



Completing the Subaward Form & Subaward Change Requests

Last Updated 7/26/2023



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:

- How to complete the subaward form (slide 3)
- Retrieving a saved form (slide 23)
- Creating subawards with more than two lines (slide 24)
- Subaward Change Requests (slide 31)
 - Change Request for a date extension (slide 32)
 - Change Request for a funding increase (slide 41)
 - Change Request for a funding change (slide 53)



UNIVERSITY OF DELAWARE EXCHANGE

TEST SITE

Requisitions

Search (Alt+Q)

500.00 USD

28

2

Shop

Shopping Home Page

Organizations

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

Here you'll find the goods and services you need. The greatly expanded **University of Delaware Exchange** provides a familiar online shopping experience and negotiated pricing from UD's preferred suppliers. You can search for items by keyword or item number. When you find the item you need, just put it in your shopping cart, and assign or submit. If you can't find what you need, click on the Non-Catalog Item link, complete the form, and assign or submit.

Please note: As you use this site for training and testing, you may see small differences from guides and the production site. This is where the administrators test new solutions before moving to production and while building new guides. Please email procurement@udel.edu if you have specific questions; chances are we are working on it!

Quick Links

[UD Exchange How To Guides](#)
[How Do I Buy _____ ???](#)
[Commodity Code-Account Crosswalk](#)
[Non-PO Payment Matrix](#)
[Non-Catalog Item](#)
[Request New Supplier](#)

My Resources

My Resources

[Product Release Library](#) | procurement@udel.edu
[Site Map](#)

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

Click **Subaward Request**

Procurement Forms

Non-PO Payment Request

Subaward Request

NIIMBL Subaward Request

RFX Request (Option 2)

Waiver of Bid Request

Draft Carts

All Drafts

Number	Cart	Cart Type	Date	Total
3328462	Performance Space UDX	My Drafts	8/29/2021	500.00 USD
3328453	2021-08-28	My Drafts	8/28/2021	2,852.00 USD
3328425	2021-08-27 twood 01	My Drafts	8/27/2021	40,000.00 USD
3324668	August Martin Lab	My Drafts	8/25/2021	10,000.00 USD
3324646	non-catalog test - CR	My Drafts	8/24/2021	9,880.00 USD

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EXCHANGE

TEST SITE

All ▾

Search (Alt+Q) 🔍

23,000.00 USD 🛒

🏠

📧

👤

Shop ▸ Shopping ▸ View Forms

⬅ Back to Shopping Home

Subaward Request

Form Number623183

PurposeProcurement Request

StatusIncomplete

Instructions

Suppliers✔

Attachments✔

Form Fields✔

Review and Submit

Instructions

Request Actions ▾ | History | ?

UNIVERSITY OF DELAWARE

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**.



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

Suppliers

Request Actions ▾ | History | ?

Supplier Please select a fulfillment center below.

Search Registered Suppliers

Supplier

Relationship ▾

Zip Code Within ▾

[Clear](#) ➔

◀ Previous

Next ▶

Enter Supplier information.
Click **Search**.

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

Suppliers

Request Actions ▾ | History | ?

Supplier [APTIM FEDERAL SERVICES LLC](#)
MAIN: 1725 DUKE STREET SUITE 400, ALEXANDRIA, Virginia
22314-0000 United States

▶ Modify Search

Supplier Name	Doing Business As	Fulfillment Centers	Action
 APTIM FEDERAL SERVICES LLC		MAIN: (preferred) 1725 DUKE STREET SUITE 400, ALEXANDRIA, Virginia 22314-0000 United States	✓ Selected

◀ Previous

Next ▶

After you have clicked **Select** on the correct location:
The Supplier fulfillment center will populate at the top of the page.
Click **Next**.



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EXCHANGE

TEST SITE

All

Search (Alt+Q)

23,000.00 USD

Shop

Shopping

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Subaward Request

Form Number623183

PurposeProcurement Request

StatusIncomplete

Instructions

Suppliers

Attachments

Form Fields

Review and Submit

Attachments

Request ActionsHistory?

Please add your attachments below.

Add Attachment

PreviousSave ProgressNext

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



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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

Attachments

Request Actions ▾ History ?

