Completing the Subaward Form
What’s different in UD Exchange?

Special Process for Subawards

- In Webforms, a user would have to use the PO Requisition form to create a subaward, and adapt the form to its use.

- In UD Exchange, a special form only for subawards exists so that workflow is followed. Subawards also get special PO numbers to identify them.
Subaward Request

- Complete the Subaward form if you need to 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.
From the Shopping Home page, scroll to Procurement Forms at the bottom of the Catalog and Forms Showcase.

Click **Subaward Request**

Forms can also be accessed from the Shopping>View Forms menu.
Read the Subaward Definition. If your project is being Federally funded and you have determined this purchase is a Subaward, click Next.
1. Enter Supplier Information.
2. Click Search.
After you have clicked **Select** on the correct location:
1. Supplier fulfillment center will populate at the top of the page.
2. 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 file.
3. Click **Save Changes**.
Click **Save Changes** again.
Repeat as needed for all documents. Click **Next** when finished.
Use the information on this page as a template for completing the subaward detail. Type in the name of your Department Grant Administrator.
1. Enter the details for the **Overhead** on line 1 using the template provided.

2. Following the instructions, continue down to complete the details for line 2.
1. For subawards greater than $25K, the **Unit Price** on **Line 2** should be the balance of total funds less the $25K allotted for overhead (Line 1).

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

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

4. When complete, click **Next**.
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**.

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.
1. Name your cart.

<table>
<thead>
<tr>
<th>Cart Name</th>
<th>Aptim Subaward</th>
</tr>
</thead>
</table>

2. Check the Multi-Invoice/Payment box.

3. Scroll down to the lines.

<table>
<thead>
<tr>
<th>Item</th>
<th>Catalog No.</th>
<th>Size/Packaging</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Ext. Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subaward Request</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contract</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
1. If you have a zero dollar line, click on the **PO Type Override** box for that line. This is necessary for successful sync to PeopleSoft.

2. Click **Proceed to Checkout** to add details and funding and submit the Request, or click **Assign Cart** to submit it to another Requester for review (continues on next page).
If you are not the PI:
1. Click edit (Pencil Icon) under General section to name the PI as the “Prepared For” user. This will be the PO Owner responsible for approving invoices.
2. Click “Magnifying Glass” under Prepared for and choose the PI in the pop-up.
3. Click Save.
The lines on the subaward automatically direct to the correct account code to be used for each.
Subawards create a PO number prefaced by UDR for “UD Research.”

Subawards do not get sent to the supplier in PO workflow.
Retrieving a Saved Form

1. If you saved a draft by clicking “Save Progress” and left the form, go to Orders>Search>Procurement Requests to retrieve it.

2. There you will find all draft form requests not yet added to shopping carts to be made requisitions.
Resources

Procurement Services
procurement@udel.edu
See also, “Adding Financial Information to Requisitions” and “Introducing the Purchase Order Type Override (POTO Box)”