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**
Use the information on this page as a template for completing the subaward detail.

1. 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).

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.

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.
If you are not the PI:
1. **Click edit** to name the PI as the “Prepared For” user. This will be the PO Owner responsible for approving invoices.
2. **Click “Select a Different User”** 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>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”