Please add your attachments below.

Add Attachment

Add Attachment

Attachment * No File Attached

* Required

Save Changes

Close

Save Progress

Next ▸

Click **Upload** to attach the item.



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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

Attachments

Request Actions ▼ History ?

Please add your attachments below.

Add Attachment

Upload

Title ★ 1

File ★ PCDWdemo.pdf 2
Maximum upload file size: 25.0 MB

★ Required 3

Save Progress Next ▶

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



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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

Attachments

Request Actions History

Please add your attachments below.

Add Attachment

Add Attachment

Attachment * PCDW Upload

* Required

Save Changes

Close

Save Progress

Next

Click **Save Changes** again.



UNIVERSITY OF DELAWARE EXCHANGE

TEST SITE

All ▾

Search (Alt+Q)

23,000.00 USD

1

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

Attachments

#

Attachment

1

PCDW

Add Attachment

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

Request Actions ▾

History

?

Edit ▾

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 [P 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 XXXX.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.

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

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.

Subaward Details - Line 1 (153200)

Unit Price

23000

USD

Quantity

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.

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

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).

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.

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TEST SITE

All

Search (Alt+Q)

23,000.00 USD

Shop > Shopping > View Forms

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

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

• Product Description = Subaward description/comments

Subaward Details - Line 2 (153300)

Unit Price

0

Quantity

1

Total

0.00 USD

Product Description

Placeholder

989 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.

Prior to submitting this request for approval, I will mark the cart for "Multi-Invoice/Payment". *

☒ 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 Progress

Next

When complete, click **Next**.

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Shop

Shopping

View Forms

Back to Shopping Home

Subaward Request

Form Number623183

PurposeProcurement Request

StatusIncomplete

Instructions

Suppliers

Attachments

Form Fields

Review and Submit

Review and Submit

Required Fields Complete

Section	Progress
Suppliers	Required Fields Complete
Attachments	Required Fields Complete
Form Fields	Required Fields Complete

Previous

Add to Favorites

Add and go to Cart

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.

Add and go to Cart

Save to Cart and Add Another

Add to Cart and Return

Add to new Cart

Add to Draft Cart or Pending PR/PO

Add to PO Revision

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**.

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TEST SITE

All

Search (Alt+Q)

23,000.00 USD

Shopping Cart • Shopping Cart

SimpleAdvanced

Search for products, suppliers, forms, part number, etc.

Cart NameAptim Subaward

Name your cart.

Description

Multi-Invoice/Payment

Check the Multi-Invoice/Payment box.

Details

ForSam Shopper

Estimate (23,000.00 USD)

Subtotal

23,000.00

Total

23,000.00

USD

2 Items

APTIM FEDERAL SERVICES LLC • 2 Items • 23,000.00 USD

SUPPLIER DETAILS

Contractno value

PO NumberTo Be Assigned

Quote number

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
<div>Subaward Request</div> <div>Contract:</div>					

Scroll down to the line items section..

Shopping Cart • Shopping Cart

1	Subaward on [PI NAME]'s prime award from [PRIME SPONSOR] project titled "[ENTER PROJECT]." This action funds Year XX at a rate of... Procurement Request: Subaward Request	23,000.00	Qty: 1	23,000.00
<div>ITEM DETAILS</div> <div><div>Commodity Code</div><div>RO-SUB 🔍 Research Office Subawards <\$25K - to be used on Subaward form only, not to be used with any Goods or Services purchase.</div></div> <div><div>Internal Note/Business Justification</div><div><div></div><div>1000 characters remaining</div><div>expand clear</div></div></div> <div><div>External Note</div><div><div></div><div>1000 characters remaining</div><div>expand clear</div></div></div> <div><div>PO Type Override</div><div><input type="checkbox"/></div></div>				
2	Placeholder Procurement Request: Subaward Request	0.00	Qty: 1	0.00
<div><div>PO Type Override</div><div><input checked="" type="checkbox"/></div></div>				

Details ▾

For
[Sam Shopper](#)

Estimate (23,000.00 USD) ▾

Subtotal

23,000.00

Total

23,000.00 USD

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.



