

THE  
UNIVERSITY  
OF RHODE ISLAND

# **PeopleSoft Purchasing Subcontract Requisition (SC)**



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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/>.

## ➤ 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
  - 4. Subrecipient Statement of Work.
- 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/> for contact information.**

## ➤ Logging Into Peoplesoft

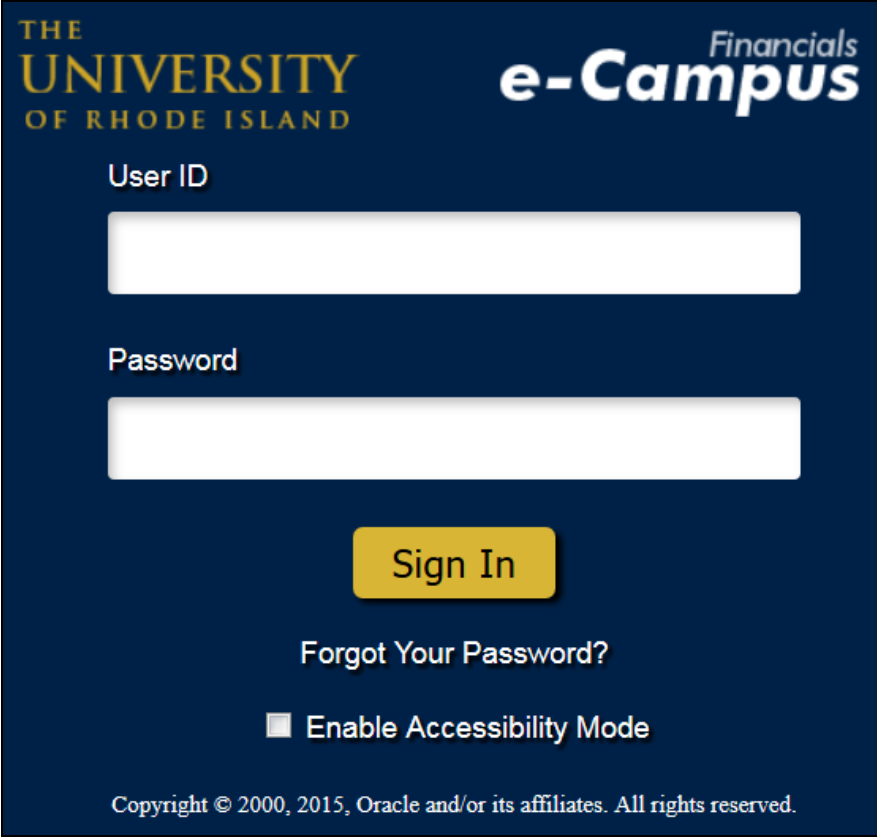
PeopleSoft is to be used in accordance with the URI Access and Compliance Data Confidentiality Statement.

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:

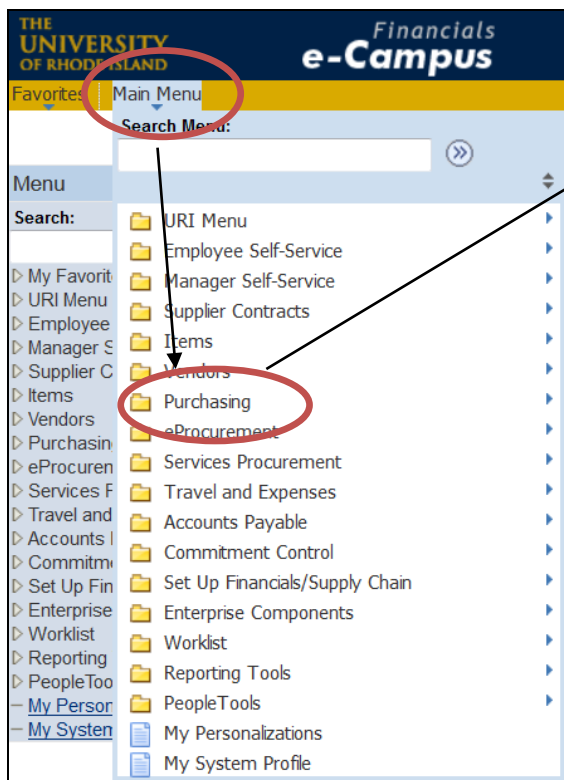
<https://appfsprod.uri.edu:9301/psp/fsprod/EMPLOYEE/ERP/?cmd=login&languageCd=ENG&>



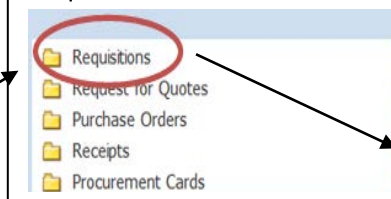
The image shows the login page for The University of Rhode Island's e-Campus Financials. The page has a dark blue background. At the top left is the university's logo, and at the top right is the 'e-Campus Financials' logo. Below the logos are two white input fields for 'User ID' and 'Password'. A yellow 'Sign In' button is centered below the password field. Below the button are links for 'Forgot Your Password?' and a checkbox for 'Enable Accessibility Mode'. At the bottom, a copyright notice reads: 'Copyright © 2000, 2015, Oracle and/or its affiliates. All rights reserved.'

## ➤ To Add a New Requisition

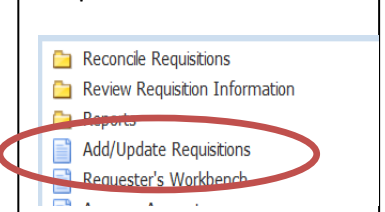
From the Main Menu, choose Purchasing:



Then choose Requisitions:



Then choose Add/Update Requisitions:



**Requisitions**

Find an Existing Value   Add a New Value

Business Unit: URIPS

Requisition ID: NEXT

**To add a new Requisition, Click** Add



- 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/> .
- 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 login;  
**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:

**Maintain Requisitions**

**Requisition**

Business URIPS      Requires State Approval: ☐      Resubmit      Status Open

Unit      Requisition NEXT      ID      Budget Status Not Chk'd

Requisition Name      Copy From      Return: ☐      ☒ Hold From Further Processing

**Header** ?

\*Requester kristenbellotti      Bellotti, Kristen  
\*Requisition Date 03/20/2019      Requester Info  
Origin KNG      Kingston  
\*Currency Code USD      Dollar  
Accounting Date 03/20/2019

[Requisition Defaults](#)      Add Comments      Amount Summary ?

Total Amount 0.00 USD

**Add Items From** ?

Purchasing Kit      Catalog  
Item Search      Requester Items

**Line** ?

Personalize | Find | View All | First 1 of 1 Last

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		0.0000			0	0.00	Open

View Printable Version      \*Go to ...More...

Save      Notify      Refresh      Add



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/>

**Requisition Defaults**

Business Unit URIPS Requisition Date 03/20/2019  
 Requisition ID NEXT Status Open

**Default Options** ?

☐ **Default** If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

☒ **Override** If you select this option, all default values entered on this page override the default values found in the default hierarchy, only non-blank values are assigned.

**Line**

Buyer  Unit of Measure   
 Supplier  Supplier Location   
 Category  [Supplier Lookup](#)

**Schedule**

Ship To  \*Distribute By Amount  
 Due Date  Ship Via BEST WAY  
 Ultimate Use Code  Freight Terms FOB DEST  
 Attention To  One Time Address

**Distribution**

SpeedChart

**Distributions**

Details Asset Information

Dist	Percent	GL Unit	Account	Fund	Dept	Program	Bud Ref	PC Bus Unit	Project	Activity
1	<input type="text"/>	URIPS	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

OK Cancel Refresh

## ➤ 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 

**Supplier Search**

**Search Criteria**

Name  Short Name

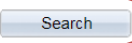
Alternate Supp Name


City  State





Country  Postal

Class  Type

Max Rows





**Search Results**     First 1 of 1 Last

Sel	Supplier ID	Location	Address	Short Supplier Name	Supplier Name	Withholding Applicable
<input type="checkbox"/>						

Supplier Detail  Address

Select the Supplier from the Search Results by typing a check (v) 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 

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

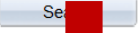
**Supplier Search**





**Search Criteria**

Name  Alternate Supp Name

City  Country

Class  Max Rows



**Search Results**     First 1 of 1 Last

Sel	Supplier ID	Location	Address	Short Supplier Name	Supplier Name	Withholding Applicable
<input type="checkbox"/>	0000003956	MAIN	2	MARINEACOU-001	Marine Acoustics Inc	
<input type="checkbox"/>	0000003958	MAIN	1	MARINERESC-001	Marine Rescue Products Inc	N
<input type="checkbox"/>	0000008440	MAIN	1	MARINECONS-001	Marine Consignment of Wickford LLC	Y
<input type="checkbox"/>	0000013499	MAIN	2	MARINEBIOL-001	Marine Biological Laboratory	N

Supplier Detail  Address

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/>.


