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Purchasing Overview

Purchase Orders/Change Orders are generated from on-line requisitions. The Origin Field will indicate the type of Requisition being processed. Departments will be able to process an on-line requisition resulting in one of the following documents:

- College Requisition (CR)
- Internal Vendor Purchase Order (IV)
- Limited Value Purchase Order (LV)
- Subcontract Purchase Order (SC)

A (CR) College Requisition is processed when the purchase is:

1. In excess of $5,000;
2. Blanket Orders (External Suppliers and Internal Vendors);
3. Commodities and/or Services that are prohibited on a Limited Value Purchase Order (see section 2.16 of the URI Purchasing Manual);
4. Change Order (Advice of Change) to a PO issued as a result of a prior CR. Note: Change Orders cannot be processed to a LVPO or IV.

A (LV) Limited Value Requisition is processed when:

1. The purchase is $5,000 or less (inclusive of all costs; i.e. shipping and handling);
2. The commodity and/or service is an allowable purchase on a LVPO (see section 2.16 of the URI Purchasing Manual);
3. The purchase is a one-time delivery, one-time payment situation;
4. The purchase is within the current fiscal year only.

A (IV) Internal Vendor Requisition is processed when:

1. The purchase is from a URI Internal Vendor and is a one-time delivery, one-time payment situation (see section 2.12 of the URI Purchasing Manual).

A (SC) Subcontract Requisition is processed when:

1. URI intends to issue a new subcontract agreement to a subrecipient to perform part of the statement of work in a URI sponsored research project;
2. An amendment is required to modify an existing Subcontract Agreement. The following are some examples of when an amendment should be issued to modify an agreement:
   a. Changes to the Subrecipient’s budget (i.e. the addition/reduction of funds or re-budgeting that requires sponsor approval).
   b. Changes to the subcontract agreement’s period of performance.

Changes to the subcontract agreement’s terms & conditions, or the subrecipient PI or senior personnel named in the Notice of Award. NOTE: These changes are considered to be administrative and do not require a purchase order to be issued.

For additional information on Subcontract Purchase Orders please visit the Office of Sponsored Projects Review at: https://web.uri.edu/research-admin/submit-a-proposal/subcontract-requisition-po-internal-processes/.

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Requisition Workflow Terminology

1) **Approval Levels** with associated **Roles**:
   i) Pre-Approval - (Requester Role)
   ii) Level 1 – (Signatory from Signature Authorization)
   iii) Level 2 – (Final Review from Signature Authorization)
   iv) Level 3 – (Administrative Approvals i.e. Grant/Research and Foundation.)

2) **Approver** – User who Approves Requisition or Chartfield String (CFS).

3) **Category Code** – Used to categorize the item that is being purchased. Users should select the Category Code that most closely matches the item(s) they are purchasing. The Account Code is defaulted based on the Category selected.

4) **Denied Requisition** – Requisition that is sent back to Requester for correction or cancellation.

5) **Final Review** – 2nd Level Approver for the CFS – (Optional Approval Level).

6) **Hold from Further Processing Checkbox** – When checked: the Requisition is on hold; when unchecked: the Requisition is available for processing.

7) **Origin** – Type of Requisition indicates to the system and users how the Requisition is processed.
   The two-letter alpha code should be used for Requisitions. The Origins are listed below:
   i) CR – College Requisition - Routed to Purchasing for completion.
   ii) IV – Internal Vendor Requisition - Purchase Order auto generated directly from Req.
   iii) LV – Limited Value Requisition - Purchase Order auto generated directly from Req.
   iv) SC – Subcontract Requisition - Routed to the Research Office for completion.

8) **Originator** – A user who enters a Requisition but does not have Pre-Approval authority.

9) **Pre-Approval Process** – Requisition is entered by an Originator who must have a Requester Approve the Req. The Requester Pre-Approves the Req by clicking the Green Pre-Approve Check which changes the status from Open to Pending to facilitate workflow processing.

10) **Requester** – User who has been granted the authority to Pre-Approve Req. The Requester will be the primary contact for Requisitions and/or Purchase Orders.

11) **Routing** – The process of electronically moving work.

12) **Ship To Location** – Address where the item’s final delivery is shipped.

13) **Ship To Control** – Determines where the shipped item is first sent.

14) **Ship To Comments** - Field used to Add the Attn: (Person’s Name) to whom the item will be sent.

15) **Workflow** – Paperless On-Line work routing system.

16) **Worklist** – Approvers work queue, where users manage/review Requisition(s).
Components of a Requisition

This Manual explains how to enter each component of a Requisition, and how they relate to each other.

In PeopleSoft, Requisitions consist of five components:

1. **Requisition Header** – This includes the Requester name, Requisition date, Origin, Accounting Date and Header Comments.

2. **Requisition Defaults** – Where general information pertaining to the entire Requisition is entered. This includes data such as the Supplier, Category (*if all Line Items are of the same Category), Ship To Location and Due Date.

3. **Lines** – Where the Description, Quantity, Unit Of Measure (UOM), Category and Price for each Item you are ordering.

4. **Schedule** – Where the Ship To Address, Unit Price and Due Date are stored for each Item on the Requisition.

5. **Distribution** – Where accounting information (i.e. ChartField String) is entered. The ChartField String includes the Account, Fund, Department, Program, Project, Activity and Budget Date.
Documents Needed for Subcontract Requisitions

Various documents need to be provided with the different types of SC Requisitions:

A. New Subcontract Agreement Requisitions (the following documents should be obtained from the Cayuse proposal or the Principal Investigator - PI):
   1. Subrecipient Monitoring Form;
   2. Subrecipient Budget;
   3. Subrecipient Budget Justification; and

B. Requisitions to revise the budget of an existing Subcontract Agreement:
   1. Revised Subrecipient Budget that shows the approved changes; and
   2. Revised Statement of Work (if the Subrecipient’s work will be changing as a result of the changes to the budget).

C. Requisitions to revise an existing Subcontract Agreement’s period of performance only:
   1. Revised Statement of Work (if the Subrecipient’s work will be changing as a result of the change to the end date).

D. Requisitions for any administrative changes to an existing Subcontract Agreement (i.e. changes to the Subrecipient PI or Senior Personnel named in the Notice of Award; changes to the Agreement’s terms & conditions).
   1. Revised Statement of Work (if the Subrecipient’s work will be changing as a result of the change).

**The above information is current as of July 2019 and may be subject to change from the Office of Sponsored Projects. See [https://web.uri.edu/research-admin/office-of-research-integrity/human-subjects-protections/human-subject-guidance/does-my-research-qualify-as-exempt-research/](https://web.uri.edu/research-admin/office-of-research-integrity/human-subjects-protections/human-subject-guidance/does-my-research-qualify-as-exempt-research/) for contact information.**
Logging Into Peoplesoft

PeopleSoft is to be used in accordance with the URI Access and Compliance Data Confidentiality Statement.

The Data Confidentiality Statement can be found here:

http://web.uri.edu/ecampus/hr/data-security/

Log into PeopleSoft using your e-Campus UserID and Password here:

https://appfsprod.uri.edu:9301/psp/fsprod/EMPLOYEE/ERP/?cmd=login&languageCd=ENG&
To Add a New Requisition

From the Main Menu, choose Purchasing:

Then choose Requisitions:

Then choose Add/Update Requisitions:

To add a new Requisition, Click Add

STOP

➢ The Requisition ID (Requisition number) will auto generate the next number once the Requisition has been saved.

➢ All text should be entered in upper/lower case.