Shopp

Assign Cart

Proceed To Checkout

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.

3,000.00 USD)

23,000.00

23,000.00 USD

PO Type Override

1000 characters remaining

[expand](#) | [clear](#)

2 Placeholder

[Procurement Request: Subaward Request](#)

0.00

Qty: 1

0.00

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

1000 characters remaining

[expand](#) | [clear](#)

External Note

1000 characters remaining

[expand](#) | [clear](#)

PO Type Override



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EXCHANGE

TEST SITE

All

Search (Alt+Q)

23,000.00 USD

Requisition • 3371264

Summary

PO Preview

Comments

Attachments

History

General

Cart Name

Aptim Subaward

Description

no value

Priority

Normal

Prepared by

Sam Shopper

Prepared for

Sam Shopper

Purchasing Business Unit

UOD01
UNIVERSITY OF DELAWARE

eBuilder Process Instance

no value

Multi-Invoice/Payment

✓

Shipping

Ship To

no address
Required

Delivery Options

Expedite

Ship Via

Requested Delivery D

Buyer Information

User does not have the necessary permissions to view the custom fields associated with

Accounting Codes

Work Order Number	SpeedType	Purpose	Fund	Dept	Program	Source	Project ID	User Ref	Cost Share Project
N/A	no value	no value	no value	no value	no value	no value	no value	no value	no value

Edit General

General

Cart Name *

Aptim Subaward

Description

Priority

Normal

Prepared by

Sam Shopper

Prepared for

Sam Shopper

Purchasing Business Unit *

UOD01

eBuilder Process Instance

Multi-Invoice/Payment

✓

★ Required fields

Save

Close

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.

Next Step

Wait for Validation Response

Approvers

There are no approvers

Workflow

Draft

Active

Sam Shopper

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Requisition • 3371264

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.	Internal Note/Business Justification	no value		
Account Code	153200 C&G SUBCONTRACT-AMT UP TO \$25K	Internal Attachments	Add		
		External Note	no value		
		Attachments for supplier	Add		
		PO Type Override	✗		
2	Placeholder	0.00	1	0.00	...

purchase.

Account Code 153300
C & G SUBCONTRACTS-AMT>\$25K

Internal Attachments Add

External Note no value

Attachments for supplier Add

PO Type Override ✓

You will see that the lines on the subaward automatically direct to the correct account code to be used for each.

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



Purchase Order • UDR0000010 Revision 1

Status Summary Revisions 2 Confirmations Shipments Change Requests Receipts Vouchers Comments Attachments 6 History

General Information

PO/Reference No. UDR0000010
Revision No. 1
Supplier Name APTIM FEDERAL SERVICES LLC
Purchase Order Date 7/22/2020
Total 166,245.00
Owner Name Coleen Bristow
Owner Phone +1 302 838 1234
Owner Email bristowc@udel.edu
Requisition Number 3019196 view | print

Document Status

PO Status Open
Workflow ✓ Completed
(7/22/2020 10:44 PM)

Once the requisition has received all approvals, subawards create a PO number prefaced by **UDR** for “UD Research.”
Subawards **do not** get sent to the supplier in PO workflow.

Line Details

Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 ✓	Subaward Request Procurement Request: Subaward Request			25,000.00	1	25,000.00
^ DETAILS						
		Supplier	Receiving	Invoicing	Matching	

Completed

Details

Supplier Status
New Order

Supplier
APTIM FEDERAL SERVICES LLC

160,500.00 USD)
166,245.00
166,245.00

Related Documents

Requisitions: 3019196

What's next?

Workflow Status Completed

Workflow

Submitted
7/22/2020 10:33 PM
Coleen Bristow

Assign Subaward PO Number



Retrieving a Saved Form

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

The screenshot shows the University of Delaware Exchange interface. The top navigation bar includes the University of Delaware logo, the word "EXCHANGE", and a "TEST SITE" button. Below this, a breadcrumb trail reads "Orders > Search > Procurement Requests". The main heading is "Search Procurement Requests". A sidebar menu on the left contains icons for Home, Shopping Cart, Orders, Search, My Orders, Approvals, and a bar chart. The "Orders" menu is expanded, showing a list of options: "All Orders", "Requisitions", "Purchase Orders", "Change Requests", "Procurement Requests" (highlighted with a red arrow), "Vouchers", and "Receipts".