Click here to preview address

➤ **Category**


**Category** – is a classification of goods/services. **DO NOT select the Category here for a Subcontract Req.**

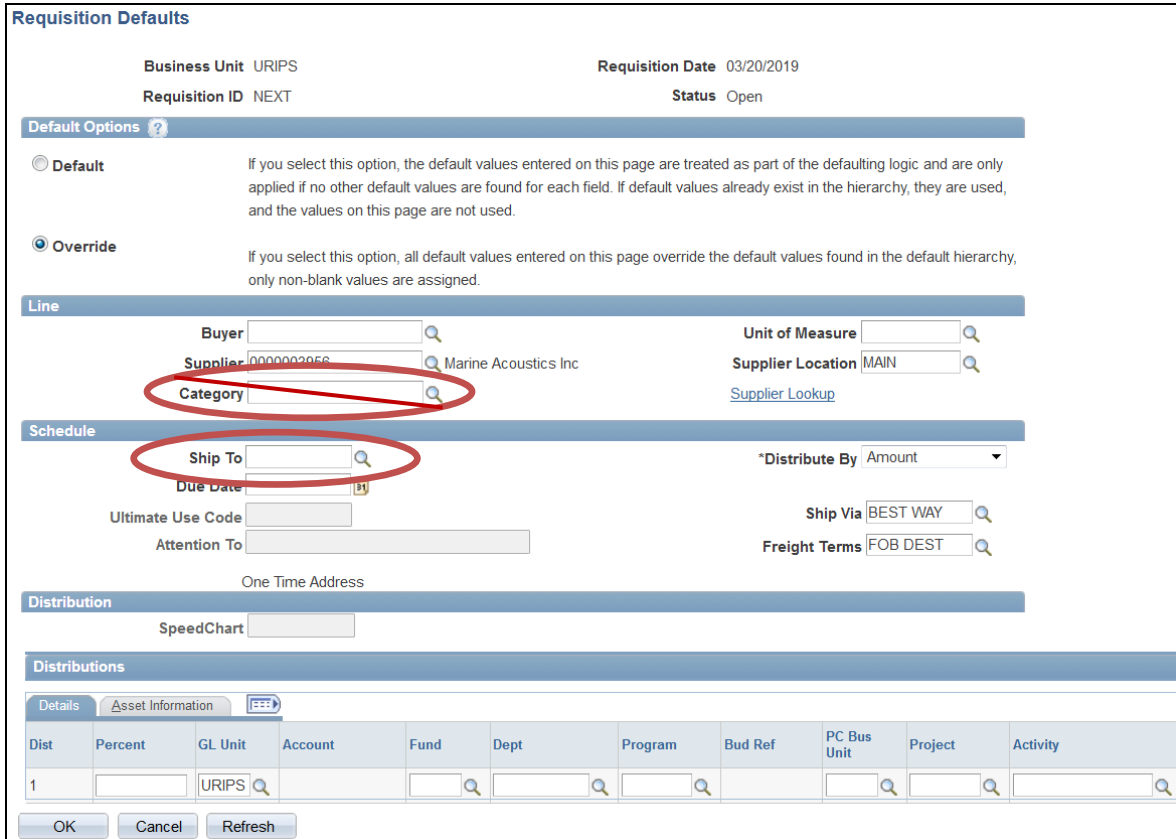
➤ **Ship To**


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;

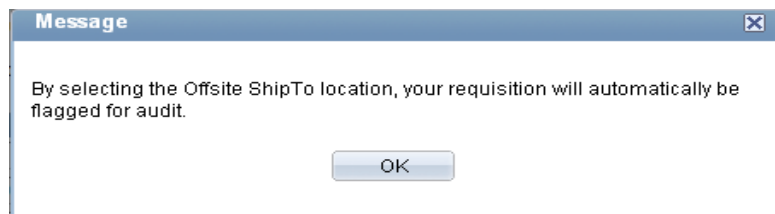
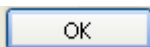
OR

- Search by the Department Name by clicking the  next to the Ship To field, type the Department Name in the Description field, click **Look Up** 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:

Click



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](#).

## ➤ Due Date & Distribute By

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](#).

**Requisition Defaults**

Business Unit URIPS Requisition Date 03/20/2019  
 Requisition ID NEXT Status Open

**Default Options** ?

☐ **Default**  
 If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

☒ **Override**  
 If you select this option, all default values entered on this page override the default values found in the default hierarchy, only non-blank values are assigned.

**Line**

Buyer  Unit of Measure   
 Supplier 0000003956 Marine Acoustics Inc Supplier Location MAIN  
 Category  [Supplier Lookup](#)

**Schedule**

Ship To 0015\_001\_S GSO Marine Office  
**Due Date**  **\*Distribute By** Amount  
 Ultimate Use Code  Ship Via BEST WAY  
 Attention To  Freight Terms FOB DEST

One Time Address

**Distribution**

SpeedChart

**Distributions**

Details Asset Information

Dist	Percent	GL Unit	Account	Fund	Dept	Program	Bud Ref	PC Bus Unit	Project	Activity
1	<input type="text"/>	URIPS	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

OK Cancel Refresh

**“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  to return to the main Requisition screen.

**Requisition Defaults**

Business Unit URIPS Requisition Date 03/20/2019  
 Requisition ID NEXT Status Open

**Default Options** ?

☐ **Default** If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

☒ **Override** If you select this option, all default values entered on this page override the default values found in the default hierarchy, only non-blank values are assigned.

**Line**

Buyer  Unit of Measure   
 Supplier 0000003956 Marine Acoustics Inc Supplier Location MAIN  
 Category  [Supplier Lookup](#)

**Schedule**

Ship To 2815\_001\_S GSO Marine Office \*Distribute By Amount  
 Due Date  Ship Via BEST WAY  
 Ultimate Use Code  Freight Terms FOB DEST  
 Attention To

One Time Address


**Distribution**

SpeedChart

**Distributions**

Details Asset Information

Dist	Percent	GL Unit	Account	Fund	Dept	Program	Bud Ref	PC Bus Unit	Project	Activity
1	<input type="text"/>	URIPS	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

 Cancel Refresh

Return to the Main Requisition Screen

## ➤ Line Items – Line 1

*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)

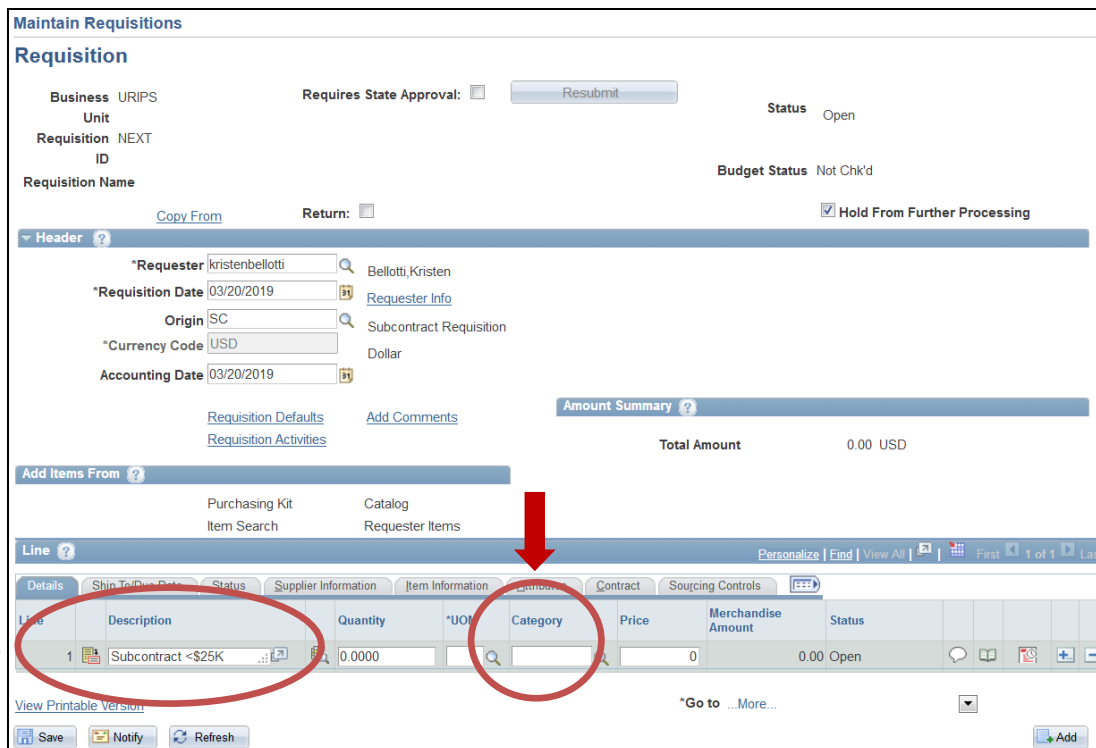
\*If the Subcontract is not subject to F&A: all costs should be entered into Line 1 as “Subcontract >\$25K (not subject to F&A)”:

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.

Enter the Description for Line 1:

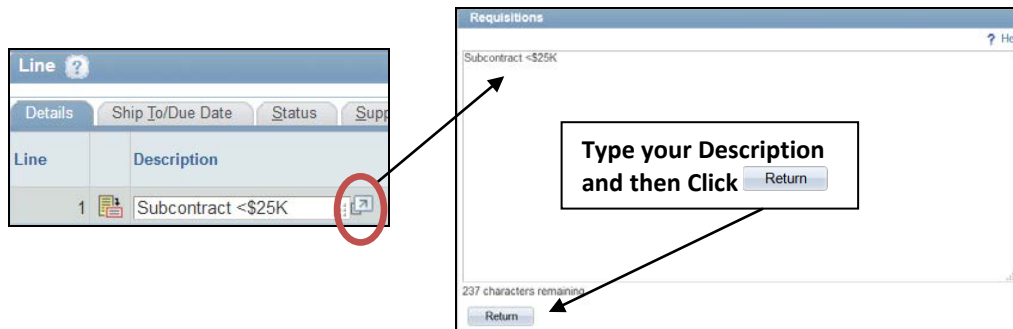


The screenshot displays the 'Maintain Requisitions' interface. The 'Requisition' header shows details for Business Unit 'URIPS', Requisition ID 'NEXT', and Requester 'Bellotti, Kristen'. The 'Line' table at the bottom contains one item with the following details:

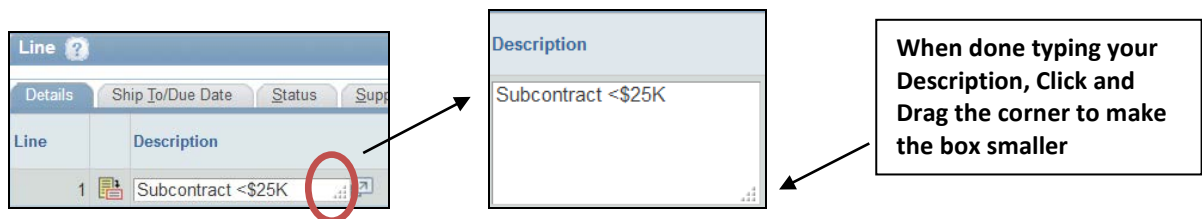
Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Subcontract <\$25K	0.0000			0	0.00	Open

**There are 4 ways to enter the Line Item Description:**

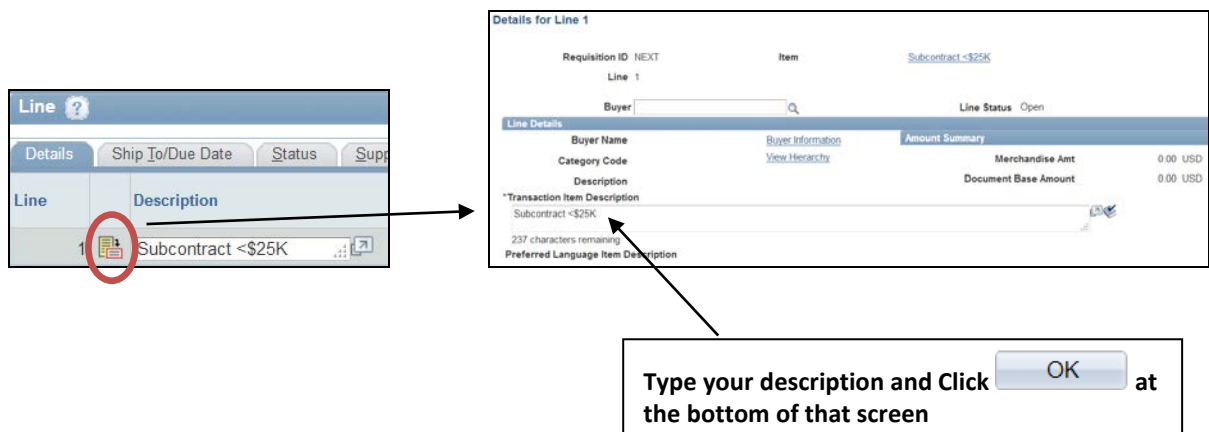
**1 – Click on the  at the end of the Description to access the entire Description area:**



**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*):**



## ➤ Quantity

The Quantity for a Subcontract Requisition is typically 1:

The screenshot shows the 'Maintain Requisitions' form. In the 'Header' section, the 'Requester' is 'Bellotti, Kristen' and the 'Requisition Date' is '03/20/2019'. The 'Line' table at the bottom has a single row with 'Quantity' set to '1.0000', which is circled in red.