➢ **Subcontract Requisitions (SC) require that a Supplier is selected.** If the Supplier is not in PeopleSoft, they will need to register with the University through the Controller's Office. Suppliers should be directed to the registration instructions on the Controller's website which can be found at: [http://web.uri.edu/controller/vendor-registration/](http://web.uri.edu/controller/vendor-registration/).

➢ Once the Supplier is added to PS, you may proceed with entering the SC Requisition.

➢ When selecting the Supplier address, open Supplier Information in PS and pick the address that matches what is on the Sub-Recipient Monitoring Form. (Navigation: MainMenu> Suppliers> SupplierInformation> Add/Update> Supplier)

➢ A Supplier like a University may have multiple “remit to” addresses.

➢ If another address needs to be added, please contact the Controller’s Office/Accounting at extension 4-7553.
Requisition Header

- Requester - defaults based on your logon;
- Requisition Date - defaults to the current date;
- Origin defaults to KNG - Change to: SC = Requisition;

Click the and Select SC;

Then Click on the Requisition Defaults Hyperlink:

It is IMPORTANT that you access the Requisition Defaults page and enter the following fields prior to entering any information on the lines which will be discussed later.

PLEASE NOTE: ANY INFORMATION ENTERED IN THIS SCREEN WILL POPULATE TO ALL LINES.
Requisition Defaults

Buyer – Leave Blank;
Unit of Measure – Leave Blank;

Supplier – Select the Supplier by clicking on the Supplier Lookup hyperlink.

NOTE: Subcontract Requisitions (SC) require that a Supplier is selected. If the Supplier is not in PS, they will need to register with the University through the Controller’s Office. Suppliers should be directed to the registration instructions on the Controller’s website which can be found at: http://web.uri.edu/controller/vendor-registration/
Supplier Lookup/Search

Type the Supplier name or a portion of the Supplier name. If the Supplier is an individual, type the last name first. Click Search

Select the Supplier from the Search Results by typing a check (√) on the box at the beginning of the line. If there are multiple locations, select the “MAIN” Location.

Note: If there are multiple locations beginning with MAIN, preview the address for each and select the appropriate “MAIN” location.

Click OK

Once selected, the Supplier Number and Location will populate onto the screen.

If the Supplier is not in PeopleSoft, they will need to register with the University through the Controller’s Office. Suppliers should be directed to the registration instructions on the Controller’s website which can be found at: http://web.uri.edu/controller/vendor-registration/.
The Ship To Location is where the goods/services will be delivered. Select the Ship To Location in one of these ways:

- If you know the four-digit Department Number where the goods/services are being delivered you may enter that number in the Ship To field, click and select from the Search Results;

- OR

- Search by the Department Name by clicking the next to the Ship To field, type the Department Name in the Description field, click and select from the Search Results.

In those rare instances where goods/services are not being delivered to the University, type “offsite” in the Ship To field and click . Select OFFSITE. The following message will appear:

The complete Ship To address will need to be entered as a Comment in the Requisition Header Comments section and is described on Page 34.
The requested Due Date for the delivery of goods/services.

When processing a Subcontract Requisition, DO NOT ENTER the Due Date here. The Due Date will be entered on the line; see Page 22 for entering the Due Date on the Line Item.

“Distribute By” defaults to “Amount” – DO NOT CHANGE
Distributions

When processing a Subcontract Requisition, DO NOT enter the Distribution(s) here.

The Distribution(s) will be entered on the Line; see Page 23.

Click OK to return to the main Requisition screen.

Return to the Main Requisition Screen
On the main Requisition page:
Description – The Description for Subcontract Requisitions is as follows:

If the Subcontract is subject to Facilities & Administrative Costs (F&A) there will be two lines:
Line 1 – Subcontract <$25K (subject to F&A); and
Line 2 – Subcontract >$25K (not subject to F&A)

*If the Subcontract is not subject to F&A: all costs should be entered into Line 1 as “Subcontract >$25K (not subject to F&A)”:
Line 1 - Subcontract>$25K (not subject to F&A)

*If the Subcontract is receiving another installment and the $25K limit has already been reached: all costs should be entered into Line 2 as “Subcontract >$25K (not subject to F&A)” – see Page 56 for more information on how to process an Advice of Change to a SC Purchase Order.

Refer to the Sample SC Requisitions starting on Page 57 to see examples of different Reqs from various Departments.
There are 4 ways to enter the Line Item Description:

1 – Click on the ▼ at the end of the Description to access the entire Description area:

2 - Expand the ▪ box at the end of the Description by Clicking and Dragging it and type in your Description:

3 – Click the icon to the left of the Description. This will take you to the Details for Line screen:

4 - If additional information needs to be added, it can be added as a Line Comment *(See below)*:
The Quantity for a Subcontract Requisition is typically 1:

The Unit of Measure (UOM) for a Subcontract Req is TOT = Total:

REMINDER: Only one Category Code can be used per Line Item

Enter the appropriate Category; i.e.:
447A = Subcontracts <$25K; or
446A = Subcontracts >$25K.

Enter the Total Price for Line 1. You only need to use a decimal when the Unit Price is in dollars and cents.
If you need to add a Line Comment, go to Page 32.

Ship To

Defaults from the Requisition Defaults page:

Ship To Control

The default Ship To Control is “K” for Kingston Central Receiving:

When the default Ship To Control is accepted, the Ship To address that will print on the Purchase Order will include URI, Central Receiving, Kingston, RI. 02881.

- To Change the default Ship to Control, click 🔍.
- See the next page for instructions on how to change the Ship To Address.
➢ Change the Ship To Address

Select “D” for Direct Delivery to the Department (Non-Central Receiving)
The address will read: University of Rhode Island, Department name and physical address. For example:

```
Ship To: University of Rhode Island
        Facilities Services, Business Office
        60 Toottell Rd., Sherman Bldg. 2nd Floor
        Kingston RI 02881
```

Select “G” for GSO Central Receiving:
The address will read: URI GSO Central Receiving, Narragansett, RI 02882-1197, followed by the Department name and address. For example:

```
Ship To: URI GSO Central Receiving
        Narragansett, RI 02882-1197
        Ocean Engineering
        215 So. Ferry Rd., 110 Sheets Bldg.
```

Select “K” for URI Central Receiving:
The address will read: URI Central Receiving, Kingston, RI 02881, followed by the Department name and address. For example:

```
Ship To: URI Central Receiving
        Kingston, RI 02881
        CMB CBLS
        120 Flagg Rd., Room 098
```

Notes: *
* If delivery is to be made to the Alton Jones Campus or FCCE, select “D” for Direct Delivery.
* This action only needs to be performed on Line 1/Schedule 1.

If you have selected a Ship To of “OFFSITE”, change the Ship To Control to “D”.
* You will type the complete Ship To address in a Header Comment.
* If you have chosen an OFFSITE Ship To location do not access the
* “SEE BELOW” will print in the Ship To area on the printed PO:

```
Ship To: SEE BELOW
```
➢ Change the Ship To Comments

If you would like the shipment to be addressed to a particular individual, Click the hyperlink.  **Note:** This action is performed once on Line 1/Schedule 1 only.

** If you have chosen an OFFSITE Ship To Location, do not access the Add/Edit Comments.

➢ **Note:** The Ship To chosen on the Requisition Defaults page will be the only default choice.  
➢ In the Comment Box type the name only of the individual/room/lab that the shipment should be addressed to.  
➢ When done, Click **OK**.
When the PO is printed, the Ship To address will look like this:

\[\begin{array}{|c|c|c|c|}
\hline
\text{Ship To:} & \text{URI Central Receiving} \\
& \text{Kingston, RI 02881} \\
& \text{CMB CBLS} \\
& \text{120 Flagg Rd., Room 098} \\
\hline
\text{Attention:} & \text{Bruce Corliss} \\
\hline
\end{array}\]

PeopleSoft automatically adds the word “Attention”.