The screenshot shows the "Search Procurement Requests" results page. The breadcrumb trail is "Orders > Search > Procurement Requests". The page title is "Search Procurement Requests". There are filters for "Quick Filters" and "My Searches". The "Form Status" filter shows "Incomplete" with a count of 4. The "Form Purpose" filter shows "Procurement Request" with a count of 4. The "Form Type" filter shows "Purchase Request" with a count of 3 and "Sole Source" with a count of 1. The "Participant" filter shows "Requester, Test2500" with a count of 4. The "Requestor" filter shows "Requester, Test2500" with a count of 4. A table of results is displayed with columns: Form Name, Request Number, Form Purpose, Form Status, Created Date/Time, and Current User. The table contains five rows of data, all with a status of "Incomplete". A red arrow points to the "Subaward Request" row with Request Number 461964.

Form Name	Request Number	Form Purpose	Form Status	Created Date/Time	Current User
<input type="checkbox"/> Non-PO Payment Request	463283	Procurement Request	Incomplete	7/17/2020 4:24:46 PM	-
<input type="checkbox"/> Subaward Request	462590	Procurement Request	Incomplete	7/16/2020 12:13:08 PM	-
<input type="checkbox"/> Waiver of Bid Request	462042	Procurement Request	Incomplete	7/15/2020 2:25:44 PM	-
<input type="checkbox"/> Subaward Request	461964	Procurement Request	Incomplete	7/15/2020 11:37:30 AM	-

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.



Shop > Shopping > View Forms

[Back to Shopping Home](#)

Subaward Request

Form Number **684786**
Purpose **Procurement Request**
Status **Incomplete**

Instructions

Suppliers ✓
Attachments ✓
Form Fields ✓

Review and Submit

Review and Submit

Request Actions History ?

✓ Required Fields Complete

Section	Progress
Suppliers	✓ Required Fields Complete
Attachments	✓ Required Fields Complete
Form Fields	✓ Required Fields Complete

[Previous](#) [Add to Favorites](#) [Add and go to Cart](#)

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”**

→

Add and go to Cart

Save to Cart and Add Another

Add to Cart and Return

Add to new Cart

Add to Draft Cart or Pending PR/PO

Add to PO Revision

Shop > Shopping > View Forms

Back to Manage Forms

Subaward Request

Form Number684786PurposeProcurement RequestStatusIncomplete

Instructions

Suppliers✓

Attachments✓

Form Fields✓

Review and Submit

Instructions

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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)

Request Actions

History

Success

Form added to cart successfully

Each Save to Cart and Add Another action adds the item to the cart.

25,000.00 USD

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.

Next

UNIVERSITY OF DELAWARE

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Unit Price	<input type="text" value="0"/> USD	Quantity	1	Total	25,000.00 USD
Product Description	<div>Year 2 - do not use</div> <div>981 characters remaining</div>				
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	<input type="text" value="0.00"/> USD	Quantity	1	Total	0.00 USD
Product Description	<input type="text" value="Year 2 Placeholder"/>				

[< Previous](#) [Save Progress](#) [Next >](#)



Shop ▸ Shopping ▸ View Forms

◀ Back to Manage Forms

Subaward Request

Form Number **684786**
Purpose **Procurement Request**
Status **Incomplete**

Instructions
Suppliers ✓
Attachments ✓
Form Fields ✓

Review and Submit

Review and Submit

Request Actions ▾ | History | ?

✓ Required Fields Complete

Section	Progress
Suppliers	✓ Required Fields Complete
Attachments	✓ Required Fields Complete
Form Fields	✓ Required Fields Complete

◀ Previous

Add to Favorites

Add and go to Cart ▾

Repeat this as needed.

