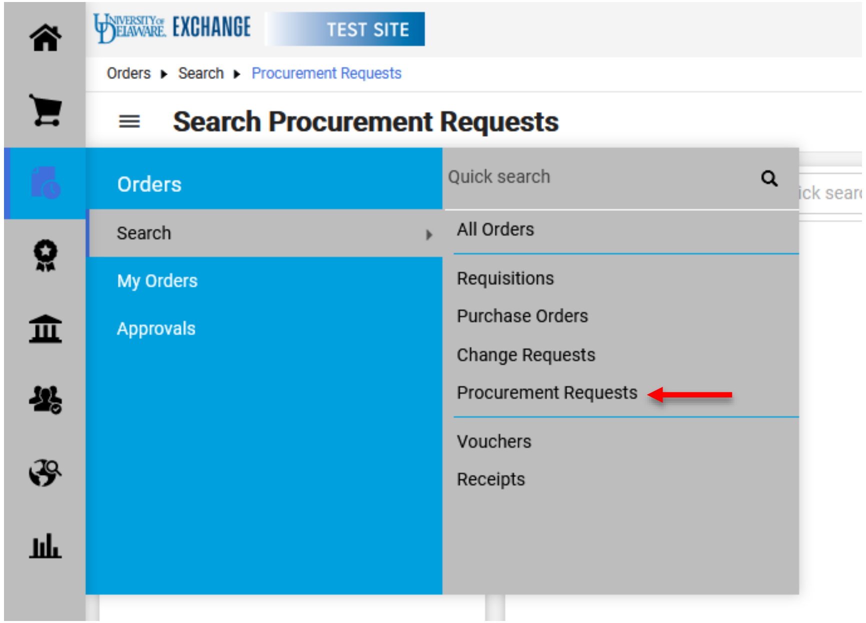


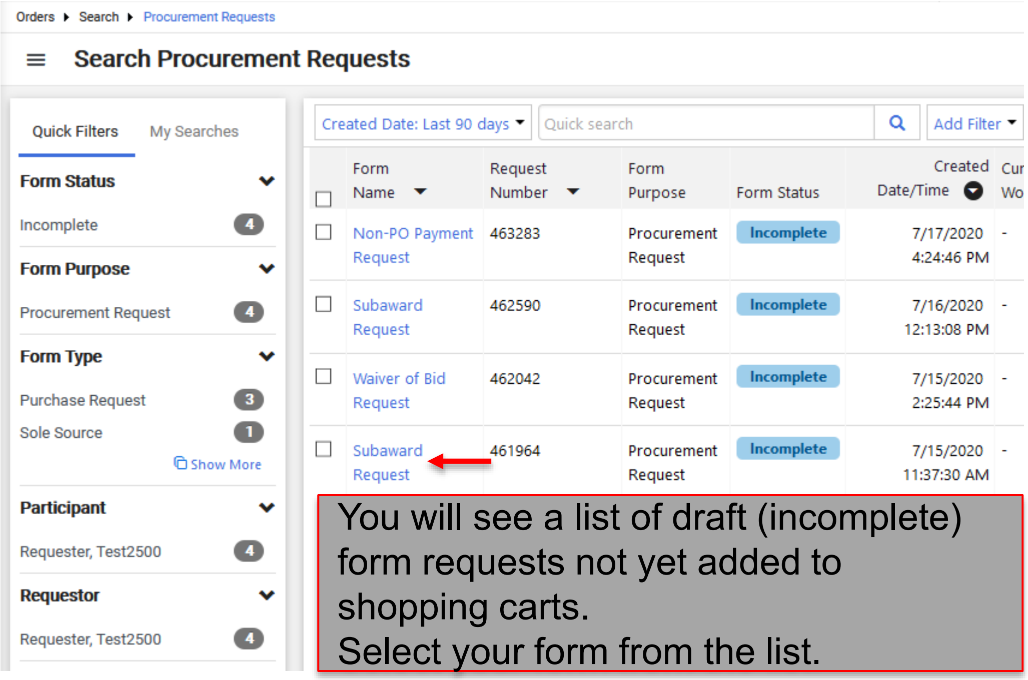
Once the requisition has received all approvals, subawards create a PO number prefaced by **UDR** for “UD **R**esearch.”

Subawards ***do not*** get sent to the supplier in PO workflow.

Retrieving a Saved Form

If you saved a draft by clicking “**Save Progress**”, go to **Orders>Search>Procurement Requests** to retrieve it.

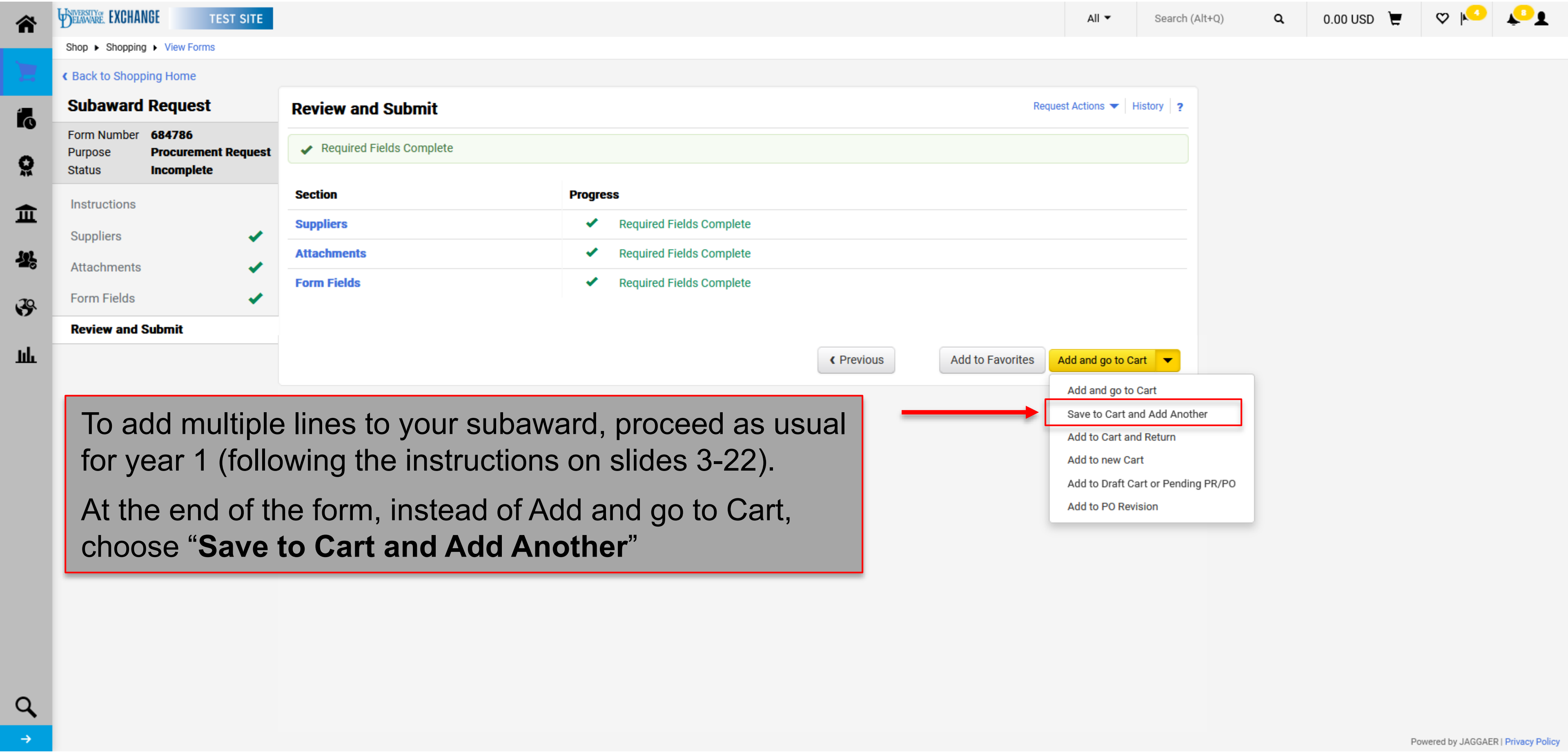




You will see a list of draft (incomplete) form requests not yet added to shopping carts.
Select your form from the list.

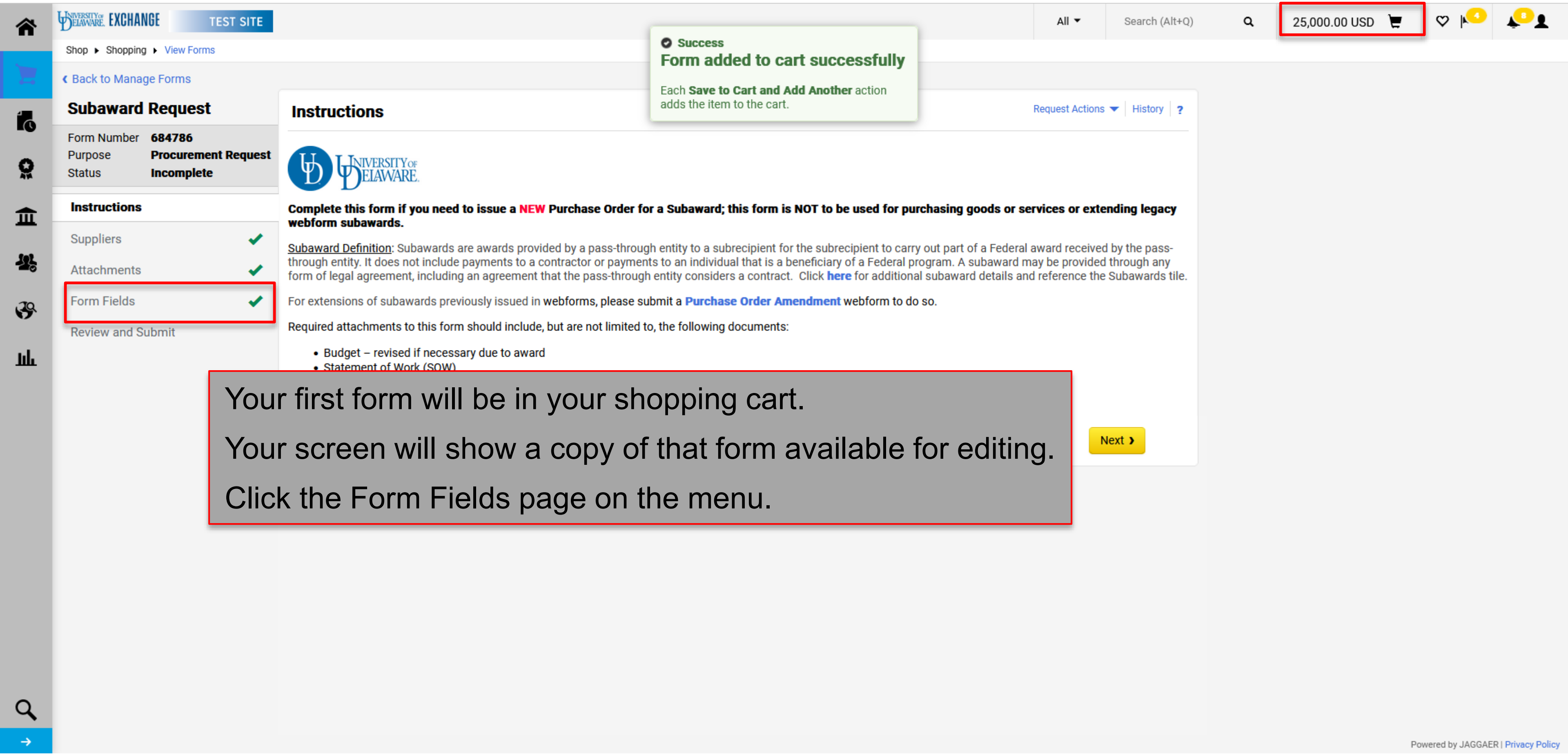
Creating Subawards with more than two lines

- Some users prefer to have multiple 153200 and 153300 lines for subaward increases for future years rather than increase an existing line.
- If the funding for the subaward will change over time, new lines will be necessary.
- If the subaward is fully vouchered before additional funds are added, new lines are recommended to allow future change requests and prevent the subaward from automatically closing.
- The following slides depict how to add multiple lines *at the time the subaward is created*.
- **If multiple lines are needed *after* the subaward is created, Procurement Help will need to do this on your behalf.** See slides 53-57 for this process.