## ➤ Unit of Measure

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

The screenshot shows the 'Line' table with columns: Line, Description, Quantity, \*UOM, Category, Price, Merchandise Amount, and Status. The 'UOM' field for Line 1 is 'TOT' and is circled in red.

## ➤ Category

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

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

The screenshot shows the 'Line' table with columns: Line, Description, Quantity, \*UOM, Category, Price, Merchandise Amount, and Status. The 'Category' field for Line 1 is '447A' and the 'Price' field is '25,000.0000'. Both fields are circled in red.

## ➤ Price

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.**

**Maintain Requisitions**

**Requisition**

Business Unit: URIPS  
 Requisition ID: NEXT  
 Requisition Name:   
 Requires State Approval: ☐ [Resubmit](#)  
 Status: Open  
 Budget Status: Not Chk'd  
[Copy From](#) [Return](#) ☐ ☒ Hold From Further Processing

**Header**

\*Requester: kristenbellotti Bellotti, Kristen  
 \*Requisition Date: 03/20/2019 [Requisition Info](#)  
 Origin: SC Subcontract Requisition  
 \*Currency Code: USD Dollar  
 Accounting Date: 03/20/2019

[Requisition Defaults](#) [Add Comments](#) [Amount Summary](#)

Total Amount: 25,000.00 USD

**Add Items From**

Purchasing Kit Catalog  
 Item Search Requirer Items

**Line**

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Subcontract <\$25K	1.0000	TOT	447A	25,000.0000	25,000.00	Open

[View Printable Version](#) [Go to ...More...](#)

[Save](#) [Notify](#) [Refresh](#) [Add](#)

**At the end of the line, Click the Schedule icon - :**

### ➤ Ship To

**Defaults from the Requisition Defaults page:**

**Maintain Requisitions**

**Schedule**

Business Unit: URIPS  
 Requisition ID: NEXT  
 Requisition Date: 03/20/2019  
 Status: Open  
[Return to Main Page](#)

**Line**

Line	Item	Subcontract <\$25K	Quantity	1.0000	Total	Merchandise Amt	25,000.00 USD
1	Item	Subcontract <\$25K	Quantity	1.0000	Total	Merchandise Amt	25,000.00 USD

**Schedule**


Sched	*Ship To	Ship To Control	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	2815_0	K	1.0000	25,000.0000	25,000.00		Bellotti, Kristen	Active

[Add Ship To Comments](#) [Save](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)

### ➤ 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

Look Up Ship To Control

Field Value: begins with

Translate Long Name: begins with

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-3 of 3 Last

Field Value	Translate Long Name
D	Direct Delivery
G	GSO Central Receiving
K	Kingston Central Receiving

### 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 Tootell 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 [Add Ship To Comments](#).

\* “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

[Add Ship To Comments](#)

hyperlink. **Note:** This action is performed once on Line 1/Schedule 1 only.

**Maintain Requisitions**

**Schedule**

Business Unit URIPS Requisition Date 03/20/2019  
 Requisition ID NEXT Status Open

[Return to Main Page](#)

Line	Item	Subcontract <\$25K	Quantity	1.0000	Total	Merchandise Amt	25,000.00 USD	
<b>Schedule</b> <a href="#">Personalize</a>   <a href="#">Find</a>   <a href="#">View All</a>   <a href="#">First</a>   <a href="#">1 of 1</a>   <a href="#">Last</a>								
<b>Details</b>								
Sched	*Ship To	Ship To Control	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	2815_0	K	1.0000	25,000.0000	25,000.00		Bellotti, Kristen	Active

[Add Ship To Comments](#)

[Save](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)

**\*\* 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](#)

**Requisition Ship To Comments**

Business Unit URIPS Requisition Date 03/20/2019  
 Requisition ID NEXT Status Open

\*Sort Method Comment Time Stamp \*Sort Sequence Ascending [Sort](#)

**Comments** [Find](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#)

Use Standard Comments **Ship To** 2815\_001\_S **Comment Status** Active [Inactivate](#) [+](#)

Bruce Corliss

☐ Send to Supplier ☐ Show at Receipt  
☐ Show at Voucher

**Associated Document**

Attachment	Attach	View	Delete	Email
From -> REQ URIPS-NEXT				

[OK](#) [Cancel](#) [Refresh](#)

When the PO is printed, the Ship To address will look like this:

**Ship To:** URI Central Receiving  
Kingston, RI 02881  
CMB CBLS  
120 Flagg Rd., Room 098  
**Attention:** Bruce Corliss

PeopleSoft automatically adds the word "Attention".

**You will then be returned to the Maintain Requisitions – Schedule page:**

**Maintain Requisitions**

**Schedule**

Business Unit: URIPS      Requisition Date: 03/20/2019  
Requisition ID: NEXT      Status: Open

[Return to Main Page](#)

**Line** Find | View All | First | 1 of 1 | Last

1	Item	Subcontract <\$25K	Quantity	1.0000	Total	Merchandise Amt	25,000.00 USD
---	------	--------------------	----------	--------	-------	-----------------	---------------

**Schedule** Personalize | Find | View All | First | 1 of 1 | Last

**Details** PDF

Sched	*Ship To	Ship To Control	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	2815_0	K	1.0000	25,000.0000	25,000.00		Bellotti, Kristen	Active

[Add/Edit Comments](#)

[Save](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)

## ➤ Due Date

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 

**Maintain Requisitions**

**Schedule**

Business Unit URIPS Requisition Date 03/20/2019  
 Requisition ID NEXT Status Open

[Return to Main Page](#)

Line	Item	Subcontract <\$25K	Quantity	1.0000	Total	Merchandise Amt	25,000.00 USD	
<b>Schedule</b> <a href="#">Personalize</a> <a href="#">Find</a> <a href="#">View All</a> <a href="#">First</a> <a href="#">1 of 1</a> <a href="#">Last</a>								
<b>Details</b>								
Sched	*Ship To	Ship To Control	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	2815_0	K	1.0000	25,000.0000	17,500.00	06/30/2021	Kellotti, Kristen	Active

[Add/Edit Comments](#)

Click on the Distribution  icon.

You will receive this message:

**Message**

Warning -- date out of range. (15,9)

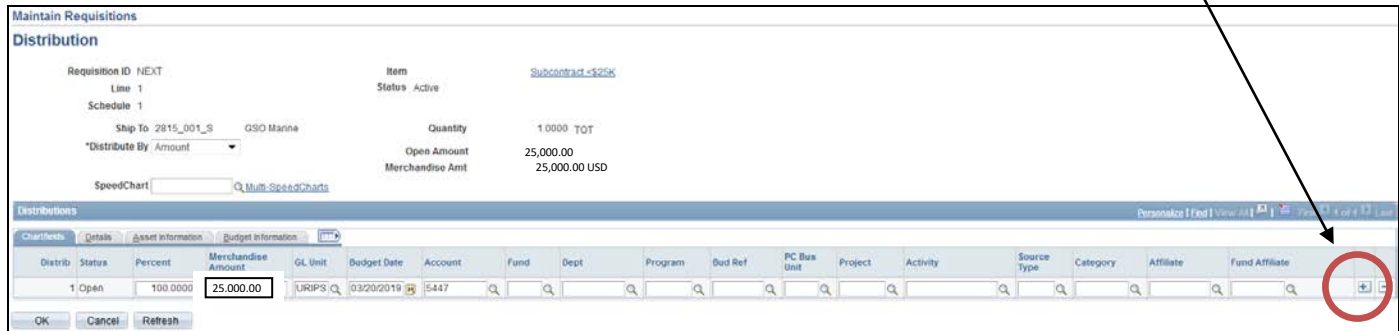
The date entered is either more than 30 days in the past or 30 days in the future. This is not normally true for this date. Either acknowledge that the date is OK, or correct the entered date.

Click

**You will now enter the Distributions for the Line:**

## ➤ Entering Distributions on the Line

When Distributing by more than one ChartField String, Click  to add the desired number of rows:



Maintain Requisitions  
Distribution

Requisition ID: NEXT  
Line: 1  
Schedule: 1  
Ship To: 2815\_001\_S GSO Marine  
Quantity: 1.0000 TOT  
Open Amount: 25,000.00  
Merchandise Amt: 25,000.00 USD

SpeedChart:  Multi-SpeedCharts

Distributions

Distrib	Status	Percent	Merchandise Amount	GL Unit	Budget Date	Account	Fund	Dept	Program	Bud Ref	PC Bus Unit	Project	Activity	Source Type	Category	Affiliate	Fund Affiliate
1	Open	100.0000	25,000.00	URRPS	03/20/2019	5447											

OK Cancel Refresh

Enter the desired number of rows. For example, if the purchase is being charged to 2 ChartField Strings, click

OK

to add 1 row.