You will then be returned to the Maintain Requisitions – Schedule page:
The Due Date for a Subcontract Requisition is the End Date of the Subcontract.

Type the Due Date or select a Date by clicking the

Click on the Distribution icon.

You will receive this message:

Warning – date out of range. (15,9)

The date entered is either more than 30 days in the past or 30 days in the future. This is not normally true for this date. Either acknowledge that the date is OK, or correct the entered date.

Click

You will now enter the Distributions for the Line:
Entering Distributions on the Line

When Distributing by more than one ChartField String, Click \( \text{+} \) to add the desired number of rows:

Enter the desired number of rows. For example, if the purchase is being charged to 2 ChartField Strings, click \( \text{OK} \) to add 1 row.

Initially, the Category Code that was chosen on the Line Items page (see Page 17) will populate the Account Code to the first Distribution line. When more lines are added, the same Category Code will populate in the Account field. **DO NOT CHANGE THE ACCOUNT #**

REMINDER: Only one Category Code can be used per Line Item
Enter the Percent or Amount for each Distribution Line along with Fund, Dept, and Program. Select the PC Bus Unit (URIPS) by clicking . Enter the Project and Activity by typing them in or clicking next to each space.

The Budget Date defaults to the current date. Change the Budget Date to be the End Date of the Subcontract.

**NOTE:** The End Date of the Subcontract CANNOT be past the End Date of URI’s Prime Award. Subawards follow the Project’s Period of Performance and not the Fiscal Year.

When done entering Distribution information for this line, Click to return to the Schedule page.
Then Click [Return to Main Page]:

This will return you to the Main Requisition page:

Adding Line 2:

If the Subcontract is being charged to two Accounts (5447 and 5446) you will need to add another Line.

To add another Line, click [If this SC Req only requires one line, go to Page 29 to Save the SC Req]
Enter the desired number of rows (lines) to add.

For example: if the Requisition is for a total of 2 lines, enter 1.

Click OK.

Two blank lines will be added to the PO.

Refer to the Sample SC Requisitions starting on Page 57 to see examples of different Reqs from various departments.

Type the Description, Quantity, UOM, Category* and Price for the new Line

*Reminder to enter the appropriate Category for each line:
447A = Subcontracts <$25K and
446A = Subcontracts >$25K

When done, Click the Schedule icon at the end of the new Line

For more information on selecting the correct Budget Date, see page 24.
Again, enter the Due Date, which is the End Date of the Subcontract:

Click on the Distribution icon.

You will receive this message:

Warning – date out of range: (15,0)

The date entered is either more than 30 days in the past or 30 days in the future. This is not normally true for this date. Either acknowledge that the date is OK, or correct the entered date.

Click OK.
You will now enter the Distributions for this Line:

If distributing by more than one CFS, Click to add more rows

The Account Number will populate from the Category Code entered on the previous page.

The Budget Date defaults to the current date; change it to the End Date of the Subcontract (see Page 24).

Enter the Percent or Amount for each Distribution Line along with Fund, Dept, Program, PC Bus Unit (URIPS), Project and Activity.

When done, Click to return to the Schedule page.
On the Schedule page, Click [Return to Main Page]:

This will return you to the Main Requisition page:

Click [Save] to save the SC Requisition.
You will receive this message:

This Requisition will be held from further processing (20001,42)
The Hold From Further Processing check box is currently on for this requisition. If your intention is to hold this requisition simply hit the OK button in this message box. If you would like to release this requisition, turn off the Hold From Further Processing check box and hit the save button.

Click [OK]

Requisition ID

A Requisition ID has been assigned. The Requisition ID is for internal use only. (This is not the Purchase Order Number)
**PLEASE NOTE THESE TIPS:**

- **Comments** – Comments can either be a typed [Header Comment (see Page 34)] or a typed [Line Comment (see Page 32)].

  - Be sure to include the Subcontract (Sub Award) Period of Performance in the Header Comments and any other information that you would like included in the Subcontract Agreement. For example:
    - Special Reporting Requirements: Progress Reports should be submitted quarterly, annually, or within a certain amount of time after the Subcontract End Date.
    - Carryforward Authorization: Carryforward is restricted on all Subcontract Agreements, unless the URI Principal Investigator requests otherwise. Note: Automatic Carryforward is only permitted when it is authorized by the URI’s Prime Award.

  - Comments or information pertaining to the Subcontract may be used for comments for the Supplier or as internal comments.

  - For the comments to print on the Purchase Order, you must Select [Send to Supplier]. If the comments are for internal use only, do not check the box.

  - Note: All requisition “comments” will print on the requisition but will not print on the Purchase Order unless you have checked [Send to Supplier].

  - The Send to Supplier option applies to Comments in the Comment Text Box only, not to the documents attached. For the Attachment to be sent to the Supplier, you must Check the box next to the Attachment - [Email].

**All documentation relating to the Subcontract must** be attached to the electronic Requisition. This includes but is not limited to the Statement of Work, Sub-Recipient Monitoring Form and Budget from the Proposal. ([See Page 36 to Attach a Document] ~ [See Page 6 for a list of possible documentation])

  - Attachments, for the most part, must first be scanned and saved to a location where you will retrieve them and attach to the Requisition. The naming convention for Attachments is as follows: Requisition Origin (SC), Requisition ID_ followed by the type of Attachment; the Statement of Work, for example, would be SC19887_StatementOfWork.
  - Any attachment that is to be sent to the Supplier along with the resulting Purchase Order will need to be scanned and attached separately and not combined with any internal documentation.
  - In order for the Attachment to be sent to the Supplier with the Requisition, remember to check the Email box - [Email].
A note about the Category and the Line:

There are two Categories for Subcontracts:
447A = Subcontracts <$25K; and
446A = Subcontracts >$25K.

The category will populate the Account:
447A = account 5447; and
446A = account 5446.

Typically, Subcontracts are charged to both Categories/Accounts; therefore, the Category will be selected on the Line(s); see Page 17 for entering the Category on the Line Item.

Adding Line Comments

The Line Comment is a space to further explain and/or give details that only apply to that Line. To add a Line Comment, choose the line you would like the Comment to be associated with by Clicking on the talk bubble icon on that line.

DO NOT ATTACH ANY ATTACHMENTS TO A LINE COMMENT. To add an attachment, follow the instructions on Page 36.
Once in the Line Comments section, you can **type** your detailed information about that line here:

Check the **Send to Supplier** box as well.

Click **OK** when done.

Most often departments use line comments when they are moving funds between funds between 5446 and 5447; or amending an agreement.

You will then be returned to the main Requisitions screen and can continue to enter the Line information. **Note:** the talk bubble now has lines in it to show that there is a comment typed there:
Adding Header Comments

To add a Header Comment, Click on the hyperlink Add Comments:
If an “OFFSITE” Ship To Location was chosen, enter the entire Ship To Address in the Header Comment field as follows:

Example: Please issue a new subcontract in the amount of $50,000 for 9/1/19-8/31/20. In accordance with the Notice of Award, Automatic Carryforward is permitted. Progress reports should be submitted to the Principal Investigator 45 days after the Subcontract End Date. The Subrecipient Monitoring Form, Budget, Budget Justification, and Statement of Work are attached.
Adding Attachments

To add an Attachment(s), Click Attach in the Header Comments box:

This message will appear:

Click Browse...
Using the navigation on your computer, find the file that you want to attach to the Requisition:

![Image of file upload window]

The name of the file will pop up in a window:

![Image of file attachment window]

Click **Upload** to attach the file

The Attachment will be listed on the Comment. If you would like the Attachment to be included with the resulting Purchase Order, check the **Email** box.