To add multiple lines to your subaward, proceed as usual for year 1 (following the instructions on slides 3-22).

At the end of the form, instead of Add and go to Cart, choose "**Save to Cart and Add Another**"



Your first form will be in your shopping cart.

Your screen will show a copy of that form available for editing.

Click the Form Fields page on the menu.

Shop ▸ Shopping ▸ View Forms

Unit Price	0 USD	Quantity	1	Total	25,000.00 USD
Product Description	Year 2 - do not use 981 characters remaining				
Commodity Code	RO-SUB - Research Office Subawards <$25K - to be used on Subaward form only, not to be used with any Goods or Services purchase.				

For subawards less than $25,000, please enter the following values:

- **"0" in the Unit Price field**
- **"Placeholder" in the Product Description**
- **In the cart, check the new PO Type Override box before submitting order**

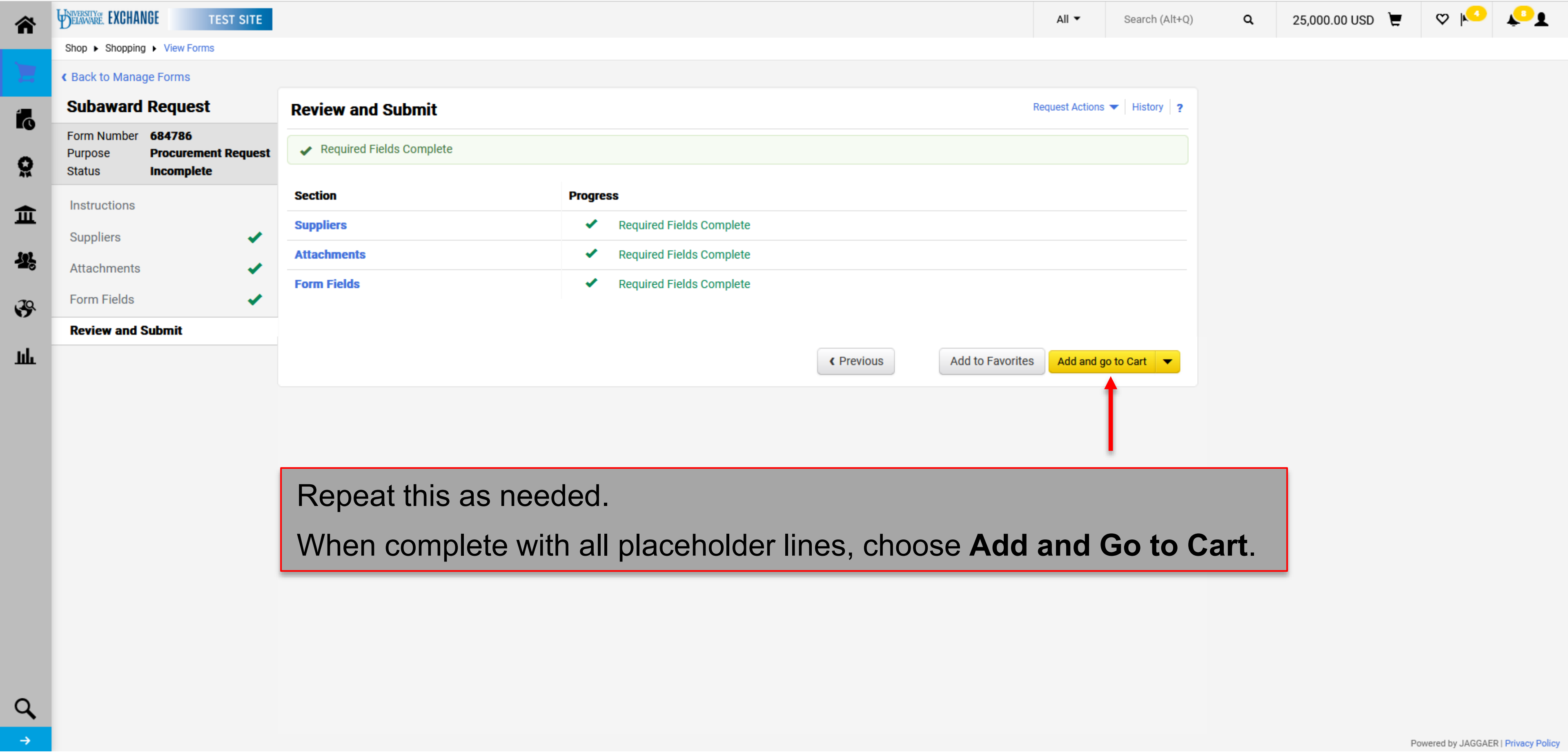
On the Form Fields page, edit your lines for placeholders.

Every form you edit and add must contain two lines, but they do not need to be funded.

Subaward Details - Line 2 (153300)

Unit Price	0.00 USD	Quantity	1	Total	0.00 USD
Product Description	Year 2 Placeholder				

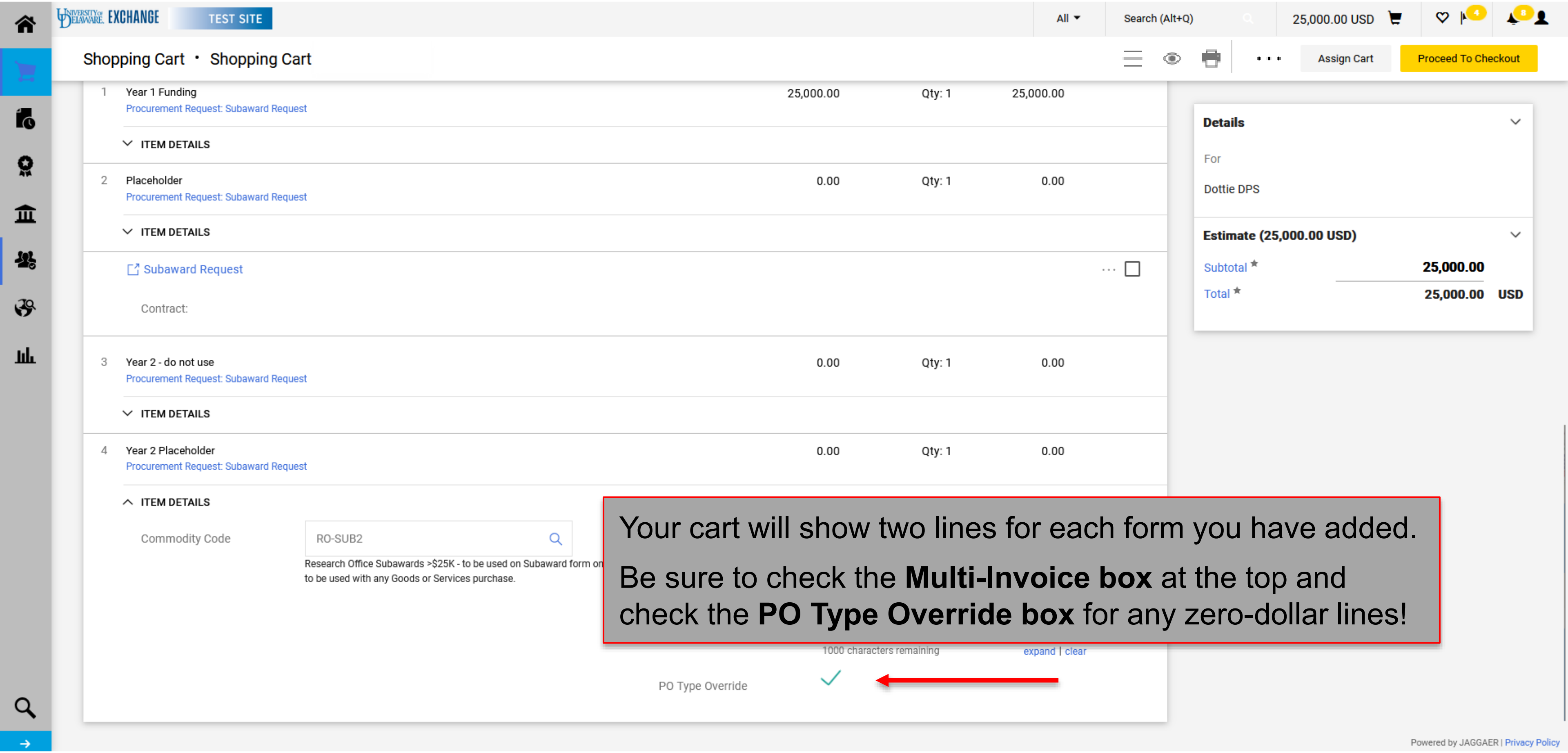
‹ Previous Save Progress Next ›



Repeat this as needed.

When complete with all placeholder lines, choose **Add and Go to Cart**.

University of Delaware



Your cart will show two lines for each form you have added.

Be sure to check the **Multi-Invoice box** at the top and check the **PO Type Override box** for any zero-dollar lines!

EXCHANGE TEST SITE

All · Search (Alt+Q) · 0.00 USD

Purchase Order • UDRT000052 Revision 0

Status · Summary · Revisions 1 · Confirmations · Shipments · Change Requests · Receipts · Vouchers 1 · Comments · Attachments · History

Records found: 1, Totaling: 25,000.00 USD

Voucher No.	Supplier Voucher No.	Voucher Date	Due Date	Voucher Type	Payment Status	Voucher Total	Invoiced By
IT000961	year1invoice	5/27/2022	5/27/2022	Voucher	Payable	25,000.00 USD	Pickering, Kristen

Line Details

Line No.	Product Name	Catalog No.	Unit Price	Qty/UOM	Extended Price	Voucher Qty/Cost	Status
1	Year 1 Funding		25,000.00 USD	1	25,000.00 USD	n/a / **25,000.00 USD**	**Net Invoiced**
2	Placeholder		0.00 USD	1	0.00 USD		
3	Year 2 - do not use		0.00 USD	1	0.00 USD		
4	Year 2 Placeholder		0.00 USD	1	0.00 USD		

Completed

Details

Supplier Status

New Order

Supplier

SALISBURY UNIVERSITY FOUNDATION INC

Total (25,000.00 USD)

Subtotal 25,000.00

25,000.00

Related Documents

Requisition: 3535063

Voucher: IT000961

Once the PO is complete, only the funded lines will be invoiced.
Open, zero dollar lines will allow for future change requests and prevent the PO from closing.

Instructions for subaward change requests begin on slide 31.

Subaward Change Requests

- A change request is required to make the following changes to a subaward:
  - Date extension
  - Funding increase
  - Funding changes
- If subaward requires a change request (e.g., date extension, funding increase, funding change), it will require edits to the **subaward form** that is *linked* to the PO in UDX.
- If funding changes are required *after* the line has been vouchered, the line **cannot** be changed. Instead, **the balance must be moved to a new line**.
- The following slides illustrate how to create change requests to subawards in these scenarios.
  - Please note that only a Requester or DPS with access to the PO Owner's department in UDX will be able to create and submit a change request.