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





Shopping Cart • Shopping Cart



Assign Cart

Proceed To Checkout

1	Year 1 Funding Procurement Request: Subaward Request	25,000.00	Qty: 1	25,000.00
▼ ITEM DETAILS				
2	Placeholder Procurement Request: Subaward Request	0.00	Qty: 1	0.00
▼ ITEM DETAILS				
Subaward Request ... <input type="checkbox"/>				
Contract:				
3	Year 2 - do not use Procurement Request: Subaward Request	0.00	Qty: 1	0.00
▼ ITEM DETAILS				
4	Year 2 Placeholder Procurement Request: Subaward Request	0.00	Qty: 1	0.00
^ ITEM DETAILS				
Commodity Code <input type="text" value="RO-SUB2"/> <input type="button" value="Q"/>				
Research Office Subawards >\$25K - to be used on Subaward form or to be used with any Goods or Services purchase.				
1000 characters remaining expand clear				
PO Type Override <input checked="" type="checkbox"/>				

Details ▾

For
Dottie DPS

Estimate (25,000.00 USD) ▾

Subtotal * **25,000.00**

Total * **25,000.00** USD

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!





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



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				
<div>Scenario: This subaward needs to be updated to reflect a <i>date extension</i>. This change request is only intended to update the date in the description file</div>						
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

Workflow

Show skipped steps

Submitted

2/21/2023 1:33 PM

Margot Martin

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.



Records found: 0

No change requests have been created



- Add Comment
- Create Change Request
- Add Notes to History
- Cancel PO
- Finalize Revision

Open the the Change Requests tab

Click the + Sign

or

Click the ellipsis and choose Create Change Request.

Related Documents

Requisition: 3712409

What's next?

Workflow Status Completed

Workflow Show skipped steps

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



Records found: 0

No change requests have been created

Create Change Request

This will create a change request for this purchase order. If you select a user they will receive an email indicating that a change request has been created for this purchase order.

Email notification(s) | [Add recipient](#)

- ☐ Kristen Pickering (Approved Requisition) <kpick@udel.edu>
- ☐ Margot Martin (Prepared by, Prepared for) <ud-mart@udel.edu>

User with change request permission:

- ☐ Christian Aha (Approved) <ud-mart@udel.edu>
- ☐ Danielle LaSalle (Approved) <dlasalle@udel.edu>
- ☐ Glenda Wilkerson (Approved) <ud-mart@udel.edu>
- ☐ Jennifer Jewell (Approved) <ud-mart@udel.edu>
- ☐ Shelly Powell (Approved) <ud-mart@udel.edu>

[add email recipient...](#)

Change Request Reason

Subaward extended for the period of 10/01/2022-09/30/2023.

941 characters remaining

[expand](#) | [clear](#)

Attach file to this change request (optional):

Attachment Type ☒ File

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**.

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
Related Documents	
Requisition: 3712409	
What's next?	
Workflow Status	Completed
Workflow	
Submitted	
2/21/2023 1:33 PM	
Margot Martin	

Subaward Request

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

Instructions

Suppliers ✓

Attachments ✓

Form Fields ✓

Review and Submit

Instructions

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 non-UD Exchange 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

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**.

- "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	<div>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.</div> <div>503 characters remaining</div>
---------------------	--

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



UNIVERSITY OF DELAWARE EXCHANGE

TEST SITE

All Search (Alt+Q) 0.00 USD Logout

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.

Diane Johnson

Previous Save on Change Request Next

UNIVERSITY OF DELAWARE

39

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UNIVERSITY OF DELAWARE EXCHANGE

TEST SITE

All

Search (Alt+Q)

0.00 USD

76

22

Change Requests • 3535052

Assign DraftSubmit Request

SummaryPO PreviewExternal CommunicationComments1AttachmentsHistory

Contract:
no value

1Subaward Details - Line 1 (153200)25,000.00125,000.00...

ITEM DETAILS

Commodity CodeRO-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 Justificationno value

Internal AttachmentsAdd

Account Code153200
C&G SUBCONTRACT-AMT UP TO \$25K

External Note
Attachments for supplierno value
Add

PO Type Override×

2Subaward on [PI NAME]'s prime award from [PRIME SPONSOR] project titled "[ENTER PROJECT]." This action funds Year 2 at a rat...100,000.001100,000.00...