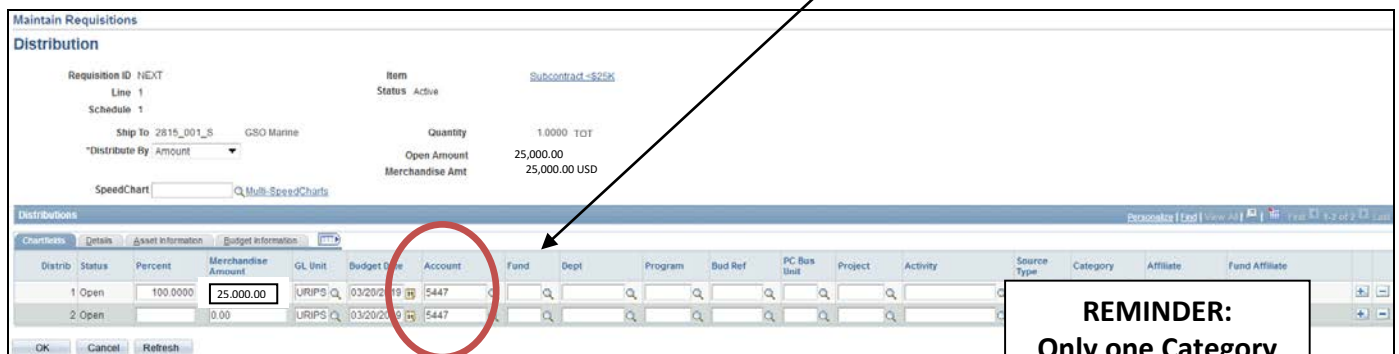
Enter number of rows to add:

1

OK

Cancel

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 #**



Maintain Requisitions  
Distribution

Requisition ID: NEXT  
Line: 1  
Schedule: 1  
Ship To: 2815\_001\_S GSO Marine  
Quantity: 1.0000 TOT  
Open Amount: 25,000.00  
Merchandise Amt: 25,000.00 USD

SpeedChart:  Multi-SpeedCharts


Distributions

Distrib	Status	Percent	Merchandise Amount	GL Unit	Budget Date	Account	Fund	Dept	Program	Bud Ref	PC Bus Unit	Project	Activity	Source Type	Category	Affiliate	Fund Affiliate
1	Open	100.0000	25,000.00	URRPS	03/20/2019	5447											
2	Open	0.00	0.00	URRPS	03/20/2019	5447											

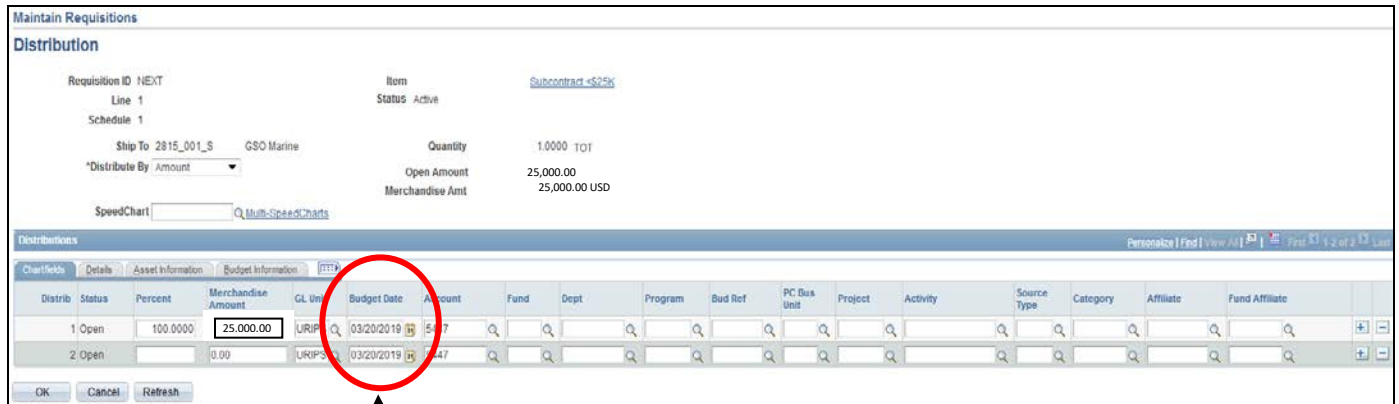
OK Cancel Refresh

**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.




Maintain Requisitions

Distribution

Requisition ID: NEXT  
Line: 1  
Schedule: 1  
Ship To: 2815\_001\_S GSO Marine  
Quantity: 1.0000 TOT  
Open Amount: 25,000.00  
Merchandise Amt: 25,000.00 USD  
Subcontract: <\$25K

\*Distribute By: Amount

SpeedChart:  Multi-SpeedCharts

Distrib	Status	Percent	Merchandise Amount	GL Unit	Budget Date	Account	Fund	Dept	Program	Bud Ref	PC Bus Unit	Project	Activity	Source Type	Category	Affiliate	Fund Affiliate
1	Open	100.0000	25,000.00	URIPS	03/20/2019	5447											
2	Open		0.00	URIPS	03/20/2019	5447											

OK Cancel Refresh

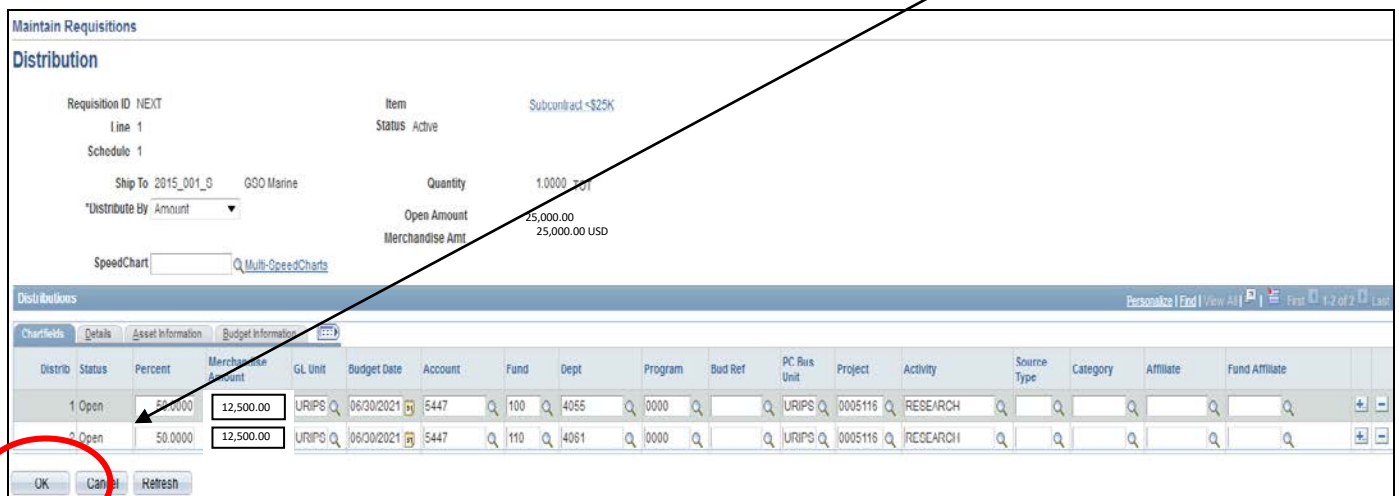


*The Budget Date defaults to the current date.*

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.




Maintain Requisitions

Distribution

Requisition ID: NEXT  
Line: 1  
Schedule: 1  
Ship To: 2015\_001\_S GSO Marine  
Quantity: 1.0000 TOT  
Open Amount: 25,000.00  
Merchandise Amt: 25,000.00 USD  
Subcontract: <\$25K

\*Distribute By: Amount

SpeedChart:  Multi-SpeedCharts

Distrib	Status	Percent	Merchandise Amount	GL Unit	Budget Date	Account	Fund	Dept	Program	Bud Ref	PC Bus Unit	Project	Activity	Source Type	Category	Affiliate	Fund Affiliate
1	Open	50.0000	12,500.00	URIPS	06/30/2021	5447	100	4055	0000		URIPS	0005116	RESEARCH				
2	Open	50.0000	12,500.00	URIPS	06/30/2021	5447	110	4061	0000		URIPS	0005116	RESEARCH				

OK Cancel Refresh



Then Click [Return to Main Page](#) :

**Maintain Requisitions**

**Schedule**

Business Unit URIPS Requisition Date 03/20/2019  
 Requisition ID NEXT Status Open

[Return to Main Page](#)

Line	Item	Subcontract <\$25K	Quantity	1.0000	Total	Merchandise Amt	25,000.00 USD																		
<p><b>Schedule</b></p> <p>Personalize   Find   View All   First 1 of 1 Last</p> <p>Details</p> <table border="1"> <thead> <tr> <th>Sched</th> <th>*Ship To</th> <th>Ship To Control</th> <th>Quantity</th> <th>Price</th> <th>Merchandise Amount</th> <th>Due Date</th> <th>Attention To</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>2815_0</td> <td>K</td> <td>1.0000</td> <td>25,000.0000</td> <td>25,000.00</td> <td>06/30/2021</td> <td>Bellotti, Kristen</td> <td>Active</td> </tr> </tbody> </table> <p>Add/Edit Comments</p> <p>Save Notify Refresh Add Update/Display</p>								Sched	*Ship To	Ship To Control	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status	1	2815_0	K	1.0000	25,000.0000	25,000.00	06/30/2021	Bellotti, Kristen	Active
Sched	*Ship To	Ship To Control	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status																	
1	2815_0	K	1.0000	25,000.0000	25,000.00	06/30/2021	Bellotti, Kristen	Active																	

This will return you to the Main Requisition page:

**Maintain Requisitions**

**Requisition**

Business URIPS Unit  
 Requisition NEXT ID  
 Requisition Name

Requires State Approval: ☐ Resubmit Status Open  
 Budget Status Not Chk'd

Copy From Return: ☐ ☒ Hold From Further Processing

\*Requester kristenbellotti Bellotti, Kristen  
 \*Requisition Date 03/20/2019 Requisition Info  
 Origin SC Subcontract Requisition  
 \*Currency Code USD Dollar  
 Accounting Date 03/20/2019

Requisition Defaults Add Comments  
 Requisition Activities

Amount Summary  
 Total Amount 25,000.00 USD


Add Items From ?

Purchasing Kit Catalog  
 Item Search Requester Items

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Subcontract <\$25K	1.0000	TOT	447A	25,000.0000	25,000.00	Open

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 Reg only requires one line, go to Page 29 to Save the SC Reg](#)

Enter the desired number of rows (lines) to add.