Change Request for a Date Extension

UNIVERSITY OF DELAWARE EXCHANGE TEST SITE

All ▾ Search (Alt+Q) 1.00 USD

Purchase Order • DARTMOUTH COLLEGE TRUSTEE OF • UDRT000060 Revision 0

Status | Summary | Revisions 1 | Confirmations | Shipments | Change Requests | Receipts | Vouchers | Comments | Attachments | History

2 Lines

	Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
		Subaward Request					
		Contract: no value					
1	✓	Subaward on Soprano's prime award from National Science Foundation project titled " Collaborative Research: Waste management and processing of nanoplastics for renewable energy." This action funds the first year of the project as awarded for the first budget period in the amount of $125,000.00. The sub recipient shall perform the work in accordance with the statement of work for the period of 10/01/2021-09/30/2022. Total shall not exceed $125,000.00 for the first budget period. Procurement Request: Subaward Request			25,000.00	Qty: 1	25,000.00

ITEM DETAILS

Taxable ✕ Requisition Number 3712409 view | print

	Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
2	✓	Subaward on Soprano's prime award from National Science Foundation project titled " Collaborative Research: Waste management and processing of nanoplastics for renewable energy." This action funds the first year of the project as awarded for the first budget period in the amount of $125,000.00. The sub recipient shall perform the work in accordance with the statement of work for the period of 10/01/2021-09/30/2022. Total shall not exceed $125,000.00 for the first budget period. Procurement Request: Subaward Request			100,000.00	Qty: 1	100,000.00

Completed

Details

Supplier Status

New Order

Supplier

DARTMOUTH COLLEGE TRUSTEE OF

Total (125,000.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal 125,000.00

125,000.00

● Completed

Workflow

Show skipped steps

Submitted
2/21/2023 1:33 PM
Margot Martin

https://usertest.sciquest.com/apps/Router/ShoppingDashboardUserDetails?tmstmp=1676682602315

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Scenario:

This subaward needs to be updated to reflect a *date extension*.

This change request is only intended to update the date in the description field on the lines.

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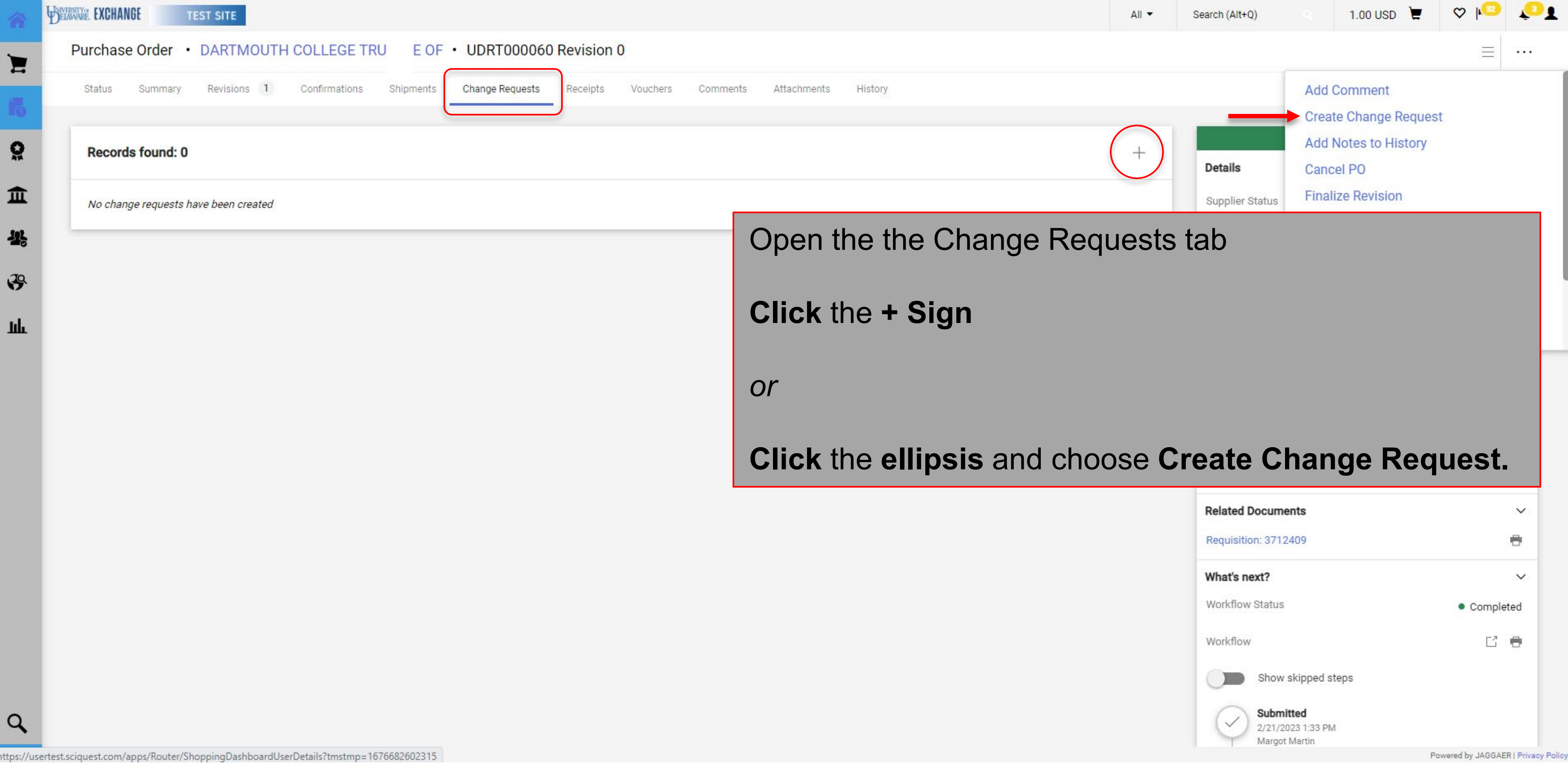
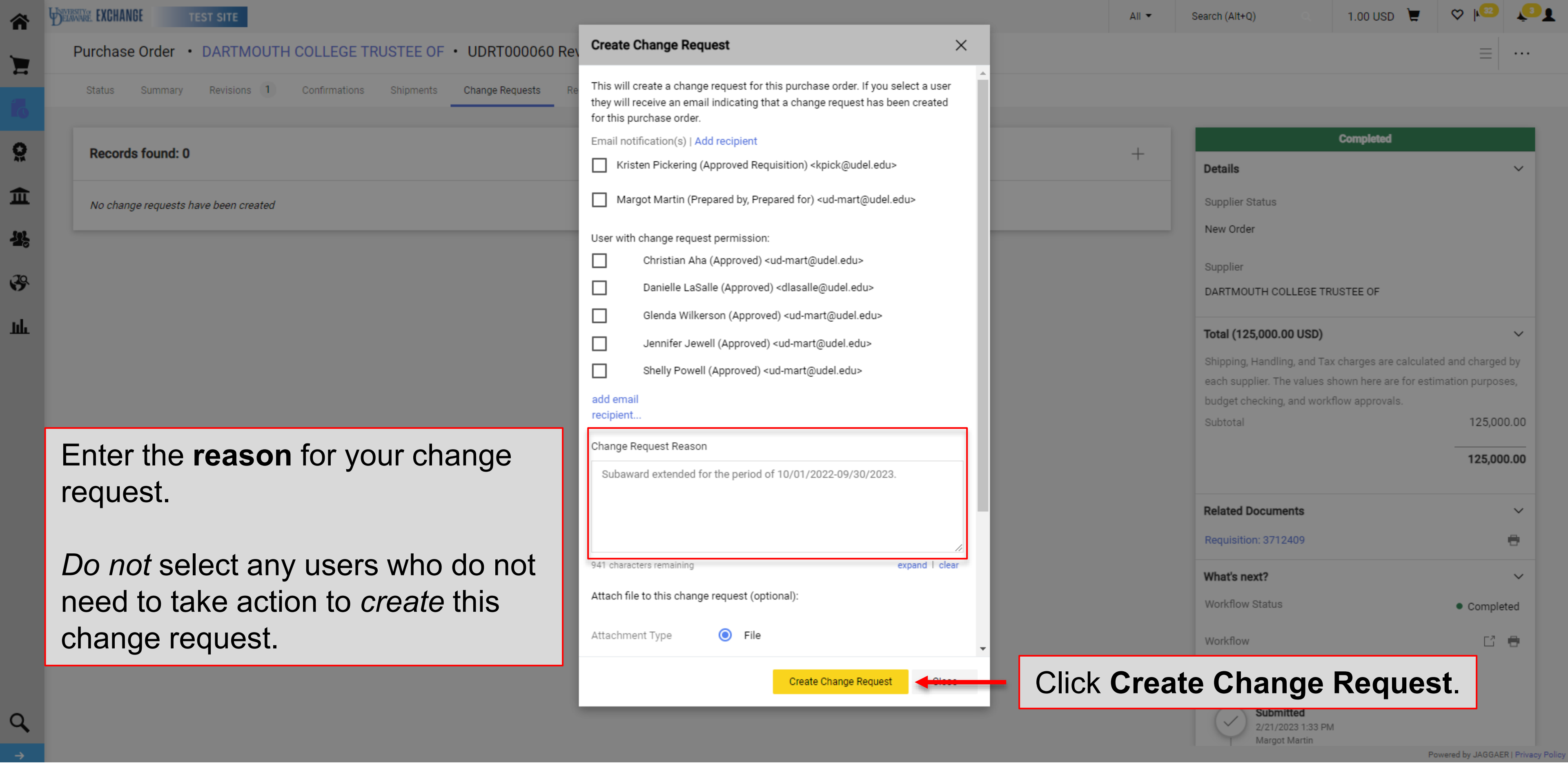


Open the the Change Requests tab

Click the **+ Sign**

or

Click the **ellipsis** and choose **Create Change Request.**

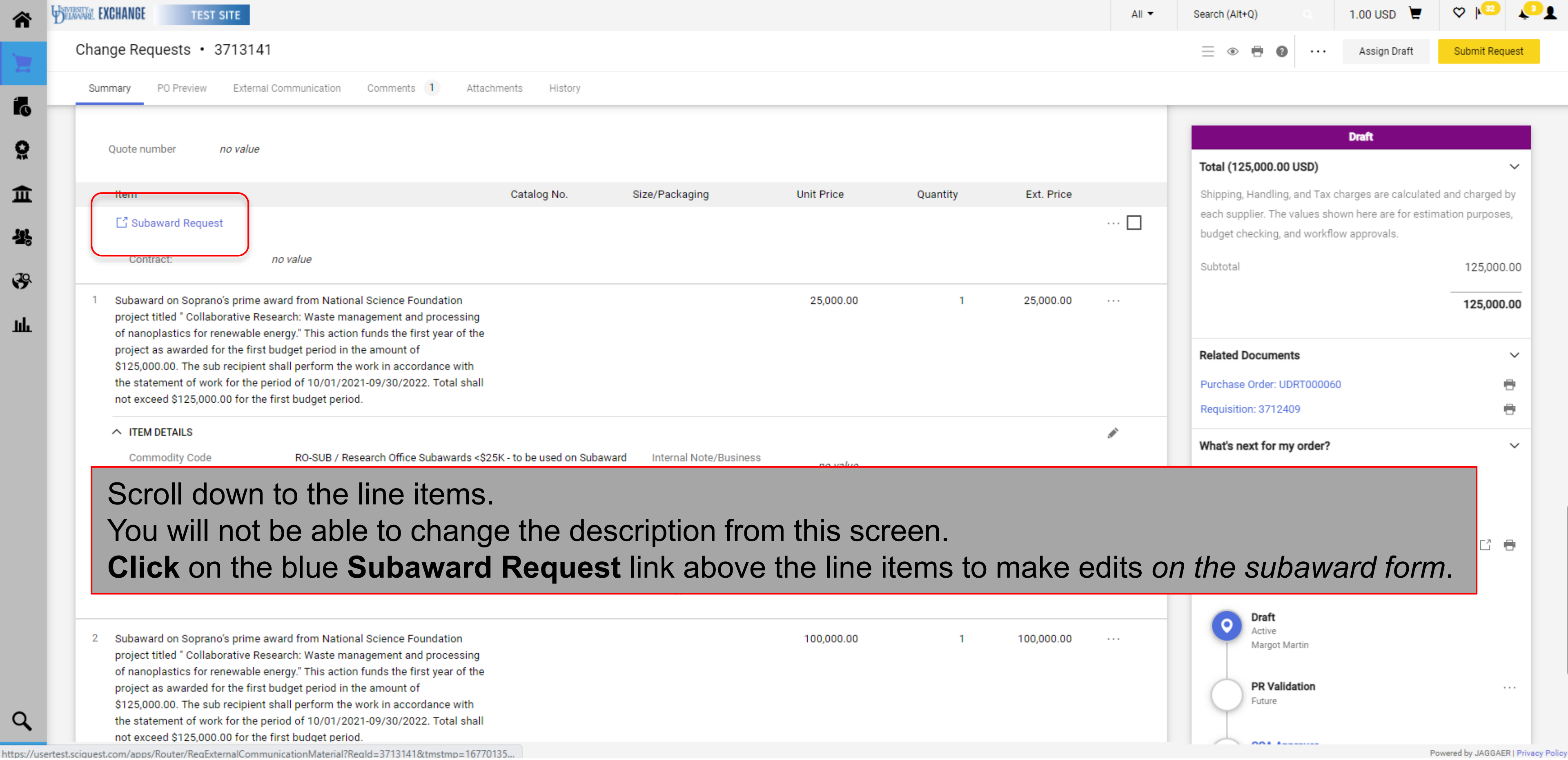


Enter the **reason** for your change request.

