

How and When to Obtain a Purchase Order for a Subrecipient Contract

June 2021

Sponsored Programs (SPA)

- 1) **NEW** - SPA will no longer wait for a PO# to be obtained to submit fully executed documents to a subrecipient. The agreement will be sent to the subrecipient “To Be Determined (TBD)” in the PO# field.
- 2) When SPA has a fully executed subrecipient agreement, it will be sent to the subrecipient, the requestor and the PI (NOT SSAS).
- 3) After administrators receive a fully executed agreement, a requisition for a purchase order can be submitted in Quantum. (Instructions follow)

Strategic Sourcing and Acquisition Services (SSAS)

How to Request a Purchase Order (PO) Number from Strategic Sourcing (SSAS)

NEW - **AFTER** an agreement has been signed by subrecipient and SPA

- 1) Submit a requisition in Quantum – completing the subrecipient requisition form:

EXAMPLE:

Time Period Start = 8/01/2020

Time Period End = 7/31/21

UMB PI= Jane Smith

Subrecipient PI = Joe Smith

Subaward Request # 1234

PO# = **LEAVE BLANK**

Federal ID# = xxxxxxxxxx

ADDRESS = 123 Main St. Anywhere, USA

Strategic Sourcing and Acquisition Services (SSAS)

How to Request a Purchase Order (PO) Number from Strategic Sourcing (SSAS)

Con't

- 2) Attach the fully executed agreement to the requisition. NOTE - a requisition without a signed agreement will be returned .
- 3) The DESCRIPTION LINE on the requisition must include the Subaward Request#

Example: Subaward Award # 1234 – Univ. of Colorado
- 4) NOTE to BUYER = Signed agreement/amendment attached
- 4) Strategic Sourcing will process the requisition into a PO
- 5) A completed purchase order notification will be sent to the requestor via Quantum
- 6) **NEW Department/requestor notifies the subrecipient vendor and SPA of the purchase order no.**

Strategic Sourcing and Acquisition Services (SSAS)

How to **Add Funds** to a purchase order (**Change order**)

AFTER an Amendment/Modification has been signed by SPA

- 1) Requestor submits a change order requisition in Quantum
- 2) Requestor attaches the signed amendment/modification to the requisition
NOTE - a requisition without a signed amendment/modification will be returned
- 3) Submit the requisition to SSAS
- 4) Strategic Sourcing (SSAS) will process the change order
- 5) A completed change order notification will be sent to the Requestor via Quantum

Strategic Sourcing and Acquisition Services (SSAS)

How to Extend the Period of Performance to a Purchase Order

(No additional funds)

AFTER an amendment/modification has been signed by SPA

- 1) Requestor sends an email to Strategic Sourcing subrecipient_po@umaryland.edu
- 2) Attach the fully executed (**signed**) amendment to the email
- 2) Strategic Sourcing will process the change order
- 3) A completed change order notification will be sent to the Requestor via Quantum

Strategic Sourcing and Acquisition Services (SSAS)

Sub Agreements That Already Have a Purchase Order Number

- 1) Email the fully executed agreement to subrecipient_po@umaryland.edu
- 2) Amendments/modifications (change orders to add funds) submit a requisition in Quantum
- 3) Change orders only extending period of performance - email a fully executed amendment/modification to subrecipient_po@umaryland.edu