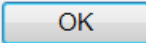
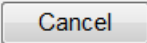
For example: if the Requisition is for a total of 2 lines, enter 1.

Click .

Two blank lines will be added to the PO

Enter number of rows to add:

1

## Maintain Requisitions

### Requisition

Business URIPS

Unit

Requisition NEXT

ID

Requisition Name

Requires State Approval: ☐



Status Open

Budget Status Not Chk'd

[Copy From](#)

Return: ☐

☒ Hold From Further Processing

▼ Header ?

\*Requester kristenbellotti

Bellotti, Kristen

\*Requisition Date 03/20/2019

[Requester Info](#)

Origin SC

[Subcontract Requisition](#)

\*Currency Code USD

Dollar

Accounting Date 03/20/2019

[Requisition Defaults](#)

[Add Comments](#)

[Requisition Activities](#)

[Refer to the Sample SC Requisitions starting on Page 57](#) to see examples of different Reqs from various departments.

Enter the Description for Line 2:

Catalog

Requester Items

Line ?										Personalize   Find   View All   First 1-2 of 2 Last									
Details   Ship To/Due Date   Status   Supplier Information   Item Information   Attributes   Contract   Sourcing Controls																			
Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status												
1	Subcontract <\$25K	1.0000	TOT	447A	25,000.0000	25,000.00	Open												
2	Subcontract >\$25K	1.0000	TOT	446A	50,000.0000	50,000.00	Open												

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:

**Maintain Requisitions**  
**Schedule**

Business Unit URIPS Requisition Date 03/20/2019  
 Requisition ID NEXT Status Open  
[Return to Main Page](#)

Line	Item	Subcontract >\$25K	Quantity	1.0000	Total	Merchandise Amt	50,000.00	USD
<b>Schedule</b> <a href="#">Personalize</a>   <a href="#">Find</a>   <a href="#">View All</a>   <a href="#">First</a>   <a href="#">1 of 1</a>   <a href="#">Last</a>								
<b>Details</b>								
Sched	*Ship To	Ship To Control	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	2815_0	K	1.0000	50,000.00000	50,000.00	06/30/2021	Bellotti, Kristen	Active

[Add/Edit Comments](#)

[Save](#)
[Notify](#)
[Refresh](#)
[Add](#)
[Update/Display](#)

Click on the Distribution  icon.

You will receive this message:

**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.

OK

Click

OK

You will now enter the Distributions for this Line:

Maintain Requisitions

**Distribution**

Requisition ID: NEXT  
Line: 1  
Schedule: 1  
Ship To: 4046\_001\_B  
Capital Pr  
\*Distribute By: Amount  
SpeedChart: Multi-SpeedChart

Item: Construction of Residence Hall  
Status: Active  
Quantity: 1.0000 TOT  
Open Amount: 50,000.00  
Merchandise Amt: 50,000.00 USD

**Distributions**

Distrib	Status	Percent	Merchandise Amount	GL Unit	Budget Date	Account	Fund	Dept	Program	Bud Ref	PC Bus Unit	Project	Activity	Source Type	Category	Affiliate	Fund Affiliate
1	Open	100.0000	50,000.00	URIPS	03/04/2019	9655											

OK Cancel Refresh

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.

Maintain Requisitions

**Distribution**

Requisition ID: NEXT  
Line: 2  
Schedule: 1  
Ship To: 2815\_001\_S  
GSO Marine  
\*Distribute By: Amount  
SpeedChart: Multi-SpeedChart

Item: Subcontract - \$25K  
Status: Active  
Quantity: 1.0000 TOT  
Open Amount: 50,000.00  
Merchandise Amt: 50,000.00 USD

**Distributions**

Distrib	Status	Percent	Merchandise Amount	GL Unit	Budget Date	Account	Fund	Dept	Program	Bud Ref	PC Bus Unit	Project	Activity	Source Type	Category	Affiliate	Fund Affiliate
1	Open	50.0000	25,000.00	URIPS	06/30/2021	5446	100	4055	0000		URIPS	0005116	RESEARCH				
2	Open	50.0000	25,000.00	URIPS	06/30/2021	5446	110	4061	0000		URIPS	0005116	RESEARCH				

OK Cancel Refresh

When done, Click  to return to the Schedule page.

On the Schedule page, Click [Return to Main Page](#) :

**Maintain Requisitions** →

**Schedule**

Business Unit URIPS Requisition Date 03/20/2019  
 Requisition ID NEXT Status Open

[Return to Main Page](#)

Line	Item	Subcontract >\$25K	Quantity	1.0000	Total	Merchandise Amt	50,000.00	USD
Schedule								
Personalize   Find   View All   First 1 of 1   Last								
Details								
Sched	*Ship To	Ship To Control	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	2815_0	K	1.0000	50,000.00000	50,000.00	06/30/2021	Bellotti, Kristen	Active

Add/Edit Comments

Save Notify Refresh Add Update/Display

This will return you to the Main Requisition page:

**Maintain Requisitions**

**Requisition**

Business URIPS Requires State Approval: ☐ Resubmit Status Open  
 Unit  
 Requisition NEXT  
 ID  
 Requisition Name Budget Status Not Chk'd

Copy From Return: ☐ ☒ Hold From Further Processing

\*Requester kristenbellotti Bellotti, Kristen  
 \*Requisition Date 03/20/2019 Requisition Info  
 Origin SC Subcontract Requisition  
 \*Currency Code USD Dollar  
 Accounting Date 03/20/2019

Requisition Defaults Add Comments  
 Requisition Activities

Amount Summary  
 Total Amount 75,000.00 USD

Add Items From  
 Purchasing Kit Catalog  
 Item Search Requester Items

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Subcontract <\$25K	1.0000	TOT	447A	25,000.0000	25,000.00	Open
2	Subcontract >\$25K	1.0000	TOT	446A	50,000.0000	50,000.00	Open

View Printable Version \*Go to ...More...

Save Notify **Click Save to save the SC Requisition.** Add

## You will receive this message:

### 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.

OK

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)

### Requisition

Business URIPS      Requires State Approval: ☐      Resubmit      Status Open

Unit      Requisition ID 0000152232      Requisition Name 0000152232      Budget Status Not Chk'd

Return: ☐      ☒ Hold From Further Processing

**Header** ?

\*Requester kristenbellotti      Bellotti, Kristen  
\*Requisition Date 03/20/2019      Requester Info  
Origin SC      Subcontract Requisition  
\*Currency Code USD      Dollar  
Accounting Date 03/20/2019

[Requisition Defaults](#)      [Add Comments](#)      **Amount Summary** ?

[Requisition Activities](#)      [Document Status](#)      Total Amount 75,000.00 USD

**Add Items From** ?      **Select Lines To Display** ?

Purchasing Kit      Catalog      Search for Lines  
Item Search      Requester Items      Line      To      Retrieve

**Line** ?      Personalize | Find | View All | First 1.2 of 2 Last

Details	Ship To/Due Date	Status	Supplier Information	Item Information	Attributes	Contract	Sourcing Controls
Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Subcontract <\$25K	1.0000	TOT	447A	25,000.0000	25,000.00	Open
2	Subcontract >\$25K	1.0000	TOT	446A	50,000.0000	50,000.00	Open

[View Printable Version](#)      \*Go to ...More...

Save      Return to Search      Notify      Refresh      Add

➤ 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:

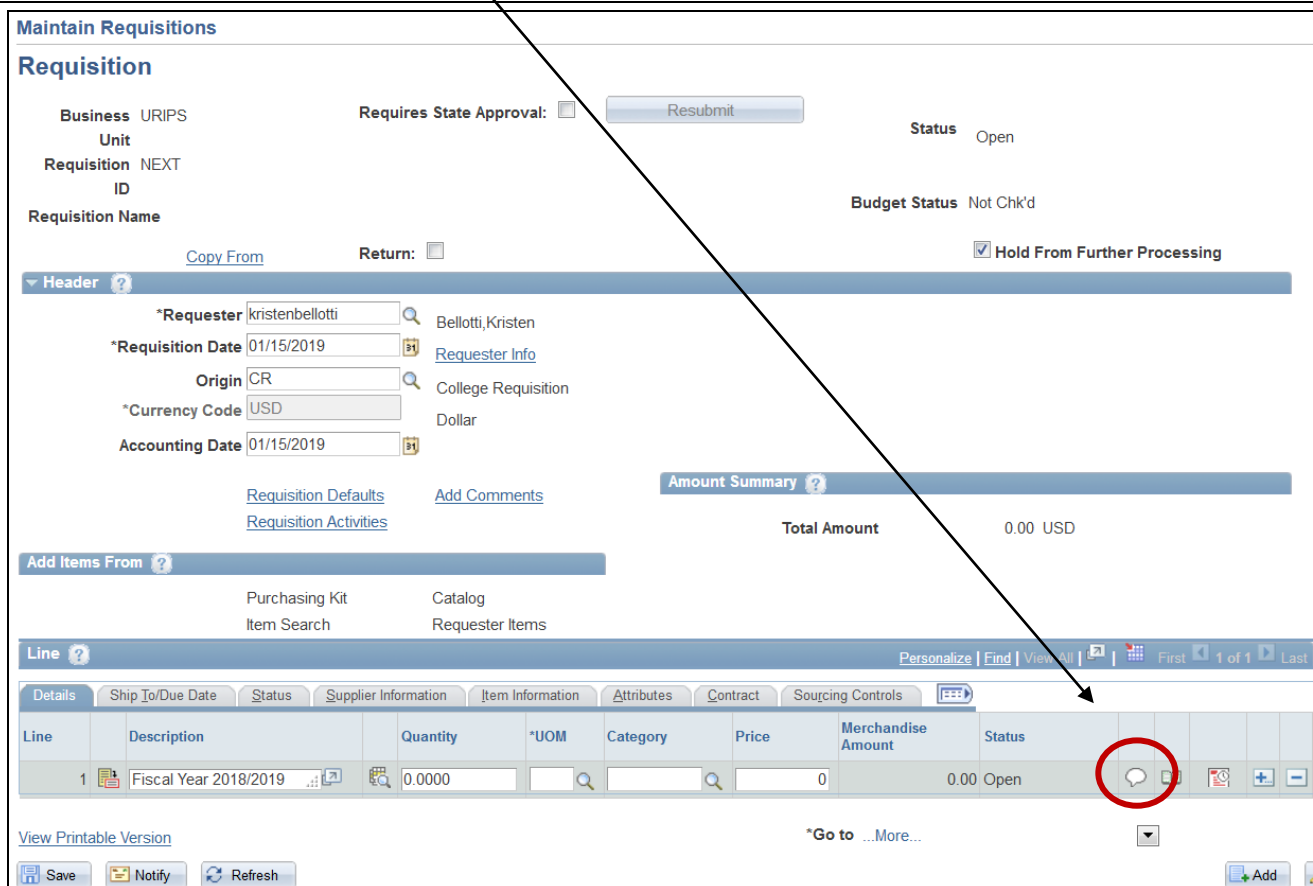
447A = account 5447; and

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.