(If the Attachment is for internal use only do not check the **Email** box. - For example, if the Attachment includes a Subrecipient Monitoring Form, the e-mail check box will not be checked.)

REMEMBER: All Subcontract Requisitions must include the appropriate attachments, including: Statement of Work, SubRecipient Monitoring Form, Budget from Proposal, Budget Justification and Statement of Work. Please make sure all are attached before saving the SC Requisition.
To view the Attachment, Click on the View button. The Attachment will pop up in a new window. After checking for accuracy, close the new window to return to the Requisition.

To View All Comments click on the View All hyperlink. Once you are in the “View All” Mode, you can either scroll down to the last Comment to add another Comment or insert Comments in between other Comments.
Continue adding more Attachments by clicking +. *Please note:* PeopleSoft allows you to attach only 1 attachment per Comment box – if you have 2 more attachments, you will need to add 2 more Comment boxes.

Click OK when done.
This will bring you back to the main Requisition screen:

Click on ![Save](Save_icon.png) to save all of your changes to the Requisition.

This message will appear:

Click ![OK](OK_icon.png)

You are now ready to Print your Requisition.
Print the Requisition

To View and/or print a copy of the Requisition, click the View Printable Version hyperlink on the main Requisition screen:

This message may appear:

Click Yes

The following message will appear:

Click OK

A new window will open in PeopleSoft and will display the Printable Version of the Requisition. Check it for accuracy.
A second tab will open as the Printable Version queues and then prints to the screen. Proofread this copy to make sure all information is correct. If any changes need to be made, close this tab and go back to the Add/Update Requisitions tab to make and save changes to the Requisition and then Click [View Printable Version] again.

Tab 1 = Add/Update Reqs
Tab 2 = Printable Version of Req

Refer to the Sample SC Requisitions starting on Page 57 to see examples of different Reqs from various departments.
To print the Requisition, choose either File in the upper left of the screen or the printer icon in the upper right of the screen.

The Print box window comes up; choose where to Print your Requisition and Click.

Once you have previewed and printed the Requisition, close the second window by clicking 

On the following pages, you will find instructions on how to proceed for both:

- Originator (Page 44); or
- Requester (Page 45)
Note: The Requisition will remain in open status until the Requester submits the Requisition for approval.

The Requester will receive an e-mail informing them that a Requisition is pending and needs to be submitted for approval:

This e-mail is to notify you that Subcontract Requisition: 0000019932, entered by bettyg is in open status and needs to be submitted for approval.

If you are a “Requester” and you have received an e-mail regarding submitting a Requisition for approval, log on to PeopleSoft and retrieve the Requisition via the following navigation: (Purchasing>Add/Update Requisitions>Find an Existing Value).

Enter the Requisition ID and click Search.
Once you have reviewed the Requisition, follow the above steps to change the status from open to pending.

The Requisition has now entered the Workflow Approval Process.

Once this happens the Requisition cannot be retrieved.
 REQUESTER Procedures:

When the Requisition is Complete, if you are a “Requester” and you have entered the Requisition, uncheck the Hold From Further Processing Box:

Then Click on the icon to Submit for Approval (the status changes from Open to Pending):

Then Click Save at the bottom of the screen.

The Requisition has now entered the Workflow Approval Process.

Once this happens the Requisition cannot be retrieved.
Workflow Approval Process

Level 1 - Signatory for Signature Authorization
Level 2 - Final Review from Signature Authorization
Level 3 - Administrative Approvals; i.e.:
  - Foundation Office when using Foundation Funds
  - Sponsored and Cost Accounting when using Research Funds
  - Business Services when using Bond Funds
Level 4 - Administrative Approvals which are based on the Category/Account Code
  - Controller’s Office for Prepaid Costs, Revolving Loan Costs and Service Charges
  - Capital Projects for Construction-related expenses
  - Public Safety for Radioactive Materials and Safety Supplies
  - Property Department for Capital Equipment on fund 500

The Approver(s) (Level 1) will receive this e-mail:

This e-mail is to notify you that Subcontract Requisition: 0000019915, Requester: ewhite, is seeking level 1 approval for Chartfield String: URIPS10040550000, and has been added to your e-Campus Financials Worklist.

The Approver(s) can either Approve or Deny the Requisition.

Note: All Approval Levels have the authority to Approve or Deny a Requisition.

If the Requisition is Denied, the Requester will receive an e-mail informing them that the Requisition has been Denied. If the Approver indicated a reason it will appear as a Comment:

This e-mail is to notify you that Subcontract Requisition: 0000019915 entered on 04/05/2010 has been denied by OPRID: bettyg

Comments: We do not have the money at this time.

Once a Requisition has been Denied, the Requester can retrieve the Requisition (use this Navigation:Purchasing>Add/Update Requisitions>Find an Existing Value).

Enter the Requisition ID and click Search.

Make necessary changes, pre-Approve and Click Save.

Upon saving the Requisition, the Workflow Approval Process, will begin again.

If a Requisition needs to be Canceled please see “Canceling a SC Requisition” on Page 54.
If the Approver(s) (Level 1) Approve the Requisition and any other Approvals that may be required; i.e. (Level 2) Final Review, (Level 3) Foundation Office (if Foundation Funds are being used, Sponsored and Cost Accounting if Research Funds are being used, etc.), (Level 4) based on Category/Account, the Requester will receive an e-mail indicating that the Requisition has been Approved:

This e-mail is to notify you that Subcontract Requisition: 0000019911 entered on 02/06/2012 has been approved.

Once the Subcontract Requisition has been approved by all levels, the Budget Checking Process will automatically be initiated. The Subcontract Requisition will be routed to the Office of Sponsored Projects when the Budget Checking Process is complete and the Requisition is in valid Budget Status.

If the Requisition fails Budget Checking, the Requester will receive an e-mail:

This e-mail is to notify you that Subcontract Requisition: 000000094 has budget errors.

Because the Requisition did not pass Budget Check, the Requester is able to access the Requisition and determine the cause of the Budget Error and either process a Budget Transfer and/or make the necessary changes:

Retrieve the Requisition (Nav: Purchasing>Requisitions>Add/Update Requisitions):

Click on the tab
Enter the Requisition Number in the Requisition ID field

Click Search

Purchasing Subcontract Requisition (SC) Rev 8/2019
When you retrieve the Requisition you will notice that the **Budget Status: ** is **Error** and the Requisition has automatically been placed back on hold. Click on the **Error** hyperlink to determine the cause of the budget error:
In this particular example, the Budget Error Exception is the result of “Budget Date out of Bounds”.

This Budget Error Exception typically occurs when using a Fund 500. If you receive a Budget Error of this type, you will need to contact the appropriate accountant in the Sponsored and Costs Accounting Office.

Other examples of Budget Errors and instructions on how to fix them can be found on the following page:
If a Budget Transfer is necessary to support the purchase, you will first need to make the Budget Transfer.

Once the Transfer has been made:
- Uncheck the box; and
- Click
- In this example, the Requisition will not require Re-Approval and will invoke the Budget Process again.

If there are changes to the distributions, i.e.: change the Chartfield String or change the Price, the Workflow Approval Process will start again once the Requisition is taken off Hold, Submitted For Approval and Saved.

