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 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**.
<table>
<thead>
<tr>
<th>Subaward Request</th>
</tr>
</thead>
<tbody>
<tr>
<td>Form Number: 623183</td>
</tr>
<tr>
<td>Purpose: Procurement Request</td>
</tr>
<tr>
<td>Status: Incomplete</td>
</tr>
</tbody>
</table>

**Attachments**

*Please add your attachments below.*

- Add Attachment

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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 **first $25k (or less)** on line 1 using the template provided.

2. Following the instructions, continue down to complete the details for line 2.
If the subaward is less than $25,000, the entire amount will be on line one, but instructions are provided for a placeholder if it needs to be increased in the future (shown below).

1. For subawards greater than $25K, the Unit Price on Line 2 should be the balance of total funds less the $25K allotted for 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.

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

3. Scroll down to the lines.
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 the Magnifying Glass icon 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

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

There you will find all draft form requests not yet added to shopping carts to be made requisitions.
Creating Subawards with multiple 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 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 41-44 for this process.
To add multiple lines to your subaward, proceed as usual for year 1. 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 for editing.
Navigate to the Form Fields and edit your lines for placeholders. Every form must contain two lines but they need not be funded.
Repeat this as needed. When complete with all placeholder lines, choose Add and Go to Cart.
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!
Once the PO is complete, only the funded lines will be invoiced. Open, zero dollar lines will allow for change requests and prevent the PO from closing. Proceed with slides 29-40 to create a change request.
Subaward Change Requests

• If a subaward later needs to be changed or increased, the simplest way is to edit the verbiage or amount on the form itself.
• If funding changes are required after the line has been vouchered, the line cannot be changed and the balance must be moved to a new line.
• The following slides depict change requests to subawards in various situations.
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.
To begin, either click the + Sign on the Change Requests Tab or choose “Create Change Request” from the Dropdown (Requesters and DPSes only).
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.
Scroll down to the line items. Note you will not be able to change the price or description from this screen. You will have to click on the blue **Subaward Request** link above the line items to make edits on the subaward form.
You now have the ability to edit the items on your subaward from the form you entered when you created it. Use the Next button or the menu items on the left to navigate to edit Form Fields.
Edit the Unit Price and Description on line 2. When complete, click Save on Change Request.
When all edits to the form are complete, click on **Back to Change Request** in the top left of the form.
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!

**VERY IMPORTANT!**

Click on the pencil icon to edit.
Click on the green check mark to turn it into an empty box.

Click Save.
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.
Approvers will see the increased amount highlighted when they review.
This subaward has had a funding change. The only invoice is against line 1 (overhead bearing expenditures), but because it has been invoiced, we cannot override the line's funding. Line 2 can be changed with no issue.
A change request for a subaward has no option for users to add another line.
A PO Comment tagging Procurement Help 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.
Resources

Procurement Services
procurement@udel.edu

See also, “Adding Financial Information to Requisitions” and “Introducing the Purchase Order Type Override (POTO Box)”