Maintain Requisitions

**Requisition**

Business URIPS  
Unit  
Requisition NEXT  
ID  
Requisition Name

Requires State Approval: ☐ Resubmit

Status Open

Budget Status Not Chk'd

Copy From Return: ☐ ☒ Hold From Further Processing

Header ?

\*Requester kristenbellotti Bellotti, Kristen  
\*Requisition Date 01/15/2019 Requisition Info  
Origin CR College Requisition  
\*Currency Code USD Dollar  
Accounting Date 01/15/2019

Requisition Defaults Add Comments  
Requisition Activities

Amount Summary ?

Total Amount 0.00 USD

Add Items From ?

Purchasing Kit Catalog  
Item Search Requester Items

Line ?

Personalize Find View All First 1 of 1 Last

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Fiscal Year 2018/2019	0.0000			0	0.00	Open

View Printable Version

\*Go to ...More...

Save Notify Refresh Add



**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  when done.

**Line Comments**

Business Unit URIPS Requisition Date 01/14/2019  
 Requisition ID NEXT Status Open Line 1

\*Sort Method Comment Time Stamp \*Sort Sequence Ascending

**Comments** Find | View All First 1 of 1 Last  
[Use Standard Comments](#) Comment Status Active    
[Use Item Specifications](#)

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

☒ Send to Supplier ☐ Show at Receipt  
☐ Show at Voucher

**Associated Document**  
 Attachment    ☐ Email

From -> REQ URIPS-NEXT

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:

**Maintain Requisitions**

**Requisition**

Business Unit URIPS Requires State Approval: ☐  Status Open  
 Requisition ID NEXT  
 Requisition Name Budget Status Not Chk'd

[Copy From](#) Return: ☐ ☒ Hold From Further Processing

**Header** ?


\*Requester kristenbellotti Bellotti, Kristen  
 \*Requisition Date 01/15/2019 [Requester Info](#)  
 Origin CR College Requisition  
 \*Currency Code USD Dollar  
 Accounting Date 01/15/2019

[Requisition Defaults](#) [Add Comments](#) **Amount Summary** ?  
[Requisition Activities](#) Total Amount 0.00 USD

**Add Items From** ?

Purchasing Kit Catalog  
 Item Search Requester Items

**Line** ? Personalize | Find | View All | 1 of 1 Last

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status	
1	Fiscal Year 2018/2019	0.0000		406A	0	0.00	Open	

[View Printable Version](#) \*Go to ...More...

## ➤ Adding Header Comments

To add a Header Comment, Click on the hyperlink [Add Comments](#) :

**Requisition**

Business URIPS      Requires State Approval: ☐      Resubmit      Status Open  
Unit      Requisition 0000152232      ID      Budget Status Not Chk'd  
Requisition Name 0000152232      Return: ☐      ☒ Hold From Further Processing

**Header** ?

\*Requester kristenbellotti      Bellotti, Kristen  
\*Requisition Date 03/20/2019      Requester Info  
Origin SC      Subcontract Requisition  
\*Currency Code USD      Dollar  
Accounting Date 03/20/2019

[Requisition Defaults](#)      [Add Comments](#)      [Requisition Activities](#)      [Document Status](#)

**Amount Summary** ?

Total Amount 75,000.00 USD

**Add Items From** ?      **Select Lines To Display** ?

Purchasing Kit      Catalog  
Item Search      Requester Items

Search for Lines  
Line  To  Retrieve

**Line** ?      Personalize | Find | View All | First 1-2 of 2 Last

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Subcontract <\$25K	1.0000	TOT	447A	25,000.0000	25,000.00	Open
2	Subcontract >\$25K	1.0000	TOT	446A	50,000.0000	50,000.00	Open

View Printable Version      \*Go to ...More...

Save      Return to Search      Notify      Refresh      Add

**Header Comments**

Business Unit URIPS Requisition Date 03/20/2019  
 Requisition ID 0000152232 Status Open

☒ Retrieve Active Comments Only

\*Sort Method Comment Time Stamp \*Sort Sequence Ascending

**Comments** Find View All First 1 of 1 Last  
 Use Standard Comments Comment Status Active Inactivate +

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.

☒ Send to Supplier ☐ Show at Receipt  
☐ Show at Voucher

**Associated Document**

Attachment	Attach	View	Delete	Email
From -> REQ URIPS-0000152232				

Check the ☒ Send to Supplier box

To View All Comments, Click [View All](#)

To add additional Header Comments, Click +

If an "OFFSITE" Ship To Location was chosen, enter the entire Ship To Address in the Header Comment field as follows:

**Comments** Find View All First 2 of 2  
 Use Standard Comments Comment Status Active Inactivate

URI Dining Services  
 c/o The Ryan Center  
 One Lincoln Almond Plaza  
 Kingston, RI 02881

☒ Send to Supplier ☐ Show at Receipt  
☐ Show at Voucher

**Associated Document**

Attachment	Attach	View	Delete	Email
From -> REQ URIPS-0000152230				

## ➤ Adding Attachments

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

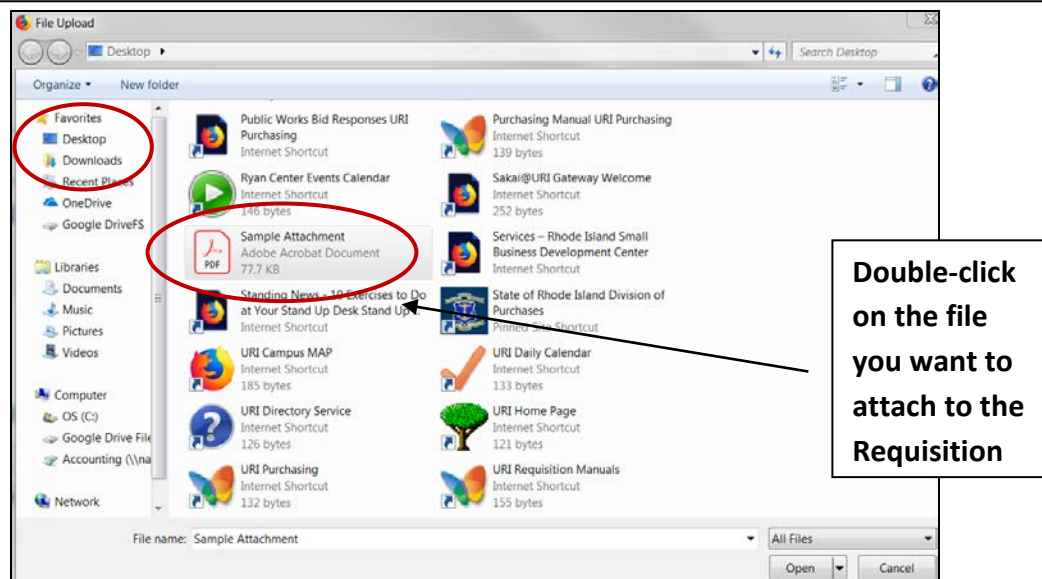
The screenshot shows the 'Header Comments' window. At the top, it displays 'Business Unit URIPS' and 'Requisition ID 0000152232'. To the right, it shows 'Requisition Date 03/20/2019' and 'Status Open'. Below this, there is a 'Retrieve' button and a checkbox for 'Retrieve Active Comments Only'. Further down, there are dropdown menus for '\*Sort Method' (set to 'Comment Time Stamp') and '\*Sort Sequence' (set to 'Ascending'), along with a 'Sort' button. The 'Comments' section shows a list with one entry: 'Agreement for Subcontract'. To the right of this entry is a 'Comment Status' set to 'Active' and an 'Inactivate' button. Below the comments, there are checkboxes for 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher'. The 'Associated Document' section at the bottom has a table with one row labeled 'Attachment'. In this row, the 'Attach' button is circled in red. Other buttons in this section include 'View', 'Delete', and 'Email'. At the very bottom, there are 'OK', 'Cancel', and 'Refresh' buttons.

This message will appear:

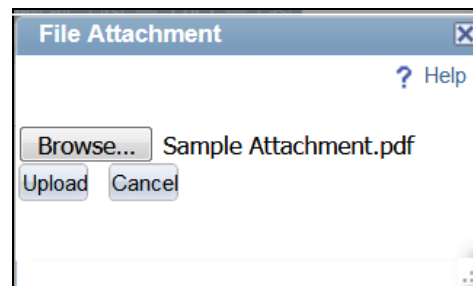
The screenshot shows a 'File Attachment' dialog box. It has a title bar with a close button and a 'Help' link. Inside the dialog, there is a 'Browse...' button, followed by the text 'No file selected.'. Below this, there are 'Upload' and 'Cancel' buttons.

Click **Browse...**

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



The name of the file will pop up in a 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.

**Header Comments**

Business Unit URIPS Requisition Date 03/20/2019  
 Requisition ID 0000152232 Status Open

☒ Retrieve Active Comments Only

\*Sort Method Comment Time Stamp \*Sort Sequence Ascending

**Comments** Find | **View All** | First 2 of 2 Last

[Use Standard Comments](#) Comment Status Active

Agreement for Subcontract

☐ Send to Supplier ☐ Show at Receipt  
☐ Show at Voucher

**Associated Document**


**Attachment** Sample\_Attachment.pdf    ☐ **Email**

From -> REQ URIPS-0000152232

To view the Attachment, Click . The Attachment will pop up in a new window. After checking for accuracy, close the new window to return to the Requisition.

**Comments** Find | **View All** | First 2 of 2 Last

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.