Do not select any users who do not need to take action to *create* this change request.

Click **Create Change Request**.

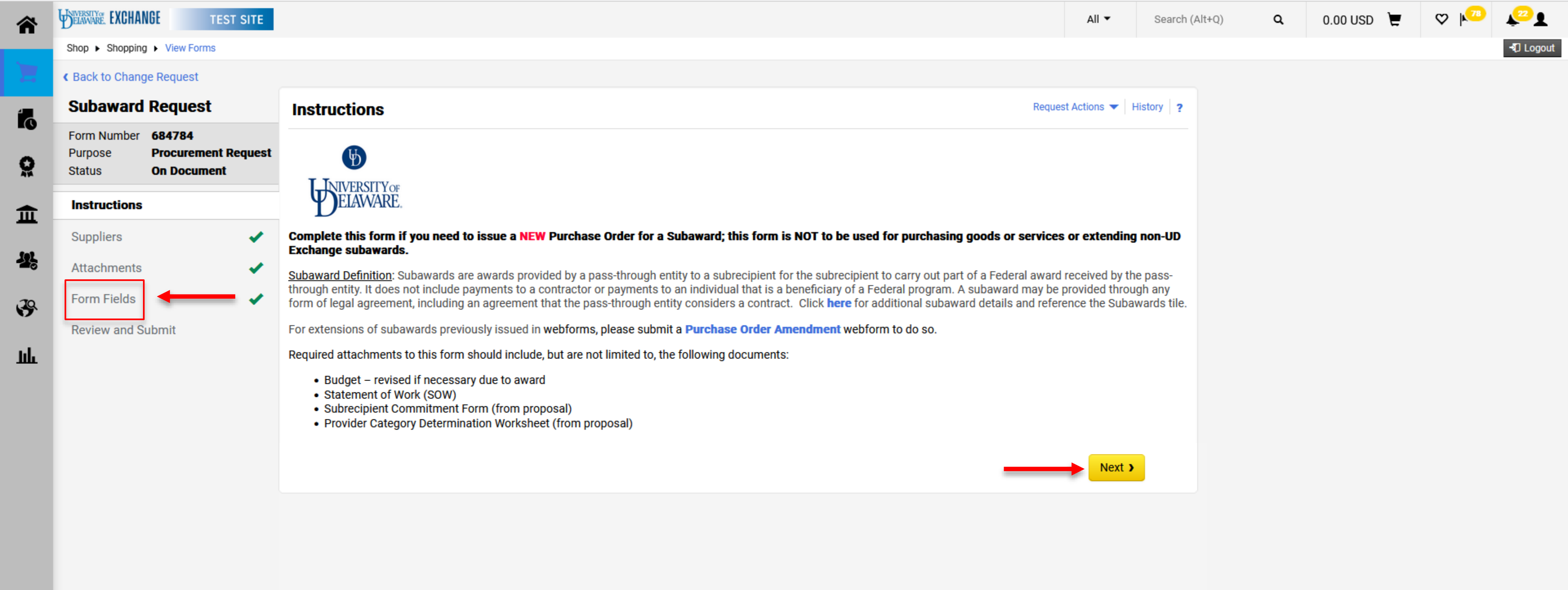
UNIVERSITY OF DELAWARE



Scroll down to the line items.

You will not be able to change the description from this screen.

Click on the blue **Subaward Request** link above the line items to make edits *on the subaward form*.



To edit the items you entered on your initial subaward form, navigate to the **Form Fields** page using the **Next** button or the **menu items on the left of the form**.

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All ▾ Search (Alt+Q) 1.00 USD

Shop ▸ Shopping ▸ View Forms

Logout

- "Placeholder" in the Product Description
- In the cart, check the new PO Type Override box before submitting order

This line is needed if the resulting Purchase Order needs to be increased in the future, at that point the box should be unchecked.

For subawards greater than $25,000, please enter the following details:

- **Unit Price = Balance of the Award less the overhead (i.e. $75,000 = $100,000 - $25,000)**
- **Product Description = Subaward description/comments**

Subaward Details - Line 2 (153300)

Unit Price	100,000.00	USD	Quantity	1	Total	100,000.00 USD

Product Description

Subaward on Soprano's prime award from National Science Foundation project titled " Collaborative Research: Waste management and processing of nanoplastics for renewable energy." The first action funded period 1 in the amount of $125,000.00. The second action funds the award for BP2 10/01/2022-9/30/2023. The total shall not exceed $125,000.00 through the 2nd budget period The sub-recipient shall perform the work in accordance with the statement of work for the period of 10/01/2021-09/30/2023.

503 characters remaining

Commodity Code

RO-SUB2 - Research Office Subawards >$25K - to be used on Subaward form only, not to be used with any Goods or Services purchase.

Edit the Description on line 2. When complete, click **Save on Change Request**.

☑ Acknowledged

NEW: If I have a $0 placeholder on line 2, I will ALSO check the "PO Type Override" box before submitting. *

☑ Acknowledged

‹ Previous | Save on Change Request | Next ›

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UNIVERSITY OF DELAWARE EXCHANGE TEST SITE

All | Search (Alt+Q) | 0.00 USD

Shop ▸ Shopping ▸ View Forms

Logout

‹ Back to Change Request

Subaward Request

Form Number **684784**
Purpose **Procurement Request**
Status **On Document**

- Instructions
- Suppliers ✔
- Attachments ✔
- **Form Fields** ✔
- Review and Submit

Form Fields - Subaward

Request Actions | History | ?

★ Response Is Required

Subaward Details

Please complete the following fields as outlined below:

- **Total Amount** *(Unit Price)*: Equals funding for the first budget period; split between Line 1 & Line 2 based on total amount of the award; dependent on total amount and if overhead is being charged.
- **Subaward Description/Comments** *(Product Description)*: Details of the subaward. Please leverage the following format.

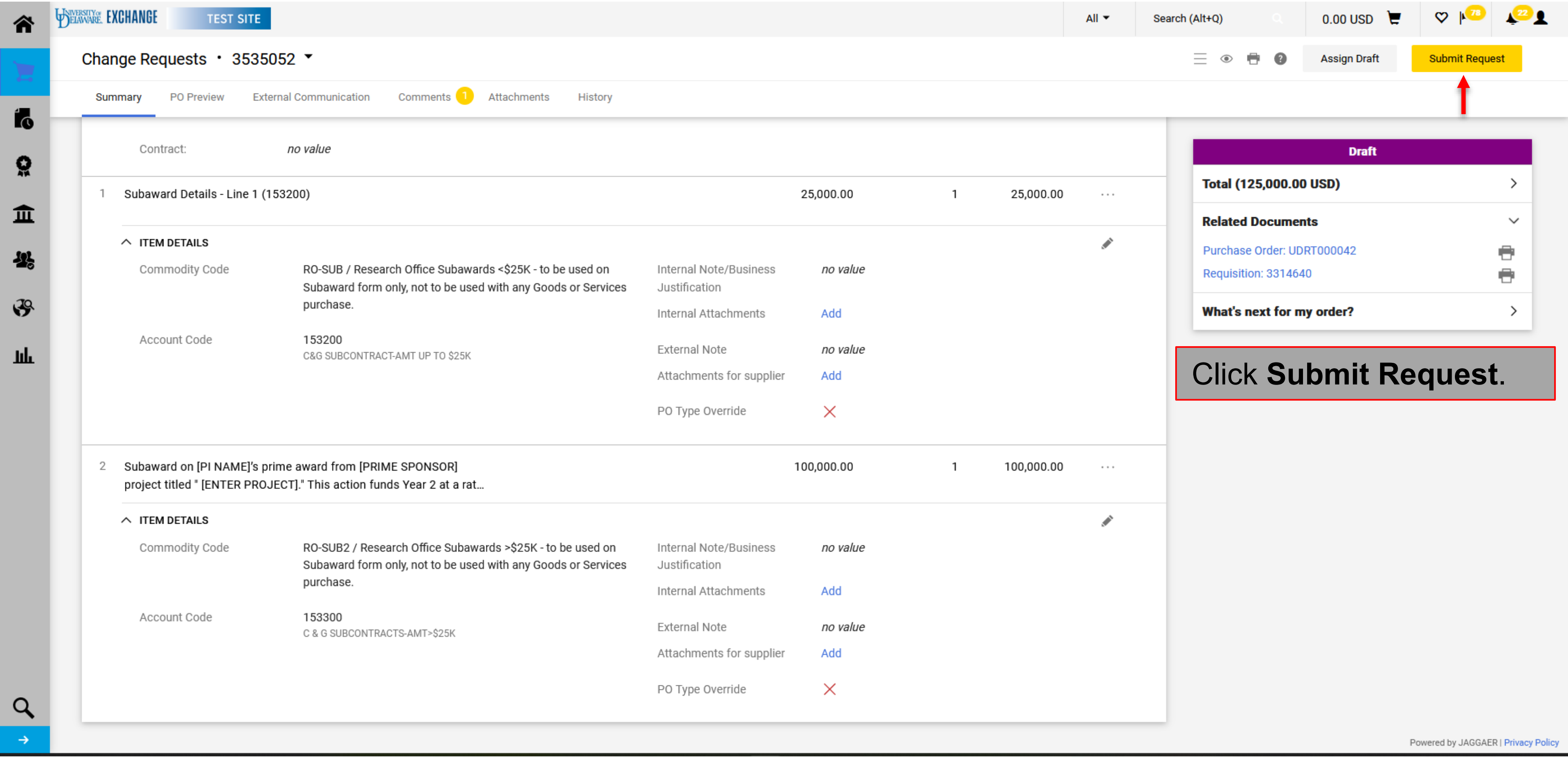
  Subaward on **[PI NAME]**'s prime award from **[PRIME SPONSOR]** project titled " **[ENTER PROJECT]**." This action funds Year **XX** at a rate of **$XXXXXX.00**. The sub recipient shall perform the work in accordance with the statement of work for the period of **MM/DD/YY- MM/DD/YY**. Total shall not exceed **$XXX,XXX.00**.

- All invoices are required to be received electronically at subaward-invoices@udel.edu.
- THIS IS AN OFFICE OF SPONSORED RESEARCH SUB RECIPIENT AND THE VENDOR SHOULD NOT RECEIVE A COPY OF THE PURCHASE ORDER; by design, the resulting PO won't be sent to the supplier.
- The original agreement and statement of work are in OSP.

When all edits to the form are complete, click on **Back to Change Request** in the top left of the form.