When all is correct:

Once a Subcontract Requisition has been routed to the Office of Sponsored Projects and a Purchase Order is issued, a copy will be emailed to:
- Supplier – This is the Supplier’s authorization to proceed;
- Requisitioning Department – This is the Department Receiving Report Copy

If there are any attachments, they will be a separate .PDF file. For example, the PO is one .PDF and the Attachment(s) are a separate .PDF.
Sample Purchase Order:

The Purchase Order number is located in the top right-hand corner.

Once the Subcontract is complete, the Department copy of the Purchase Order is to be signed by the individual who has signature authorization for “Receiving Reports” and forward to the URI Accounts Payable Office.

Note: Payment cannot be made until the URI Accounts Payable Office receives the invoice from the Supplier and the signed receiving report copy of the PO.

Refer to the Sample SC Purchase Orders starting on Page 66 to see examples of different POs from various departments.
A Subcontract Requisition submitted to the Office of Sponsored Projects requiring additional information, documentation, etc. may be returned. When a requisition is returned from the Office of Sponsored Projects, the requester will receive an e-mail stating the reason for return.

> Returned Subcontract Requisition

This e-mail is to notify you that Subcontract Requisition: 0000000094, has been returned by the URI Research Office for the following reason(s): Attach something please.

Please note: Once a requisition is returned you MUST perform one of the following:

- Return the requisition to URI Research Office: After completing the above uncheck the "Hold From Further Processing" and "SAVE" the requisition.

- Cancel the requisition to liquidate the pre-encumbrance.

If you have any questions, please contact me.

Returned Requisitions will not require Re-Approval through the Workflow Approval Process unless there is a change to the ChartField String or Price. For example, if a Requisition is returned for detailed specifications, the Requester will retrieve the Requisition (see instructions above to retrieve the Requisition), attach the missing document(s), and click **Resubmit**.

Once the Resubmit button has been clicked, the Requisition will automatically route back to the Office of Sponsored Projects.
If there is a change to Quantity, Price or ChartField String, a Change Order to the Requisition will be created and the Requisition will require Re-Approval. Once a change is made to one of the above Fields, you will receive the following message:

```
Message

This action will create a change order. Continue? (10200.27)

The action that you are taking will cause the system to create a change order. If you do not want to create a change order, then you cannot perform the action at this time.
```

1. Click Yes

2. Click

3. Uncheck Hold From Further Processing

4. Click on Status: Open

5. The Status will change from Open to Pending

6. Click Save

The Requisition has now entered the Workflow Approval Process. Once this happens the Requisition cannot be retrieved.
Canceling a SubContract Requisition

Requesters can cancel a Subcontract Requisition when the following conditions exist:

- **Status: Open/Budget Status: Not Checked** and the Hold From Further Processing is Checked. For example, if you prepare a Requisition and decide you no longer need the goods/services, it is your responsibility to cancel the Requisition.
- **Status: Denied/Budget Status: Not Checked**
- **Status: Returned Requisitions - Approved/Budget Status: Valid**

Example of Denied Requisition:
This message will appear:

**Message**

Canceling a requisition will commit any changes made and prevent further changes. Continue? (15196, 7)

When you mark a requisition as complete or canceled, the system does not allow any further changes to the requisition. Any changes made, however, will be stored on the requisition.

If you have any more changes to make to this requisition, do not mark it as complete or canceled at this time. Make the other changes, then return to change its status.

Click **Yes**
Advice of Change to a Subcontract Requisition

All Advice of Change Orders require a detailed breakdown of the reason(s) for the change.

The Description on all Advice of Change (AOC) SC Reqs should read:

Advice of Change to PO # (reference original PO #) and then indicate what the change is with a detailed explanation – is it an increase? decrease? Period of Performance date extension? Or a combination of reasons.

The following are typical scenarios of an Advice of Change to a SC PO:

- Funds are being increased – see Sample #6 on Page 63.
- Funds are being decreased – see Sample #7 on Page 64.
- The Period of Performance date needs to be extended – see Sample #8 on Page 65.
- Carry Forward funds need to move to the next year – see Sample #8 on Page 65.
- If the Subcontract is receiving another installment and the $25K limit has already been reached on Line 1: all costs should be entered into Line 2 as “Subcontract >$25K (not subject to F&A)”.

Some Notes to keep in mind when processing an Advice of Change Req:

- When “increasing” a Purchase Order, enter the actual dollar amount of the increase on the line.
- When “decreasing” a Purchase Order, enter an amount of $1.00 (DO NOT ENTER A NEGATIVE AMOUNT; DO NOT ENTER 0).
- When “changing” a Date, only enter an amount of $1.00 on the line.
- All documentation relating to the purchase MUST be attached to the electronic Requisition. This includes but is not limited to: Subrecipient Monitoring Form, updated Budget and Budget Justification, Statements of Work, etc.

For a more detailed explanation of entering an Advice of Change Requisition, please refer to the Manual “College Requisition (CR) Advice of Change” Manual found on the URI Purchasing website under Department Resources > On-Line Requisitioning Information, or follow this link: https://web.uri.edu/purchasing/on-line-requisitioning/ and click on the Manual name.
Sample SubContract Requisitions and Purchase Orders
Sample #1:

**Subcontract Requisition**

This Form is for Internal Use Only

### Suggested Vendor Name:
University of California

### Vendor Address:
The Regents of the Univ of Cal, San Francisco
San Francisco, CA 94143-1241

### Vendor: 0600000784

### Ship To:
University of Rhode Island
CMB CBLLS
120 Flagg Rd., Room 098
Kingston, RI 02881

### Business Unit | URIPS | APPROVED
--- | --- | ---
Date | Page | Req ID |
1/12/2018 | 1 | 0690146005

### Requester:
E-mail for Receiving Report

### Requestor Dept.:
Phone # | Fax # |
N/A | 401/277-5253 | 401/277-5354 |

#### Attachments:
Y

<table>
<thead>
<tr>
<th>Line-Schd</th>
<th>Description</th>
<th>Quantity</th>
<th>UOM</th>
<th>Price</th>
<th>Extended Amt</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-1 Subcontract &lt; $25K for I. Rodriguez-Barrero of the University of California San Francisco to work on Core B of Flavivirus Infections grant. Dates 01/13/2016-07/31/2018.</td>
<td>1.0000 TOT</td>
<td>25,990.0090</td>
<td>25,000.00</td>
<td>07/31/2018</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2-1 Subcontract &gt; $25K for I. Rodriguez-Barrero of the University of California San Francisco to work on Core B of Flavivirus Infections grant. Dates 01/13/2016-07/31/2018.</td>
<td>1.0050 TOT</td>
<td>105,933.0086</td>
<td>105,933.00</td>
<td>07/31/2018</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### IN THIS NEW REQUISITION EXAMPLE:

- Line 1 is <$25K with description of project;
- Line 2 is >$25K with description of project;

#### Header comments each describe an attachment.

<table>
<thead>
<tr>
<th>Period</th>
<th>Line-Schd-Date</th>
<th>Accounts</th>
<th>Project</th>
<th>Activity</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY2020</td>
<td>1-1-1</td>
<td>5497-500-2014-0000</td>
<td>0007489</td>
<td>RESEARCH</td>
<td>25,000.00</td>
</tr>
<tr>
<td>FY2020</td>
<td>2-1-1</td>
<td>5498-500-2014-0000</td>
<td>0007489</td>
<td>RESEARCH</td>
<td>105,933.00</td>
</tr>
</tbody>
</table>