ITEM DETAILS

Commodity CodeRO-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 Justificationno value

Internal AttachmentsAdd

Account Code153300
C & G SUBCONTRACTS-AMT>\$25K

External Note
Attachments for supplierno value
Add

PO Type Override×

Draft

Total (125,000.00 USD)

Related Documents

Purchase Order: UDRT000042

Requisition: 3314640

What's next for my order?

Click Submit Request.

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UNIVERSITY OF DELAWARE

40

Change Request for a Funding Increase





[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	<div>n/a / 23,000.00 USD</div> <div>n/a / 2,000.00 USD</div>	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.



Records found: 0

No change requests have been created



- Add Comment
- Create Change Request
- Add Notes to History
- Cancel PO
- Finalize Revision

Open the the Change Requests tab

Click the + Sign

or

Click the ellipsis and choose Create Change Request.

Related Documents

Requisition: 3712409

What's next?

Workflow Status Completed

Workflow Show skipped steps

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



Purchase Order • UDRT000042 Revision 1

Status Summary Revisions 2 Confirmations Shipments Change Request

Records found: 0

No change requests have been created

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.

Create Change Request

This will create a change request for this purchase order. If you select a user they will receive an email indicating that a change request has been created for this purchase order.

Email notification(s) | [Add recipient](#)☐ Kristen Pickering (Prepared by, Prepared for) <kpick@udel.edu>

User with change request permission:

☐ Amy Drag (Approved) <ud-mart@udel.edu>☐ Andy Admin (Approved) <nobody@sciquest.com>☐ Sarah Grieb (Approved) <sgrieb@grovesandcompany.com>☐ Sophill Butler (Approved) <sbutler@grovesandcompany.com>☐ Test Buyer (Approved) <ud-mart@udel.edu>[add email recipient...](#)

Change Request Reason

Increase for year 2 funding on line 2

963 characters remaining

[expand](#) | [clear](#)

Attach file to this change request (optional):

Attachment Type ☒ File ☐ Link/URL

Create Change Request

Close

Click **Create Change Request**.

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?



Change Requests • 3535052



Assign Draft

Submit Request

Summary PO Preview External Communication Comments 1 Attachments History

Quote number no value

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
Subaward Request						... □

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	Add

Account Code 153200

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*.

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	Add

Account Code 153300 External Note no value

Draft

Total (25,000.00 USD) >

Related Documents ▾

[Purchase Order: UDRT000042](#)

[Requisition: 3314640](#)

What's next for my order? >



Subaward Request

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

Instructions

Suppliers ✓

Attachments ✓

Form Fields ✓

Review and Submit

Instructions

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 non-UD Exchange 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

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**.

Shop ▶ Shopping ▶ View Forms

- "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	<input type="text" value="100000.00"/>	USD	Quantity	1	Total	0.00 USD
Product Description	<div>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.</div> <div>703 characters remaining</div>					
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 ▶



UNIVERSITY OF DELAWARE
EXCHANGE

TEST SITE

AllSearch (Alt+Q)0.00 USD7522Logout

ShopShoppingView Forms

Back to Change Request

Subaward Request

Form Number684784
PurposeProcurement Request
StatusOn Document

Instructions

Suppliers

Attachments

Form Fields

Review and Submit

Form Fields - Subaward

Request ActionsHistory?

★ 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.

PreviousSave on Change RequestNext





Change Requests • 3535052



Assign Draft

Submit 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	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	Add
		External Note	no value

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!

2 Subaward on [PI NAME]'s prime award from [PRIME SPO] project titled "[ENTER PROJECT]." This action funds Year 2 at a rat...

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	Add
Account Code	153300 C & G SUBCONTRACTS-AMT>\$25K	External Note	no value
		Attachments for supplier	Add
		PO Type Override	✓



Click on the pencil icon to edit.



Edit Line 2: Item Details



1 Subaward Details - Line 1 (153200)

25,000.00

Qty: 1

25,000.00

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

1000 characters remaining

[expand](#) | [clear](#)

Account Code *

153200



External Note

1000 characters remaining

[expand](#) | [clear](#)

PO Type Override



2 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...

100,000.00

Qty: 1

100,000.00

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.