Diane Johnson

‹ Previous | Save on Change Request | Next ›



Click **Submit Request.**

Change Request for a Funding Increase

EXCHANGE TEST SITE

All ▾ Search (Alt+Q) 0.00 USD

Purchase Order • UDRT000042 Revision 1

Status | Summary | Revisions 2 | Confirmations | Shipments | Change Requests | Receipts | Vouchers 2 | Comments 2 | Attachments | History

Records found: 2, Totaling: 2,000.00 USD

Voucher No.	Supplier Voucher No.	Voucher Date	Due Date	Voucher Type	Payment Status	Voucher Total	Invoiced By
IT000743	test-2	8/10/2021	8/20/2021	Voucher	Payable	1,000.00 USD	Pickering, Kristen
IT000742	test-1	8/10/2021	9/9/2021	Voucher	Payable	1,000.00 USD	Pickering, Kristen

Line Details

Line No.	Product Name	Catalog No.	Unit Price	Qty/UOM	Extended Price	Voucher Qty/Cost	Status
1	Subaward Details - Line 1...		25,000.00 USD	1	25,000.00 USD	n/a / 23,000.00 USD n/a / 2,000.00 USD	Open Net Invoiced
2	Subaward Details - Line 2...		0.00 USD	1	0.00 USD		

Completed

Details

Supplier Status

New Order

Supplier

DARTMOUTH COLLEGE TRUSTEE OF

Total (25,000.00 USD)

Related Documents

Requisition: 3314640

Voucher: IT000742

Voucher: IT000743

What's next?

Scenario:

This subaward needs to be *increased* for year 2 funding on line 2.

The change request is only intended to fund the amount and update the description on that line.

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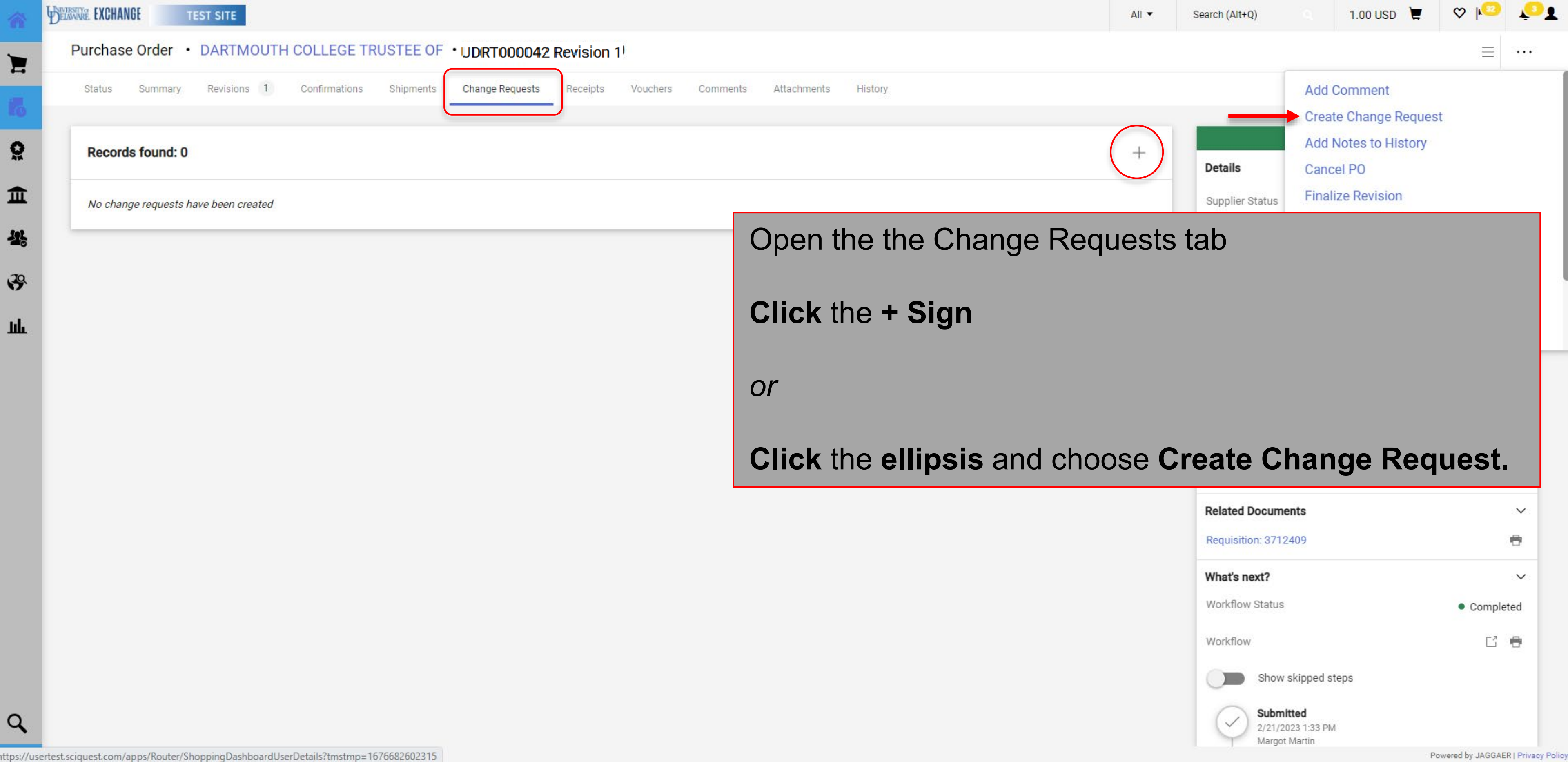
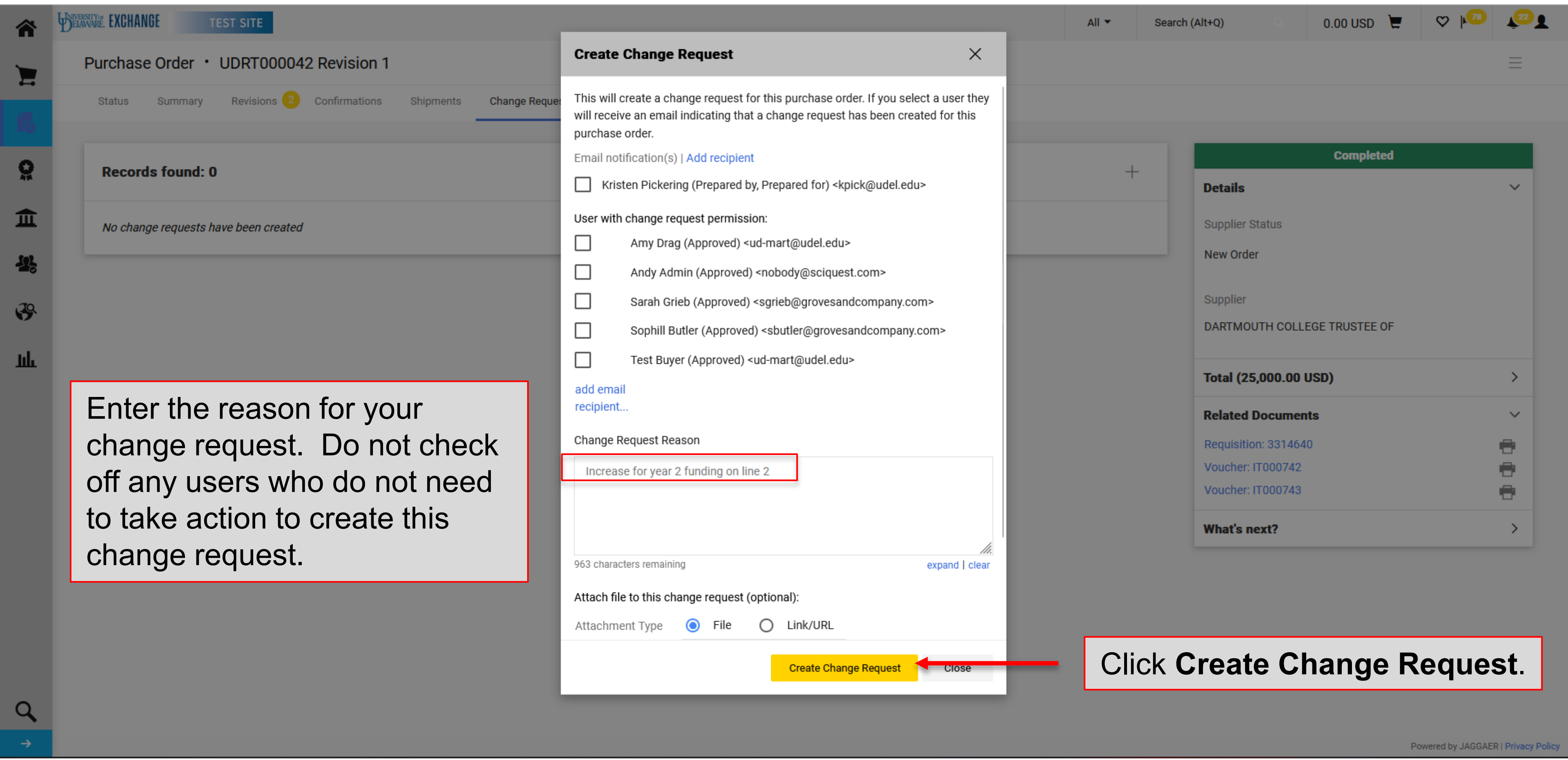


Open the the Change Requests tab

Click the **+ Sign**

or

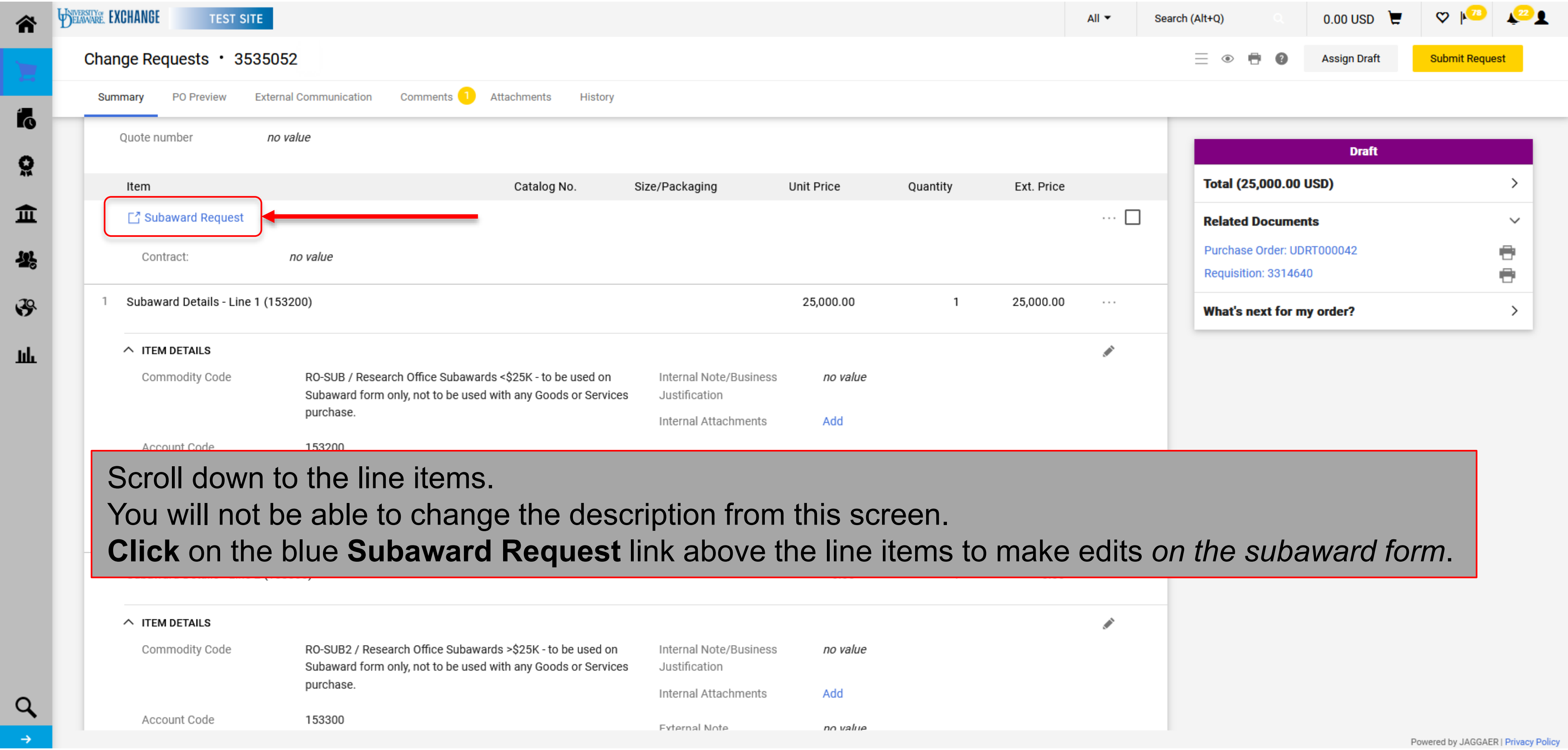
Click the **ellipsis** and choose **Create Change Request.**



Enter the reason for your change request. Do not check off any users who do not need to take action to create this change request.