For purchasing use only

<table>
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<tr>
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<th>Type/Code</th>
<th>SRF</th>
<th>Clerk</th>
<th>Date</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Buyer</th>
<th>Date</th>
<th>Type/Code</th>
<th>PO#</th>
<th>Rev#</th>
<th>Clerk</th>
<th>Date</th>
</tr>
</thead>
</table>
Sample #2:

**Subcontract Requisition**  
This Form is for Internal Use Only

<table>
<thead>
<tr>
<th>Line-Sched</th>
<th>Description</th>
<th>Quantity</th>
<th>UOM</th>
<th>Price</th>
<th>Extended Amt</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-1</td>
<td>Subcontract to Brown University &lt;$25K (Subject to F&amp;A)</td>
<td>1.0000 TOT</td>
<td></td>
<td>25,000.00</td>
<td>25,000.00</td>
<td>12/30/2019</td>
</tr>
<tr>
<td>2-1</td>
<td>Subcontract to Brown University &gt;$25K (not subject to F&amp;A)</td>
<td>1.0000 TOT</td>
<td></td>
<td>19,700.00</td>
<td>19,700.00</td>
<td>12/30/2019</td>
</tr>
</tbody>
</table>

**IN THIS NEW REQUISITION EXAMPLE:**
- Line 1 is <$25K (Subject to F&A);
- Line 2 is >$25K (Not subject to F&A);

Header comments each describe an attachment.
**Sample #3:**

### Subcontract Requisition

This Form is for Internal Use Only

<table>
<thead>
<tr>
<th>Suggested Vendor Name:</th>
<th>Board of Regents of the University of Oklahoma</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vendor Address:</td>
<td>Norman, OK 73019</td>
</tr>
<tr>
<td>Vendor#:</td>
<td>0000066849</td>
</tr>
<tr>
<td>Ship To:</td>
<td>University of Rhode Island</td>
</tr>
<tr>
<td></td>
<td>Electrical, Computer &amp; Biomedical Engineering</td>
</tr>
<tr>
<td></td>
<td>51 Lower College Rd., RM 125, Pastore Hall</td>
</tr>
<tr>
<td>Attention:</td>
<td>Kingston, RI 02881</td>
</tr>
</tbody>
</table>

### Line-Sched | Description | Quantity | UOM | Price | Extended | Due Date | Remarks |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1-1</td>
<td>Subcontract Agreement between University of Rhode Island and University of Oklahoma &gt;$25K (Not subject to F&amp;A) Time Frame: 8/1/18-7/31/20</td>
<td>1.0000 TOT</td>
<td></td>
<td>400,356.52</td>
<td>400,356.52</td>
<td>07/31/2020</td>
<td>Replaces PO#9521 which was closed because the supplier number changed. This represents a no cost extension of the original award through 7/31/20.</td>
</tr>
</tbody>
</table>

**Total Requisition Amount:** 400,356.52

### For purchasing use only

<table>
<thead>
<tr>
<th>Buyer</th>
<th>Date</th>
<th>Type/Code</th>
<th>S#</th>
<th>Clerk</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Notes:

**IN THIS NEW REQUISITION EXAMPLE:**

- Line 1 is >$25K (Not subject to F&A) with description of project and time frame of project;
- Header comment describes the circumstances of this SC Req.
IN THIS NEW REQUISITION EXAMPLE:
Line 1 is <$25K (Subject to F&A) ONLY
Header comment describes the subcontract and time period as well as attachments.
**Sample #5:**

**Subcontract Requisition**

This Form is for Internal Use Only

---

**Suggested Vendor Name:** Rhode Island College  
**Vendor Address:** 600 Mt Pleasant Ave  
**Providence, RI 02908**  
**Vendor#:** 00000005532  

**Ship To:** University of Rhode Island  
Biomedical & Pharm Services  
7 Greenhouse Rd  
Kingston, RI 02881  

**Attention:** Laura Bellavia

---

**Line No.** | **Description** | **Quantity** | **UCM** | **Price** | **Extended Amount** | **Due Date**
---|---|---|---|---|---|---
1.1 | Subcontracts <$25k | 1.0000 | TOT | 18,372.0000 | 18,372.00 | 04/30/2020

---

IN THIS NEW REQUISITION EXAMPLE:  
Line 1 is <$25K (Subject to F&A) ONLY  

Line comments are used for subaward description and time period.  
Header comments continue with more information.

---

**Funding Information:**  
---

**For purchasing use only**

<table>
<thead>
<tr>
<th>Buyer</th>
<th>Date</th>
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<th>SR#</th>
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<tbody>
<tr>
<td>Buyer</td>
<td>Date</td>
<td>Type/Code</td>
<td>PO#</td>
<td>Rev.#</td>
<td>Clerk</td>
</tr>
</tbody>
</table>
IN THIS AOC REQUISITION EXAMPLE – Funds are being added to the PO:

Line 1 describes the change

Header comments describe the attachments as well as showing the increase to the PO.
Sample #7:

**Subcontract Requisition**

This Form is for Internal Use Only

**Suggested Vendor Name:** Brown University  
**Vendor Address:** The Education Alliance  
Providence, RI 02903-4226  
**Vendor #:** 0000000973

**Ship To:** University of Rhode Island  
GSO Research  
NBC, 200 Jefferson Rd,  
Narragansett, RI 02882-1197

**Attention:** Glider-Based Observations of Hydrography and Nutrients in Rhode Island Sound in Support of RI C-AIM Modeling  
**Attachment:** N

<table>
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<tr>
<th>Line-Schd</th>
<th>Description</th>
<th>Quantity</th>
<th>UOM</th>
<th>Price</th>
<th>Extended Amt</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-1</td>
<td>Advice of change to PO # 136648 to decrease in the amount of $22.73</td>
<td>1.0000</td>
<td>TOT</td>
<td>1.0000</td>
<td>1.00</td>
<td>08/31/2019</td>
</tr>
</tbody>
</table>

**Subcontract for Project:** Glider-Based Observations of Hydrography and Nutrients in Rhode Island Sound in Support of RI C-AIM Modeling  
**Effective Dates:** May 1, 2018 to August 31, 2019.

**Administrative Contact (Post-Award):**  
**NAME:** Michael Liu  
**EMAIL:** michael.liu@brown.edu  
**PHONE:** 863-3630  
**FAX #:** 863-7262

**Sub recipient PI:**  
**NAME:** Benjamin Knutlein  
**ADDRESS:** Box 1929, Providence, RI 02912  
**EMAIL:** benjamin_knutlein@brown.edu

**Requisitioning Department:** GSO, Physical Oceanography  
**Requester:** David Ullman  
**Deliver to:** GSO, Box 67  
**EMAIL:** duillman@uri.edu

**Total Requisition Amount:** 1.00

<table>
<thead>
<tr>
<th>Period</th>
<th>Line-Schd-Dist</th>
<th>Accounts</th>
<th>Project</th>
<th>Activity</th>
<th>Amount</th>
<th>FAB</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY2020</td>
<td>1-1</td>
<td>5447-500-2002-0000</td>
<td>0007249</td>
<td>RESEARCH</td>
<td>1.00</td>
<td></td>
</tr>
</tbody>
</table>

For purchasing use only

<table>
<thead>
<tr>
<th>Buyer</th>
<th>Date</th>
<th>TypeCode</th>
<th>SR#</th>
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</thead>
</table>

<table>
<thead>
<tr>
<th>Buyer</th>
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<th>TypeCode</th>
<th>PO#</th>
<th>Rev.#</th>
<th>Clerk</th>
<th>Date</th>
</tr>
</thead>
</table>