Click on the green check mark to turn it back into an empty box.

1000 characters remaining

[expand](#) | [clear](#)

Account Code *

153300



1000 characters remaining

[expand](#) | [clear](#)

PO Type Override



Click **Save**.



Save

Close



Change Requests • 3535052



Assign Draft

Submit 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

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

Internal Note/Business Justification no value

Internal Attachments Add

Internal Note no value

Attachments for supplier Add

PO Type Override ✗

2	Subaward on [PI NAME]'s [PROJECT NAME] project titled "[ENTER PROJECT]." This action funds Year 2 at a rat...	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 Add

Account Code

153300
C & G SUBCONTRACTS-AMT>\$25K

External Note no value

Attachments for supplier Add

PO Type Override ✗

Draft

Total (125,000.00 USD) >

Related Documents ▾
[Purchase Order: UDRT000042](#)
[Requisition: 3314640](#)

What's next for my order? >

When finished, click **Submit Request**.



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



Records found: 1, Totaling: 1,600.00 USD

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	<div><div>n/a / 23,400.00 USD</div><div>n/a / 1,600.00 USD</div></div>	Open Net Invoiced
2	 Second year award		1,500.00 USD	1	1,500.00 USD	<div><div>n/a / 1,500.00 USD</div><div>n/a / 0.00 USD</div></div>	Open Net Invoiced

Details

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?

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.



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EXCHANGE

TEST SITE

All

Search (Alt+Q)

0.00 USD

4

8

Change Requests • 3523006

Assign Draft

Submit Request

Summary

PO Preview

External Communication

Comments

Attachments

History

2 Items

1

✓

MARYLAND UNIV OF - EASTERN SHORE • 2 Items • 26,500.00 USD

✓

SUPPLIER DETAILS

Contractno valuePO NumberUDRT000050

A change request for a subaward has no option for users to add another line.

ItemCatalog No.Size/PackagingUnit PriceQuantityExt. Price

Subaward Request

Contract: no value

1First and second year award25,000.00125,000.00

ITEM DETAILS

Commodity CodeRO-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 Justificationno value

Internal AttachmentsAdd

Account Code153200C&G SUBCONTRACT-AMT UP TO \$25K

External Note no value

Attachments for supplierAdd

PO Type Override

Draft

Change Request Reason Required

Total (26,500.00 USD)

Subtotal26,500.00

26,500.00

Related Documents

Purchase Order: UDRT000050

Requisition: 3356902

What's next for my order?

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UNIVERSITY OF DELAWARE EXCHANGE

TEST SITE

All

Search (Alt+Q)

0.00 USD

Purchase Order • UDRT000050 Revision 3

Status

Summary

Revisions 4

Confirmations

Shipments

Change Requests 3

Receipts

Vouchers 1

Comments 1

Attachments

History

Records found: 1

Show comments for Purchase Order

ADD COMMENT

Funding has changed for this partially invoiced subawards. Please add blank lines for a change request.

896 characters remaining

expand | clear

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) | Add recipient

☐ Dottie DPS (Prepared for) <ud-mart@udel.edu>

☐ Kristen Pickering (Prepared by) <kpick@udel.edu>

☒ Procurement Help <udexchange@udel.edu>

Attach file (optional)

Attachment Type ☒ File ☐ Link/URL

File Name

File

Choose File

Upload your file

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

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

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Purchase Order • UDRT000050 Revision 4

1 of 1 Results

Status Summary Revisions 5 Confirmations Shipments Change Requests 3 Receipts Vouchers 1 Comments 1 Attachments History

4 Items

Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
	Subaward Request					
	Contract: <i>no value</i>					
1	✓ First and second year award Procurement Request: Subaward Request			25,000.00	Qty: 1	25,000.00
2	✓ Second year award Procurement Request: Subaward Request			1,500.00	Qty: 1	1,500.00
	Subaward Request					
	Contract: <i>no value</i>					
3	✓ placeholder line 1 Procurement Request: Subaward Request			0.00	Qty: 1	0.00
4	✓ placeholder line 2 Procurement Request: Subaward Request			0.00	Qty: 1	0.00

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](#)

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 \(POTO Box\)](#)