Click **Create Change Request.**

University of Delaware



Scroll down to the line items.
You will not be able to change the description from this screen.
Click on the blue **Subaward Request** link above the line items to make edits *on the subaward form*.

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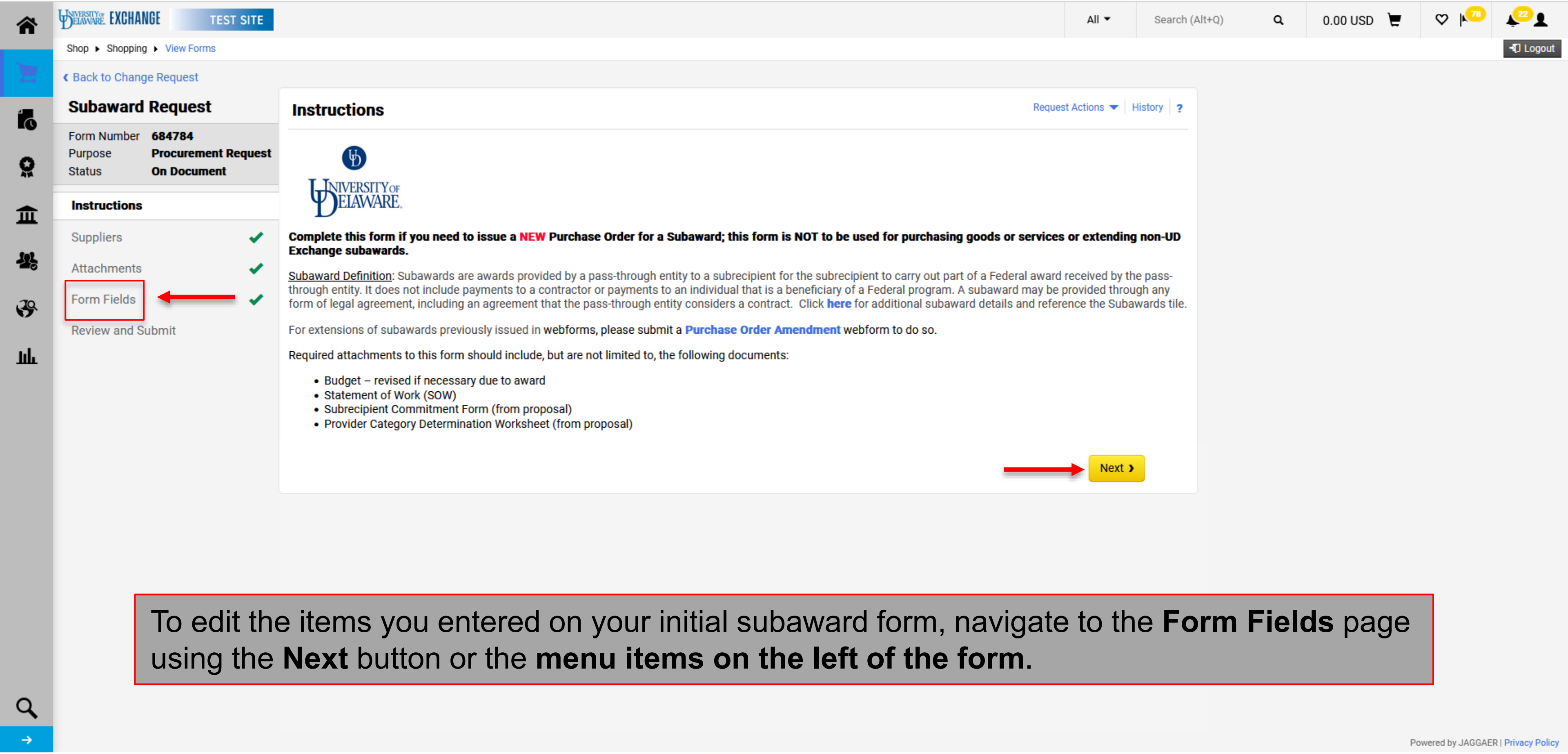

To edit the items you entered on your initial subaward form, navigate to the **Form Fields** page using the **Next** button or the **menu items on the left of the form**.

UD EXCHANGE TEST SITE

All | Search (Alt+Q) | 0.00 USD | 78 | 22

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- **"Placeholder" in the Product Description**

This line is needed if the resulting Purchase Order needs to be increased in the future.

For subawards greater than $25,000, please enter the following details:

- **Unit Price = Balance of the Award less the overhead (i.e. $75,000 = $100,000 - $25,000)**
- **Product Description = Subaward description/comments**

Subaward Details - Line 2 (153300)

Unit Price	100000.00 USD	Quantity 1	Total	0.00 USD
Product Description	Subaward on [PI NAME]'s prime award from [PRIME SPONSOR] project titled " [ENTER PROJECT]." This action funds Year 2 at a rate of $100,00.00. The sub recipient shall perform the work in accordance with the statement of work for the period of MM/DD/YY- MM/DD/YY. Total shall not exceed $125,000.00. 703 characters remaining			
Commodity Code	RO-SUB2 - Research Office Subawards >$25K - to be used on Subaward form only, not to			

Edit the Unit Price and Description on line 2. When complete, click **Save on Change Request**.

☑ Acknowledged

❮ Previous | Save on Change Request | Next ❯

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Shop ▸ Shopping ▸ View Forms

‹ Back to Change Request

Subaward Request

Form Number	**684784**
Purpose	**Procurement Request**
Status	**On Document**

- Instructions
- Suppliers
- Attachments
- **Form Fields**
- Review and Submit

Form Fields - Subaward

Request Actions | History | ?

★ Response Is Required

Subaward Details

Please complete the following fields as outlined below:

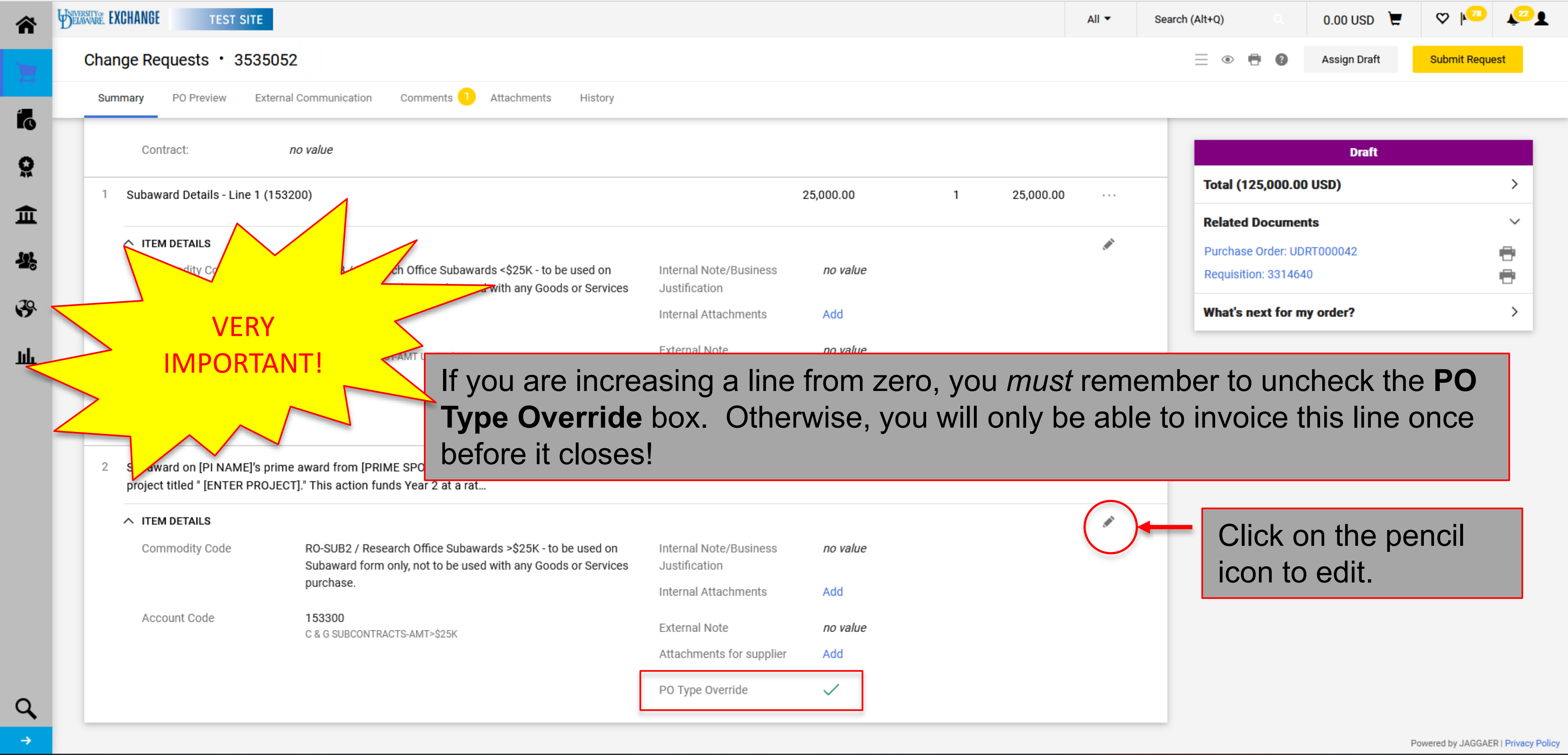
- **Total Amount** *(Unit Price)*: Equals funding for the first budget period; split between Line 1 & Line 2 based on total amount of the award; dependent on total amount and if overhead is being charged.
- **Subaward Description/Comments** *(Product Description)*: Details of the subaward. Please leverage the following format.

  Subaward on **[PI NAME]**'s prime award from **[PRIME SPONSOR]** project titled " **[ENTER PROJECT]**." This action funds Year **XX** at a rate of **$XXXXXX.00**. The sub recipient shall perform the work in accordance with the statement of work for the period of **MM/DD/YY- MM/DD/YY**. Total shall not exceed **$XXX,XXX.00**.

- All invoices are required to be received electronically at subaward-invoices@udel.edu.
- THIS IS AN OFFICE OF SPONSORED RESEARCH SUB RECIPIENT AND THE VENDOR SHOULD NOT RECEIVE A COPY OF THE PURCHASE ORDER; by design, the resulting PO won't be sent to the supplier.
- The original agreement and statement of work are in OSP.

When all edits to the form are complete, click on **Back to Change Request** in the top left of the form.

