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

2. Click **Save Progress**.
   - Repeat as needed for all documents.

3. Click **Next**
1. Indicate if the **Subaward Amount** is greater than $25K.
2. Scroll down and complete the fields outlined in the **Subaward Details**.
Complete the Subaward Details for Line 1.

1. Overhead expenses $25K or less should be reflected in the Unit Price.
2. The description of the subaward should be entered in the Product Description field.
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. 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**.
1. Name your cart.  
2. Click Save.  
3. Check the Multi-Invoice/Payment box.  
4. If you are a Shopper in UD Exchange, Click Assign Cart to submit your Request to a Requester.

If you are a Requester in UD Exchange, you will have the option to click Proceed to Checkout to submit the Request, or click Assign Cart to submit it to another Requester for review.
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.

<table>
<thead>
<tr>
<th>Line Item Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Description</td>
</tr>
<tr>
<td>Subaward Request</td>
</tr>
<tr>
<td>1 Subaward overhead line entry</td>
</tr>
<tr>
<td>Procurement Request: Subaward Request</td>
</tr>
<tr>
<td>2 Subcontractor shall perform the work in accordance with the statement of work for the period 9/28/17-9/28/18 (year 1) for the project titled “Application of C and N Stable Isotope Analysis to Evaluate Biotic and Abiotic Degradation of DNAN and NTO.”</td>
</tr>
<tr>
<td>Procurement Request: Subaward Request</td>
</tr>
</tbody>
</table>

Shipping, handling, and tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget
Retrieving a Saved Form

1. If you saved a draft by clicking “Save Progress” and left the form, go to **Orders>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”