**IN THIS AOC REQUISITION EXAMPLE – Funds are being decreased from the PO:**

**Line 1 describes the change and the PO #**

**Header comments describe the subcontract information, time period and contacts.**
Sample #8:

**Subcontract Requisition**
This Form is for Internal Use Only

Suggested Vendor Name: University of Alberta
Vendor Address: Financial Services, 3rd Floor Edmonton, Canada, AB T6G 2M7
Vendor#: 0000045183

**Ship To:** University of Rhode Island Biomedical & Pharm Sciences Beaurep Ctr, 140 Flaggy Road, RM 470 Kingston, RI 02881

---

**IN THIS AOC REQUISITION EXAMPLE – Funds are being added to the PO, a new CFS is being added and the date of the project is being extended:**

Lines 1 through 4 describe the changes being made:

Header comments describe the attachments as well as explaining the fund changes to the PO.
**IN THIS NEW PURCHASE ORDER EXAMPLE:**

Line 1 is \(<\$25K (Subject to F&A);\)

Line 2 is \(>\$25K (Not subject to F&A);\)

Header comments describe an attachment and the period of performance.
### Subcontract Purchase Order

**Date Ordered:** 6/23/2019  
**Revision:**  
**P.O. #:** 000154808  
**Payment Terms:** Net 30  
**Freight Terms:** FOB DESTINATION  
**Ship Via:**  
**Buyer:** Clinic, Francine  
**Phone:** 401/874-2824  
**Due Date:** 12/30/2019  
**Requester:** Lane, Megan  
**Phone:** 401/874-6065  
**Requester Email:** megan.lane@uri.edu  

**Bill To:** Accounting - ap@uri.edu  
URI, Carrelli Admin. Bldg.  
75 Lower College Rd., Suite 1  
Kingston RI 02881  
(401) 874-7553  

**Ship To:** University of Rhode Island  
Psychology Department  
142 Hagg Rd., 214 Chafee Hall  
Kingston RI 02881  

**Tax Exempt?** Y  
**Tax Exempt ID:** 199  

<table>
<thead>
<tr>
<th>Line</th>
<th>Item/Description</th>
<th>Quantity</th>
<th>UOM</th>
<th>PO Price</th>
<th>Extended Amount</th>
<th>Due Date</th>
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<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### NOTES TO VENDOR:

**The Above PO# MUST APPEAR ON ALL INvoices**

Rhode Island law requires that an MSDS be provided for each product containing hazardous chemicals as defined by OSHA and Rhode Island regulations. Please include a copy with the shipment and send an additional copy to the Department of Public Safety, Environmental Health and Safety, 177 Plains Road, Kingston, RI 02881.

This purchase is made in accordance with the General Conditions of Purchase of the Board of G o vernors for Higher Education, copies of which are available at http://web.uri.edu/purchasing/.

Every person or business entity providing goods or services at a cost of $5000 or more is required to file an annual campaign contribution with the RI State Board of Elections even if no campaign contributions have been made. (RI General Law 17-27) Forms can be obtained at the Board of Elections, Campi gn Finance Division, 50 Branch Avenue, Providence, RI 02904 (401-222-2056).

### Internal Use Only

<table>
<thead>
<tr>
<th>Period</th>
<th>Accounts</th>
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<th>Activity</th>
<th>Category</th>
<th>Requisition ID</th>
<th>PO Type</th>
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<tbody>
<tr>
<td>FY2020</td>
<td>5445-500-2120-0008</td>
<td>6007944</td>
<td>RESEARCH</td>
<td>446A</td>
<td>12/700.00</td>
<td>157438</td>
<td>Subcon</td>
</tr>
<tr>
<td>FY2020</td>
<td>5447-500-2120-0009</td>
<td>6007944</td>
<td>RESEARCH</td>
<td>447A</td>
<td>25,000.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**U R I Authorized Individual**

Date  

**Buyer**

---

*Certificate:* This certificate that the items listed above have been received and condition when accepted accordingly. This is to be filed with the appropriate individual at the University and the University Authorized Individual shall sign this certificate.

**URI Authorized Individual:**

Date

**Buyer:**
Sample #10 – page 1 of 2:

**Purchase Order - Change Order**

**Date Ordered**: 03/12/2016  
**Revision**: 4 - 04/02/2016  
**P.O.#**: 0000109952

**Payment Terms**  
**Freight Terms**  
**Net 30**:  
**For DESTINATION**:  
**Ship Via**:  
**Due Date**: 05/31/2019

**Supplier**: 0000000973  
**Brown University**  
**Office of Sponsored Projects**  
**PO Box 1929**  
**Providence RI 02912**

**Bill To**: University of Rhode Island  
**Cancer Prevention Research Center**  
**130 Flagship Rd**  
**Kingston RI 02881**

**Ship To**: University of Rhode Island  
**Cancer Prevention Research Center**  
**130 Flagship Rd**  
**Kingston RI 02881**

**Requester**: 401/874-2085  
**Requester Email**: teri.lynn@uri.edu

<table>
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<tr>
<th>Line-Sch</th>
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<th>Quantity</th>
<th>UOM</th>
<th>PO Price</th>
<th>Extended Amt</th>
<th>Due Date</th>
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<tbody>
<tr>
<td>1-1</td>
<td>Advice of change to subaward $63,333 for the period of performance 6/1/16-5/31/16.</td>
<td>1.00</td>
<td>TOT</td>
<td>73,170.00</td>
<td>73,170.00</td>
<td>05/31/2019</td>
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- **Current P.O. Amount**: $63,333
- **This Change**: $9,837
- **New P.O. Amount**: $73,170

- **Purchase Order Example**:
  - **Line 1** shows the increase to the subaward. **Line 2 is >$25K (Not subject to F&A)**;
  - **Header comment explains the reason why and agreement attachment**.

**Modification #9 - Advice of change to increase PO 44,994 for a new total of $231,994 for the period 06/01/16 - 5/31/19**

**Agreement**

---

**Certificate**

I hereby certify that the information herein is true and complete.  
I have reviewed the information and agree to the accuracy and truthfulness of this document.  
I understand that it is my responsibility to ensure the information is accurate and complete.  
I authorize the UPT Authorized Individual to sign this certificate.

**Buyer**

---

Purchasing Subcontract Requisition (SC) Rev 8/2019  
Page 68
Purchase Order - Change Order

Date Ordered: 09/12/2018
Revision: 4 - 04/02/2019
P.O.#: 0000109962

Payment Terms: Net 30
Freight Terms: F.O.B. DESTINATION
Ship Via: M:D:M

Buyer: Cabral, Alice
Phone: 401/874-5086
Due Date: 05/21/2019

Requestor: Hodgson, Terri Lyn
Phone: 401/874-2295
Requestor Email: thodson@uri.edu

Bill To: University of Rhode Island
Cancer Prevention Research Center
130Flagg Rd
Kingston RI 02881

Ship To: University of Rhode Island
Cancer Prevention Research Center
130 Flagg Rd
Kingston RI 02881

Tax Exempt? Y
Tax Exempt Id: 189

Line # Sch Item/Description Quantity UOM PO Price Extended Amt Due Date

NOTES TO VENDOR:
THE ABOVE PO# MUST APPEAR ON ALL INVOICES
Rhode Island law requires that an MSDS be provided for each product containing hazardous chemicals as defined by OSHA and Rhode Island regulations. Please include a copy with the shipment and send an additional copy to the Department of Public Safety, Environmental Health and Safety, 177 Plains Road, Kingston, RI 02881

This purchase is made in accordance with the General Conditions of Purchase of the Board of Governors for Higher Education, copies of which are available at http://web.uri.edu/purchasing/

Every person or business entity providing goods or services at a cost of $500 or cumulated value is required to file an affidavit regarding political campaign contributions with the RI State Board of Elections even if no reportable campaign contributions have been made. (RI General Law 17-27) Forms can be obtained at the Board of Elections, Campaign Finance Division, 50 Branch Avenue, Providence, RI 02904 (401-222-2056).