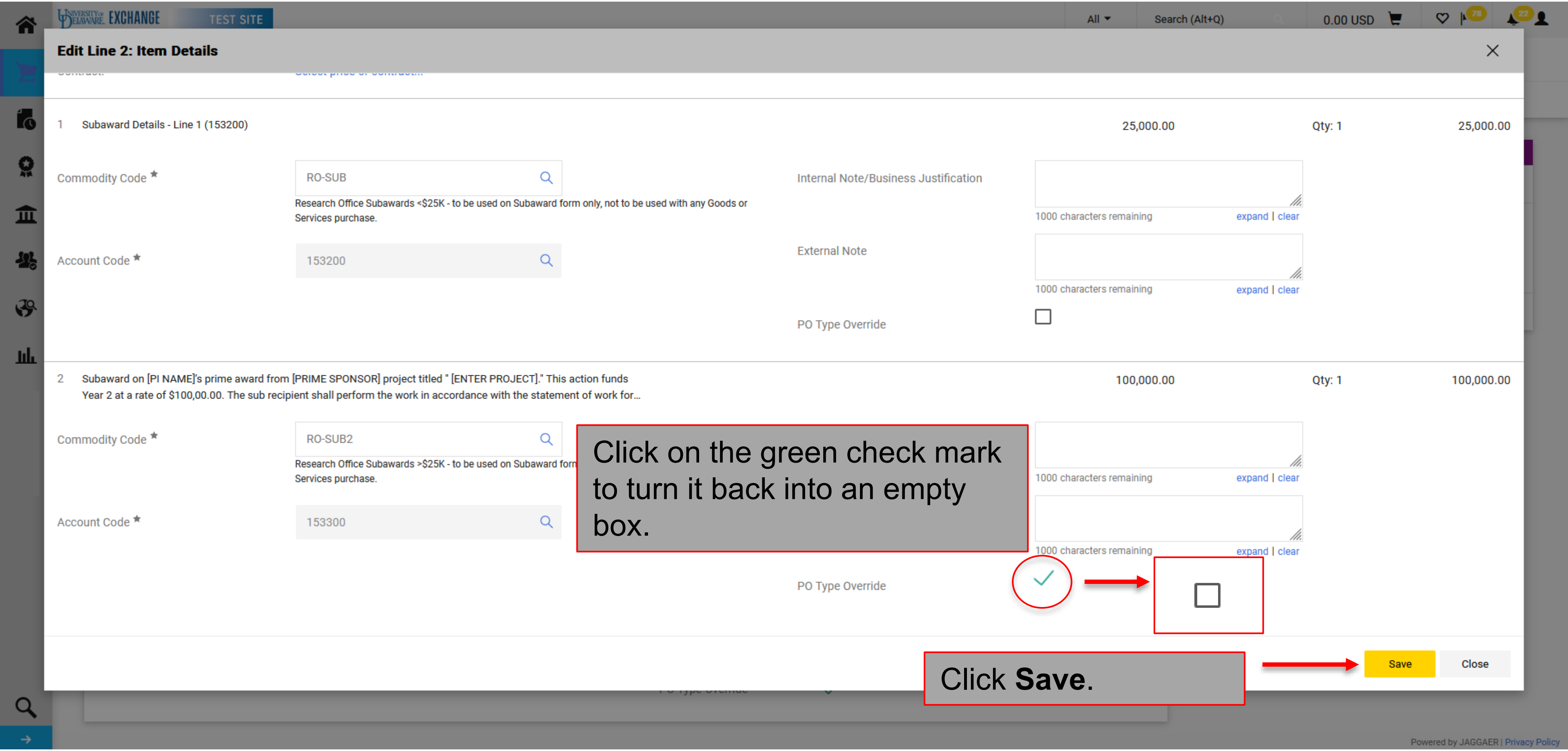
‹ Previous | Save on Change Request | Next ›



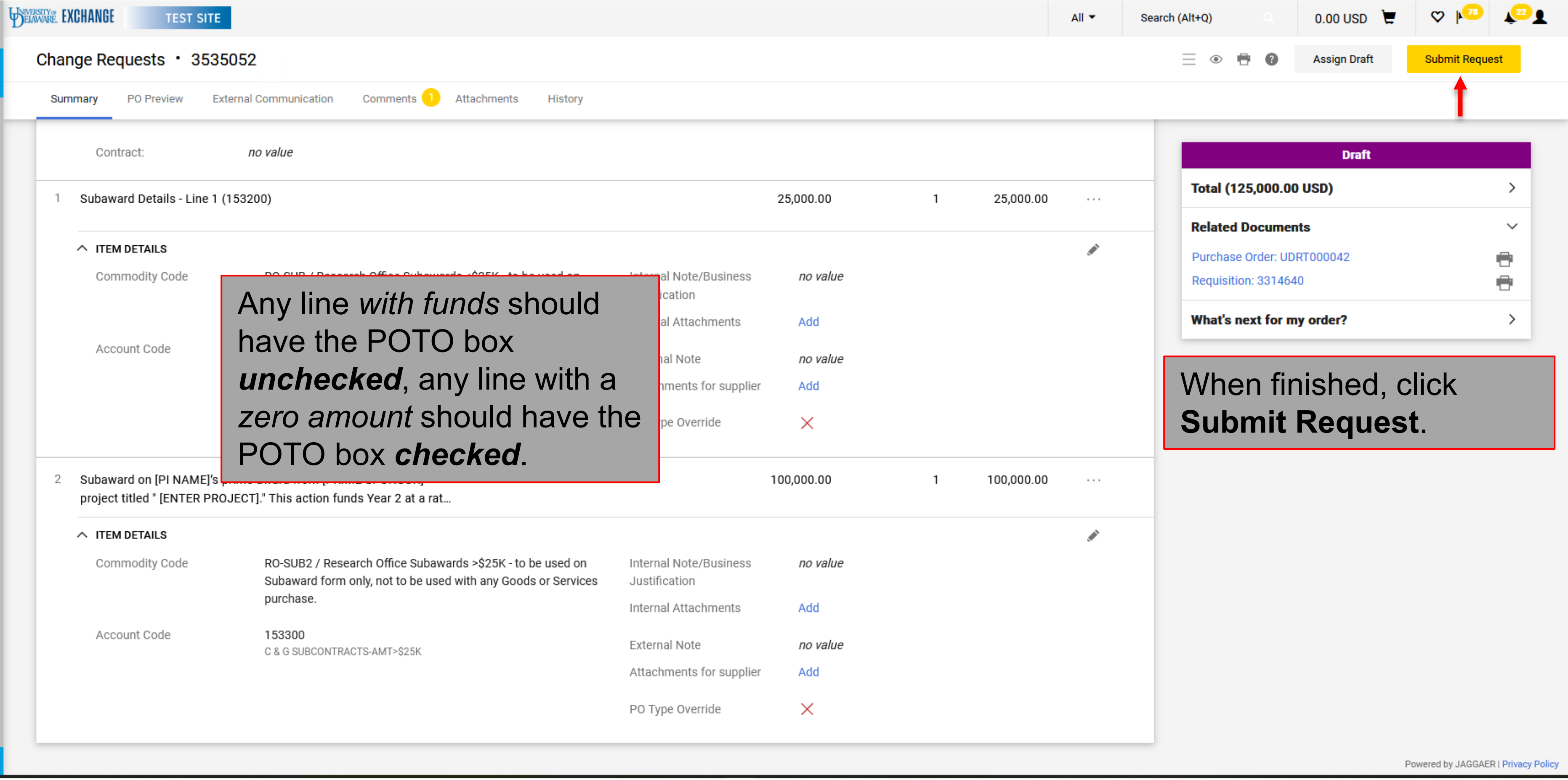
VERY IMPORTANT!

If you are increasing a line from zero, you *must* remember to uncheck the **PO Type Override** box. Otherwise, you will only be able to invoice this line once before it closes!

Click on the pencil icon to edit.



UNIVERSITY OF DELAWARE



Any line *with funds* should have the POTO box ***unchecked***, any line with a *zero amount* should have the POTO box ***checked***.

When finished, click **Submit Request**.

UNIVERSITY of DELAWARE EXCHANGE TEST SITE

All | Search (Alt+Q) | 0.00 USD

Change Requests • 3535052

Withdraw Change Request

Summary | PO Preview | External Communication | Comments 1 | Attachments | History

Contract: *no value*

1	Subaward Details - Line 1 (153200)	25,000.00	1	25,000.00	···

ITEM DETAILS

Commodity Code	RO-SUB / Research Office Subawards <$25K - to be used on Subaward form only, not to be used with any Goods or Services purchase.	Internal Note/Business Justification	*no value*
		Internal Attachments	
Account Code	153200 C&G SUBCONTRACT-AMT UP TO $25K	External Note	*no value*
		Attachments for supplier	
		PO Type Override	✕

2	Subaward on [PI NAME]'s prime award from [PRIME SPONSOR] project titled " [ENTER PROJECT]." This actio...	**100,000.00**	1	100,000.00	···

ITEM DETAILS

Commodity Code	RO-SUB2 / Research Office Subawards >$25K - to be used on Subaward form only, not to be used with any Goods or Services purchase.	Internal Note/Business Justification	*no value*
		Internal Attachments	
Account Code	153300 C & G SUBCONTRACTS-AMT>$25K	External Note	*no value*
		Attachments for supplier	
		PO Type Override	✕

Pending

Total (125,000.00 USD)

Related Documents

Purchase Order: UDRT000042

Requisition: 3314640

What's next?

Approvers will see the increased amount highlighted when they review.

Change Request for a Funding Change

EXCHANGE TEST SITE

All | Search (Alt+Q) | 0.00 USD

Purchase Order • UDRT000050 Revision 3

Status | Summary | Revisions 4 | Confirmations | Shipments | Change Requests 2 | Receipts | Vouchers 1 | Comments 1 | Attachments | History

Records found: 1, Totaling: 1,600.00 USD

Voucher No.	Supplier Voucher No.	Voucher Date	Due Date	Voucher Type	Payment Status	Voucher Total	Invoiced By
IT000954	invoice1	3/10/2022	4/9/2022	Voucher	Payable	1,600.00 USD	Pickering, Kristen

Line Details

Line No.	Product Name	Catalog No.	Unit Price	Qty/UOM	Extended Price	Voucher Qty/Cost	Status
1	First and second year award		25,000.00 USD	1	25,000.00 USD	**n/a / 23,400.00 USD** **n/a / 1,600.00 USD**	**Open Net Invoiced**
2	Second year award		1,500.00 USD	1	1,500.00 USD	**n/a / 1,500.00 USD** **n/a / 0.00 USD**	**Open Net Invoiced**

Completed

Details

Supplier Status

New Order

Supplier

MARYLAND UNIV OF - EASTERN SHORE

Total (26,500.00 USD)

Subtotal 26,500.00

26,500.00

Related Documents

Requisition: 3356902

Change Requests: 3523002

Change Requests: 3363250

Voucher: IT000954

What's next?

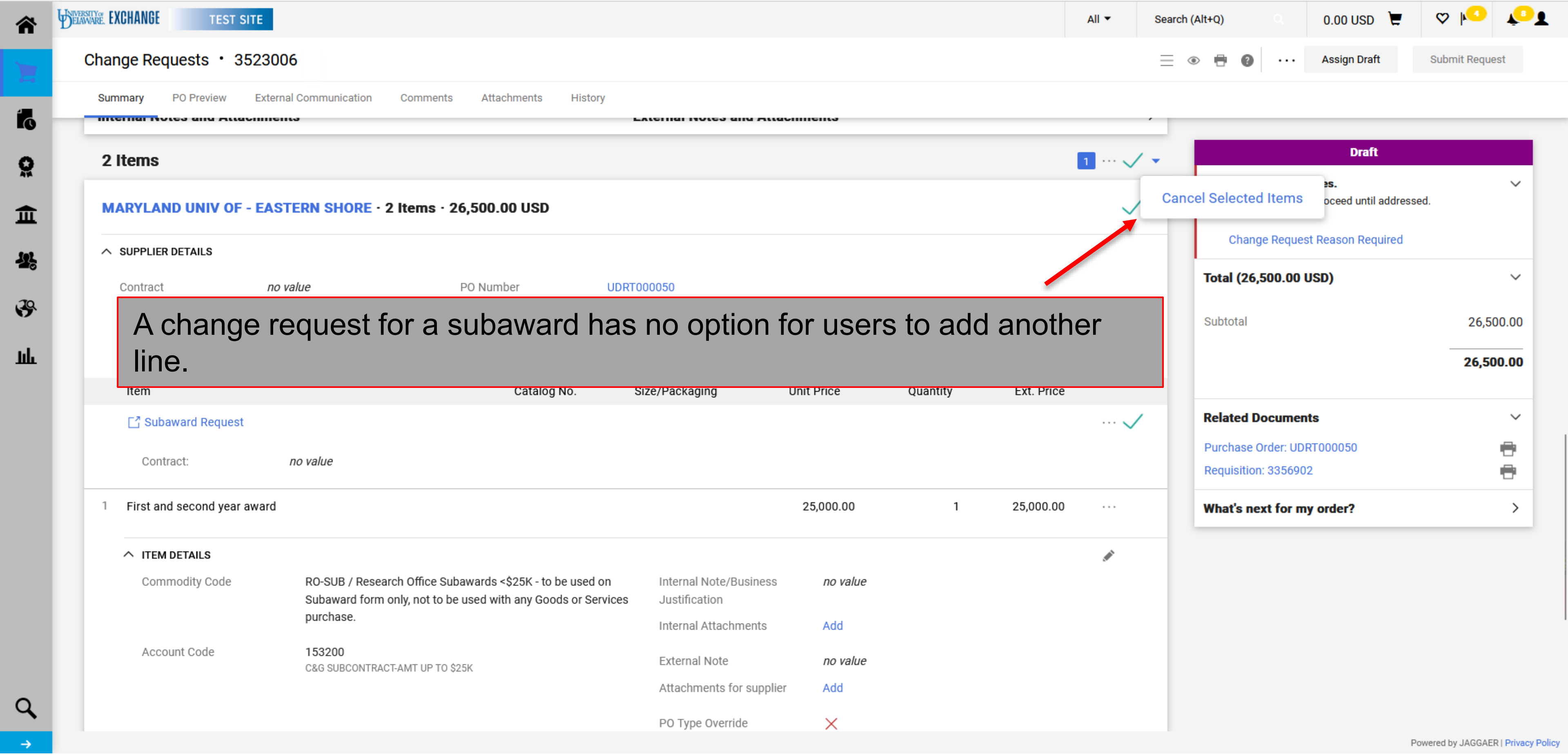
Scenario:

This subaward has had a funding change.

The only invoice is against line 1 overhead, but because it has been invoiced, we cannot override the line's funding.

Line 2 can be changed with no issue.

UNIVERSITY OF DELAWARE



EXCHANGE
TEST SITE
All
Search (Alt+Q)
0.00 USD
Change Requests • 3523006
Assign Draft
Submit Request
Summary
PO Preview
External Communication
Comments
Attachments
History
2 Items
Cancel Selected Items
MARYLAND UNIV OF - EASTERN SHORE · 2 Items · 26,500.00 USD
SUPPLIER DETAILS
Contract
no value
PO Number
UDRT000050
A change request for a subaward has no option for users to add another line.
Item
Catalog No.
Size/Packaging
Unit Price
Quantity
Ext. Price
Subaward Request
Contract:
no value
1
First and second year award
25,000.00
1
25,000.00
ITEM DETAILS
Commodity Code
RO-SUB / Research Office Subawards <$25K - to be used on Subaward form only, not to be used with any Goods or Services purchase.
Account Code
153200
C&G SUBCONTRACT-AMT UP TO $25K
Internal Note/Business Justification
no value
Internal Attachments
Add
External Note
no value
Attachments for supplier
Add
PO Type Override
Draft
oceed until addressed.
Change Request Reason Required
Total (26,500.00 USD)
Subtotal
26,500.00
26,500.00
Related Documents
Purchase Order: UDRT000050
Requisition: 3356902
What's next for my order?
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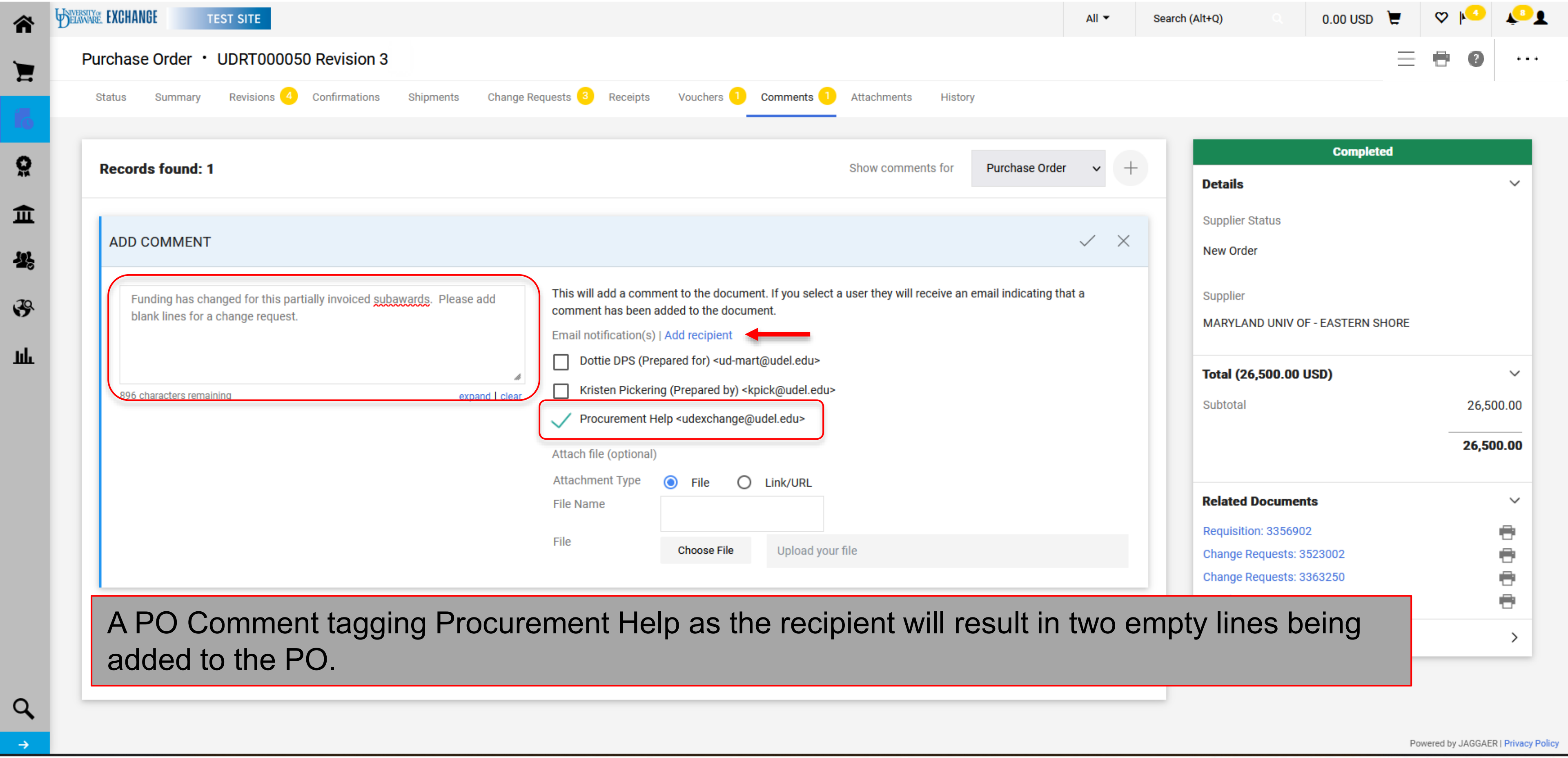
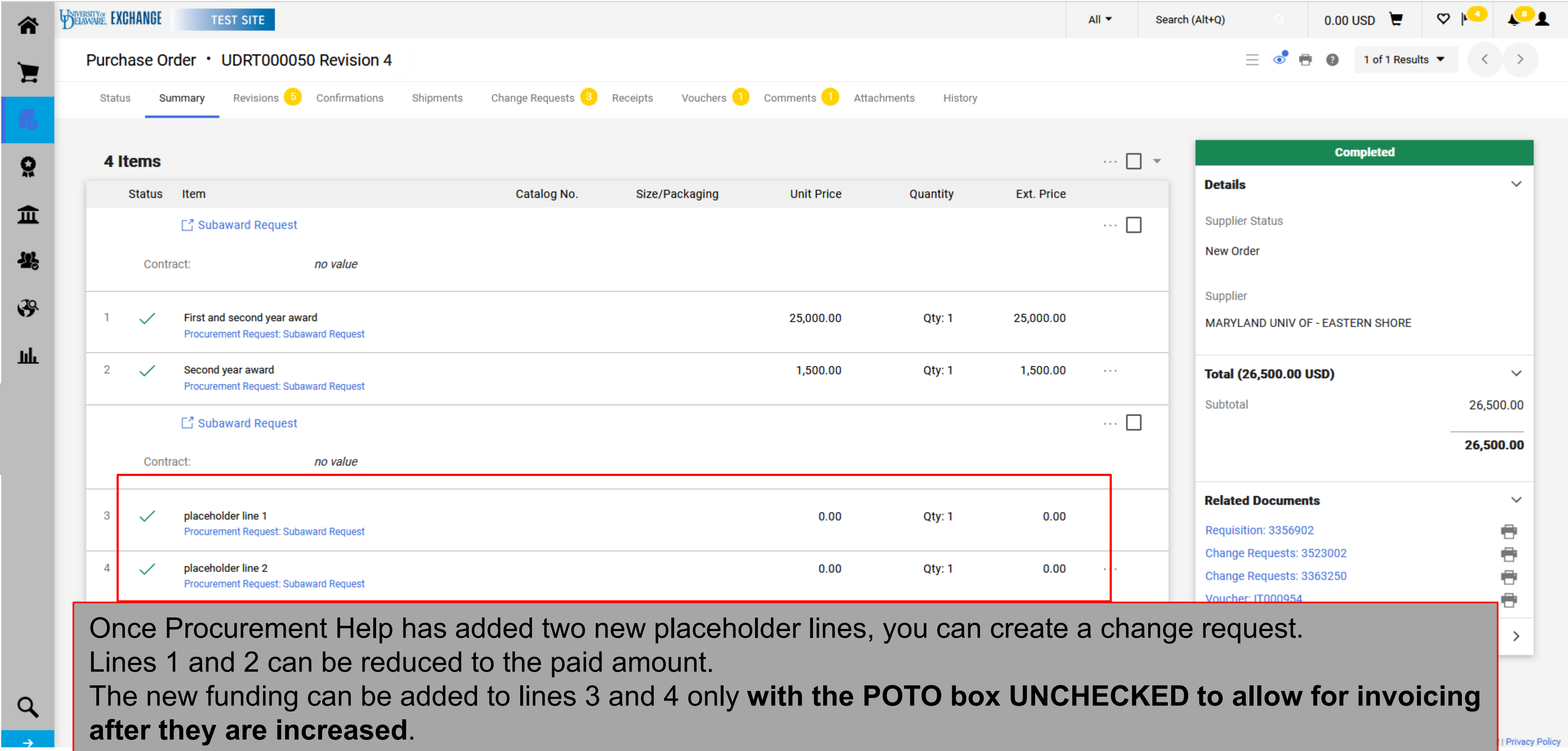


A PO Comment tagging Procurement Help as the recipient will result in two empty lines being added to the PO.



Once Procurement Help has added two new placeholder lines, you can create a change request.
Lines 1 and 2 can be reduced to the paid amount.
The new funding can be added to lines 3 and 4 only **with the POTO box UNCHECKED to allow for invoicing after they are increased**.

Questions:

- procurement@udel.edu

Resources:

- Procurement Services Website
- Adding Financial Information to Requisitions
- Introducing the Purchase Order Type Override (POTO Box)