<table>
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<th>Activity</th>
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<th>Requisition #</th>
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<tr>
<td>FY2017</td>
<td>5446-500-2117-0900</td>
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<td>446A</td>
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<td>123983</td>
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<tr>
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<td>0005749</td>
<td>RESEARCH</td>
<td>446A</td>
<td>98,785.00</td>
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<td>0005749</td>
<td>RESEARCH</td>
<td>446A</td>
<td>44,994.00</td>
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</tr>
</tbody>
</table>

x

URI Authorized Individual

Date

Buyer

Disclaimer:
I certify that the terms of this document have been read and understood and are accepted by me. This is a
Jurat and/or Notary certified against the accountants certified and not hot
binding format. Can only purchase under this contract.

[Signature]

Purchasing Subcontract Requisition (SC) Rev 8/2019
Page 69
## IN THIS AOC PURCHASE ORDER EXAMPLE:
The Line Comment for Line 1 shows the date extension and new Period of Performance.

**Header comment contains the agreement attachment.**

**Notes to Vendor:**
The above PO# must appear on all invoices.

Rhode Island law requires that an MSDS be provided for each and Rhode Island regulations. Please include a copy with the Public Safety, Environmental Health and Safety, 177 Plains Rd.

This purchase is made in accordance with the General Conditions of Purchase of the State of Rhode Island and Providence

Education, copies of which are available at http://web.uri.edu/purchasing/

Every person or business entity providing goods or services at a cost of $5000 cumulated value is required to file an affidavit regarding political campaign contributions with the RI State Board of Elections even if no reportable campaign contributions have been made. (RI General Law 17-27) Forms can be obtained at the Board of Elections, Campaign Finance Division, 60 Branch Avenue, Providence, RI. 02904 (401-222-2056).

---

### Subcontract Purchase Order

**THE UNIVERSITY OF RHODE ISLAND**

---

**Supplier:**
Brown University
The Education Alliance
222 Richmond St. Ste 300
Providence RI 02903-4226

---

**Bill To:**
Accounting - aprec@eal.uri.edu
URI, Carlotti Admin. Bldg.
75 Lower College Rd., Suite 1
Kingston RI 02881
(401) 874-7553

**Ship To:**
University of Rhode Island
GSO Research
NBC, 20 Reserving Rd.
Narragansett RI 02882-1197

---

### IN THIS AOC PURCHASE ORDER EXAMPLE:

The Line Comment for Line 1 shows the date extension and new Period of Performance.

**Header comment contains the agreement attachment.**

---

### NOTES TO VENDOR:

The above PO# must appear on all invoices.

Rhode Island law requires that an MSDS be provided for each and Rhode Island regulations. Please include a copy with the Public Safety, Environmental Health and Safety, 177 Plains Rd.

This purchase is made in accordance with the General Conditions of Purchase of the State of Rhode Island and Providence

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---

### IN THIS AOC PURCHASE ORDER EXAMPLE:

The Line Comment for Line 1 shows the date extension and new Period of Performance.

**Header comment contains the agreement attachment.**

---

### NOTES TO VENDOR:

The above PO# must appear on all invoices.

Rhode Island law requires that an MSDS be provided for each and Rhode Island regulations. Please include a copy with the Public Safety, Environmental Health and Safety, 177 Plains Rd.

This purchase is made in accordance with the General Conditions of Purchase of the State of Rhode Island and Providence

Education, copies of which are available at http://web.uri.edu/purchasing/

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## Subcontract Purchase Order

### Details:
- **Date Ordered**: 12/03/2019
- **Revision**: P.O. # 0000138948
- **Supplier**: 0000000973 Brown University
- **Bill To**: Accounting - aprec@etats.uri.edu
- **Ship To**: University of Rhode Island GSO Research NBC, 20 Receiving Rd. Narragansett RI 02882-1197
- **Line Item**: 1

### Tax Exempt Info:
- **Tax Exempt**: Y
- **Tax Exempt ID**: 189

### Internal Use Only:
- **Category**: Research
- **Regulation ID**: 6,760.17
- **PO Type**: Subcon

---

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<td>0007240</td>
<td>RESEARCH</td>
<td>447A</td>
<td>124432</td>
<td>Subcon</td>
<td></td>
</tr>
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---

**Notes:**
- The final signature has been redacted.
- This form is for internal use only and is not meant for external distribution.

---

**URI Authorized Individual**

---

**Buyer**

---

**Date**
## Subcontract Purchase Order

**The University of Rhode Island**

**Supplier:** 0000045183  
University of Alberta  
Financial Services, 3rd Floor  
Administration Building  
Edmonton, Canada AB T6G 2M7  
Canada

**Bill To:**  
Accounting - aprec@etal.uri.edu  
URI, Carlill Admin., Bldg.  
75 Lower College Rd., Suite 1  
Kingston RI 02881  
(401) 874-7653  
*Signature:* Katharina Quinlan

**Tax Exempt?** Y  
**Tax Exempt ID:** 189

<table>
<thead>
<tr>
<th>Line No.</th>
<th>Item Description</th>
<th>Quantity</th>
<th>UOM</th>
<th>PO Price</th>
<th>Extended Amt</th>
<th>Due Date</th>
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<td>65,933.00</td>
<td>06/30/2019</td>
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</table>

**Modification #1:** Advice of Change to approve carry forward in the amount of $34,672.90 from Year 1 to Year 2.

**Prior PO Total:** $73,055  
**Increase:** $69,930  
**New PO Total:** $142,985

**Subagreement**

**Modification #2:** Advice of Change to increase PO $69,930 for Year 2 finding and to extend the end date to 06/30/2019.

**Authorized Individual:**  
*Signature:* Buyer

---

**IN THIS AOC PURCHASE ORDER EXAMPLE:**  
Line 3 was added for the carry forward amount of funds from Year 1 to Year 2 and the Line Comment explains this;  
Line 4 was added as an increase to Year 2 funding with the date extension.

Header comment contains the SubAgreement attachment.
Subcontract Purchase Order

Date Ordered: 04/12/2018
Revision: 1 - 10/03/2018
P.O.#: 0000334157

Payment Terms: Net 30
Freight Terms: Ship Via
Net 30
F.O.S.D.

Buyer:
Campagnale, Kileen
Phone: 401/924-5665
Due Date: 04/30/2019

Requester:
Graywolf, Terry G
Phone: 401/924-5665
Requester Email: 401/924-5665

Bill To:
Accounting - aprac@etalurl.edu
URI, Carlotti Admin. Bldg.,
75 Lower College Rd., Suite 1
Kingston RI 02881
(401) 924-5665

Ship To:
Katharina Quinlan

Line- Sch Item/Description Quantity UOM PO Price Extended Amt Due Date

NOTES TO VENDOR:
THE ABOVE PO MUST APPEAR ON ALL INVOICES
Rhode Island law requires that an MSDS be provided for each product containing hazardous chemicals as defined by OSHA and Rhode Island regulations. Please include a copy with the shipment and send an additional copy to the Department of Public Safety, Environmental Health and Safety, 177 Plains Road, Kingston, RI 02881.

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Author: URI Authorized Individual
Date
Buyer

Purchasing Subcontract Requisition (SC) Rev 8/2019