**Header Comments**

Business Unit URIPS      Requisition Date 03/04/2019  
Requisition ID 0000152230      Status Open

☒ Retrieve Active Comments Only        
\*Sort Method Comment Time Stamp      \*Sort Sequence Ascending     

**Comments**      Find | View 1      First 1-3 of 3      Last

[Use Standard Comments](#)      Comment Status Active       


Period of Performance: 10/31/19 – 10/30/20

☒ Send to Supplier      ☐ Show at Receipt  
☐ Show at Voucher

**Associated Document**

Attachment                        ☒ Email

From -> REQ URIPS-0000152230

[Use Standard Comments](#)      Comment Status Active       


Subrecipient Monitoring Form attached

☒ Send to Supplier      ☐ Show at Receipt  
☐ Show at Voucher

**Associated Document**

Attachment                        ☒ Email

From -> REQ URIPS-0000152230

[Use Standard Comments](#)      Comment Status Active       

Budget & Budget Justification attached

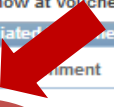
☒ Send to Supplier      ☐ Show at Receipt  
☐ Show at Voucher

**Associated Document**

Attachment                        ☒ Email

From -> REQ URIPS-0000152230

 Click  when done.

This will bring you back to the main Requisition screen:

**Requisition**

Business URIPS      Requires State Approval: ☐      Resubmit      Status Open

Unit      Requisition ID 0000152232      Budget Status Not Chk'd

Requisition Name 0000152232      Return: ☐      ☒ Hold From Further Processing

**Header** ?

\*Requester kristenbellotti      Bellotti, Kristen  
 \*Requisition Date 03/20/2019      Requester Info  
 Origin SC      Subcontract Requisition  
 \*Currency Code USD      Dollar  
 Accounting Date 03/20/2019

[Requisition Defaults](#)      [Add Comments](#)      **Amount Summary** ?

[Requisition Activities](#)      [Document Status](#)      Total Amount 75,000.00 USD

**Add Items From** ?      **Select Lines To Display** ?

Purchasing Kit      Catalog      Search for Lines  
 Item Search      Requester Items      Line  To  Retrieve

**Line** ?      Personalize | Find | View All | First 1-2 of 2 Last

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Subcontract <\$25K	1.0000	TOT	447A	25,000.0000	25,000.00	Open
2	Subcontract >\$25K	1.0000	TOT	446A	50,000.0000	50,000.00	Open

[View Printable Version](#)      \*Go to ...More...

[Save](#)      [Return to Search](#)      [Notify](#)      [Refresh](#)      [Add](#)

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

This message will appear:

**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.

OK

Click [OK](#)

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:

**Requisition**

Business URIPS  
Unit  
Requisition ID 0000152232  
Requisition Name 0000152232

Requires State Approval: ☐ Resubmit  
Status Open  
Budget Status Not Chk'd

Return: ☐ ☒ Hold From Further Processing

**Header**

\*Requester kristenbellotti Bellotti, Kristen  
\*Requisition Date 03/20/2019 Requester Info  
Origin SC Subcontract Requisition  
\*Currency Code USD Dollar  
Accounting Date 03/20/2019

[Requisition Defaults](#) [Add Comments](#)  
[Requisition Activities](#)  
[Document Status](#)

**Amount Summary**

Total Amount 75,000.00 USD

**Add Items From** **Select Lines To Display**

Purchasing Kit Catalog  
Item Search Requester Items

Search for Lines  
Line To Retrieve

**Line**

Personalize Find View All First 1-2 of 2 Last

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Subcontract <\$25K	1.0000	TOT	447A	25,000.0000	25,000.00	Open
2	Subcontract >\$25K	1.0000	TOT	446A	50,000.0000	50,000.00	Open

[View Printable Version](#) \*Go to ...More...

Save Return to Search Notify Refresh Add

This message may appear:

Click [Yes](#)

### Message

Do you wish to save the current document? (10250,274)

Document cannot be printed if it is not saved. If you choose Yes, document will be saved and printed. If you choose No, document cannot be printed.

[Yes](#)

[No](#)

The following message will appear:

Click [OK](#)

### 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.

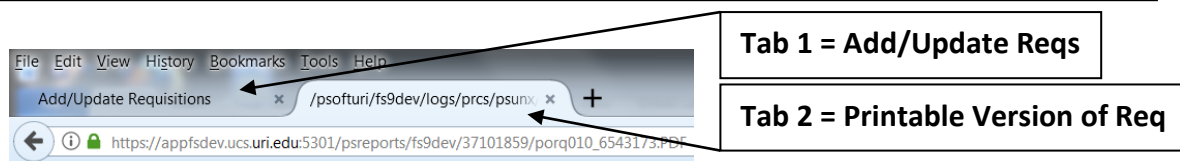
[OK](#)

➤ 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.



### Subcontract Requisition

This Form is for Internal Use Only

Suggested Vendor Name: University of California  
 Vendor Address: The Regents of the Univ of Ca, San Francisco  
 San Francisco, CA 94143-1241  
 Vendor#: 000006784

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

Business Unit:	URIPS	APPROVED
Date	Page	Req ID:
10/12/2018	1	0000146006
Requester	E-mail for Receiving Report	
Reina, Karen L	kheina@uri.edu	
Requester Dept.	Phone #	Fax #
N/A	401/277-5259	401/277-5154

Attachments: Y

Line-Schd	Description	Quantity	UOM	Price	Extended Amt	Due Date
1-1	Subcontract < \$25K for L. Rodriguez-Barraquer of the University of California San Francisco to work on Core B of Flavivirus Infections grant. Dates 8/13/2018-7/31/2019.	1.0000	TOT	25,000.0000	25,000.00	07/31/2019
2-1	Subcontract > \$25K for L. Rodriguez-Barraquer of the University of California San Francisco to work on Core B of Flavivirus Infections grant. Dates 8/13/2018-7/31/2019.	1.0000	TOT	105,933.0000	105,933.00	07/31/2019

Scope of Work attached

Subrecipient Monitoring Form attached

Budget attached

Budget Justification attached

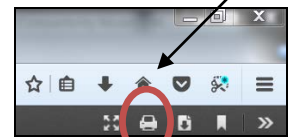
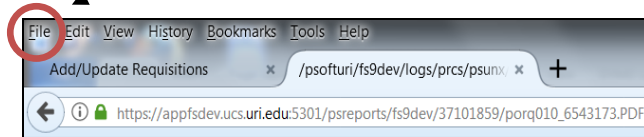
**Total Requisition Amount:** 130,933.00

Period	Line-Sch-Dist	Accounts	Project	Activity	Amount	FAB
FY2020	1-1-1	5447-500-2014-0000	0007489	RESEARCH	25,000.00	
FY2020	2-1-1	5446-500-2014-0000	0007489	RESEARCH	105,933.00	

[Refer to the Sample SC Requisitions starting on Page 57](#) to see examples of different Reqs from various departments.

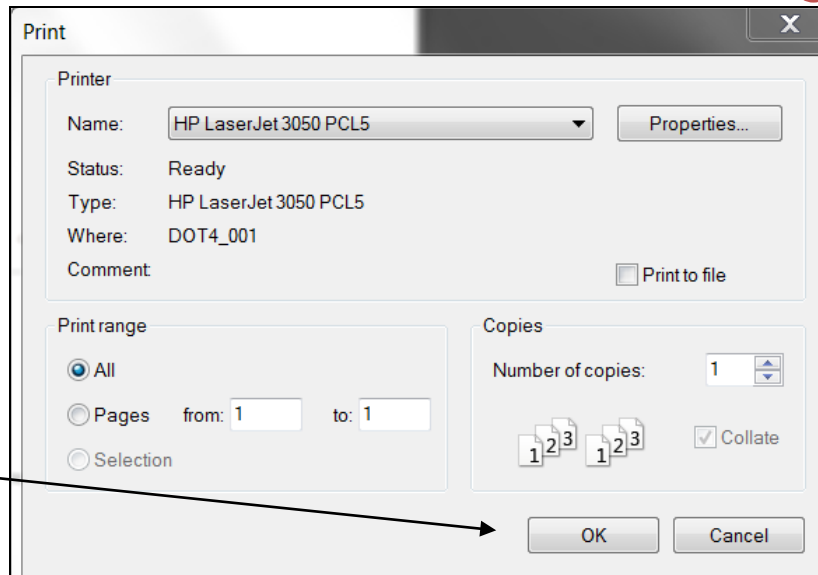
For purchasing use only						
Buyer	Date	Type/Code	SR#		Clerk	Date
Buyer	Date	Type/Code	PO#	Rev.#	Clerk	Date

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.

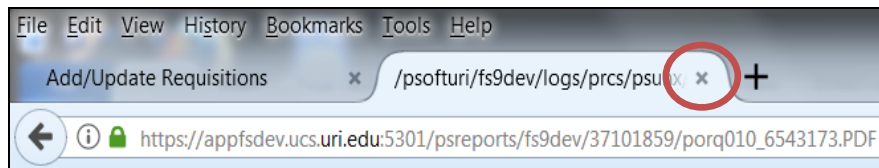


The Print box window comes up; choose where to Print your Requisition and Click

OK




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



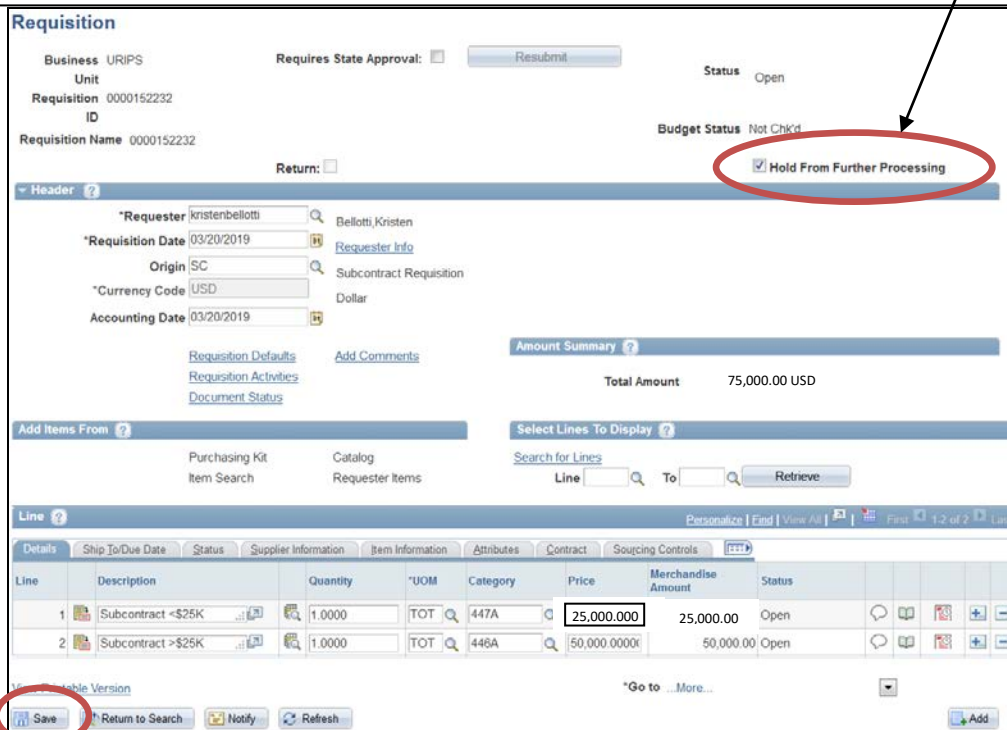
On the following pages, you will find instructions on how to proceed for both:

- [Originator \(Page 44\)](#); or
- [Requester \(Page 45\)](#)

## ➤ ORIGINATOR Procedures:

When the requisition is Complete and if you are an “Originator”, uncheck the box and click  Save :

☐ Hold From Further Processing



**Requisition**

Business: URIPS  
Unit: 0000152232  
Requisition ID: 0000152232  
Requisition Name: 0000152232

Requires State Approval: ☐ Resubmit

Status: Open

Budget Status: Not Chkd

☒ Hold From Further Processing

Return: ☐

**Header**

\*Requester: kristenbellotti Bellotti, Kristen  
\*Requisition Date: 03/20/2019  
Origin: SC Subcontract Requisition  
\*Currency Code: USD Dollar  
Accounting Date: 03/20/2019

[Requester Info](#)  
[Request Defaults](#)  
[Request Activities](#)  
[Document Status](#)  
[Add Comments](#)

**Amount Summary**

Total Amount: 75,000.00 USD

**Add Items From**

Purchasing Kit  
Item Search  
Catalog  
Requester Items

**Select Lines To Display**

Search for Lines  
Line: To: Retrieve

**Line**

Line	Description	Quantity	UOM	Category	Price	Merchandise Amount	Status
1	Subcontract <\$25K	1.0000	TOT	447A	25,000.000	25,000.00	Open
2	Subcontract >\$25K	1.0000	TOT	448A	50,000.00000	50,000.00	Open

**Save** **Return to Search** **Notify** **Refresh**

**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:

**Requisition**

Business URIPS      Requires State Approval: ☐      Resubmit      Status Open

Unit      Requisition 0000152232      Budget Status Not Chk'd

ID      Requisition Name 0000152232      ☒ **Hold From Further Processing**

Return: ☐

**Header**

\*Requester kristenbellotti      Bellotti, Kristen

\*Requisition Date 03/20/2019      Requisition Info

Origin SC      Subcontract Requisition

\*Currency Code USD      Dollar

Accounting Date 03/20/2019

[Requisition Defaults](#)      [Add Comments](#)      **Amount Summary**

[Requisition Activities](#)      [Document Status](#)      Total Amount 75,000.00 USD

**Add Items From**      **Select Lines To Display**

Purchasing Kit      Catalog      Search for Lines

Item Search      Requester Items      Line      To      Retrieve

**Line**      Personalize      Find      View All      First      1 of 2      Last

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Subcontract <\$25K	1.0000	TOT	447A	25,000.0000	25,000.00	Open
2	Subcontract >\$25K	1.0000	TOT	446A	50,000.0000	50,000.00	Open



[View Printable Version](#)      \*Go to ...More...

[Save](#)      [Return to Search](#)      [Notify](#)      [Refresh](#)      [Add](#)

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

**Maintain Requisitions**

**Requisition**

Business URIPS      Requires State Approval: ☐      Resubmit      Status Open  

Unit      Requisition 0000145713      Budget Status Not Chk'd

ID      Requisition Name 0000145713      ☐ **Hold From Further Processing**

Return: ☐

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: 0000000094 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):

The screenshot shows the 'Requisitions' search page. Annotations include:

- Click on the tab**: Points to the 'Find an Existing Value' tab.
- Enter the Requisition Number in the Requisition ID field**: Points to the 'Requisition ID begins with' input field.
- Click**: Points to the 'Search' button at the bottom.

The interface includes the following fields and options:

- Business Unit**: Dropdown menu with 'URIPS' selected.
- Requisition ID**: 'begins with' dropdown and input field.
- Requisition Status**: Dropdown menu.
- Requisition Date**: Input field with a calendar icon.
- Origin**: 'begins with' dropdown and input field.
- Requester**: 'begins with' dropdown and input field.
- Requester Name**: 'begins with' dropdown and input field.
- Hold From Further Processing**: Checkbox.
- State Req Flag**: Checkbox.
- State Req Reference**: 'begins with' dropdown and input field.
- State Requisition Date**: Input field with a calendar icon.
- Case Sensitive**: Checkbox.
- Buttons**: 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

When you retrieve the Requisition you will notice that the **Budget Status: = [Error](#)** and the Requisition has automatically been placed back on hold.

Click on the [Error](#) hyperlink to determine the cause of the budget error:

**Maintain Requisitions**

**Requisition**

Business: URIPS  
Unit: 0000145713  
Requisition ID: 0000145713  
Requisition Name: 0000145713

Requires State Approval: ☐ Resubmit

Status: [Approved](#)  
**Budget Status: [Error](#)**  
Budget Status: Not Chk'd

Return: ☐ Hold From Further Processing

**Header**

\*Requester: kristenbellotti Bellotti, Kristen  
\*Requisition Date: 12/31/2018 [Requester Info](#)  
Origin: CR College Requisition  
\*Currency Code: USD Dollar  
Accounting Date: 12/31/2018

[Requisition Defaults](#) [Edit Comments](#)

[Requisition Activities](#)  
[Document Status](#)

**Amount Summary**

Total Amount 3,500.00 USD

**Add Items From**

Purchasing Kit Catalog  
Item Search Requester Items

**Select Lines To Display**

[Search for Lines](#)  
Line  To  Retrieve

**Line**

Personalize | Find | View All | First | 1 of 1 | Last

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Convection Steamer	1.0000	EA	654A	3,500.0000	3,500.00	Pending

[View Printable Version](#) \*Go to ...More...

Save Return to Search Notify Refresh Add



In this particular example, the Budget Error Exception is the result of “Budge 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.

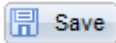
The screenshot shows the 'Line Exceptions' tab for Requisition ID 0000000094. The 'Exception Type' is set to 'Error'. Below the search filters, the 'Budgets with Exceptions' table is displayed. The table has columns for Business Unit, Ledger Group, Exception, More Detail, Override Budget, and Transfer. Four entries are listed, all with the exception 'Budget Date out of Bounds'. A red circle highlights the 'Exception' column, and an arrow points from the text above to this circle.

	Business Unit	Ledger Group	Exception	More Detail	Override Budget	Transfer
1	URIPS	GRT	Budget Date out of Bounds	More Detail	<input type="checkbox"/>	Go To ...
2	URIPS	GRT	Budget Date out of Bounds	More Detail	<input type="checkbox"/>	Go To ...
3	URIPS	GRT_DTL	Budget Date out of Bounds	More Detail	<input type="checkbox"/>	Go To ...
4	URIPS	GRT_DTL	Budget Date out of Bounds	More Detail	<input type="checkbox"/>	Go To ...

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 ☐ Hold From Further Processing box; and
- Click .
- In this example, the Requisition will not require Re-Approval and will invoke the Budget Process again.

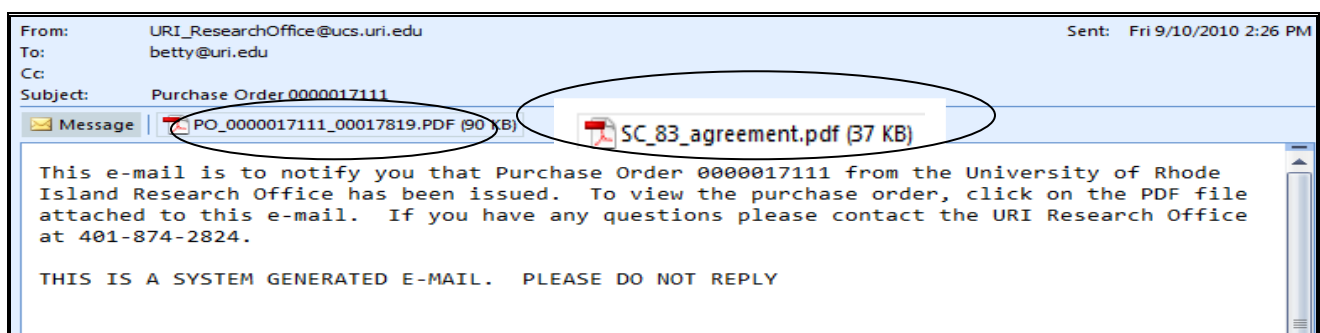
**If there are changes to the distributions**, i.e.: change the Chartfield String or change the Price, the Workflow Approval Process will start again once the Requisition is taken off Hold, Submitted For Approval and Saved.

**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.

**Subcontract Purchase Order**

THE UNIVERSITY OF RHODE ISLAND

**Supplier:** 0000000973  
Brown University  
The Education Alliance  
222 Richmond St. Ste 300  
Providence RI 02903-4226

**Buyer:** Cicelli, Franca  
**Requester:** Lane, Megan

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

**Ship To:** University of Rhode Island  
Psychology Department  
142 Flagg Rd., 314 Chafee Hall  
Kingston RI 02881

**Date Ordered:** 07/23/2019  
**Revision:** 1  
**P.O.#:** 0000154808  
**Ship Via:** Ship Via

**Payment Terms:** Net 30  
**Freight Terms:** FOB DESTINATION

**Phone:** 401/874-2824  
**Phone:** 401/874-9056  
**Requester Email:** megan\_lane@uri.edu

**Due Date:** 12/30/2019

Line-Sch	Item/Description	Quantity	UOM	PO Price	Extended Amt	Due Date
1-1	Subcontract to Brown University <\$25k (Subject to F&A)	1.00	TOT	25,000.00	25,000.00	12/30/2019
2-1	Subcontract to Brown University >\$25k (not subject to F&A)	1.00	TOT	19,700.00	19,700.00	12/30/2019

**Agreement**  
Period of Performance: 12/31/2018 - 12/30/2019

**Amount** 44,700.00

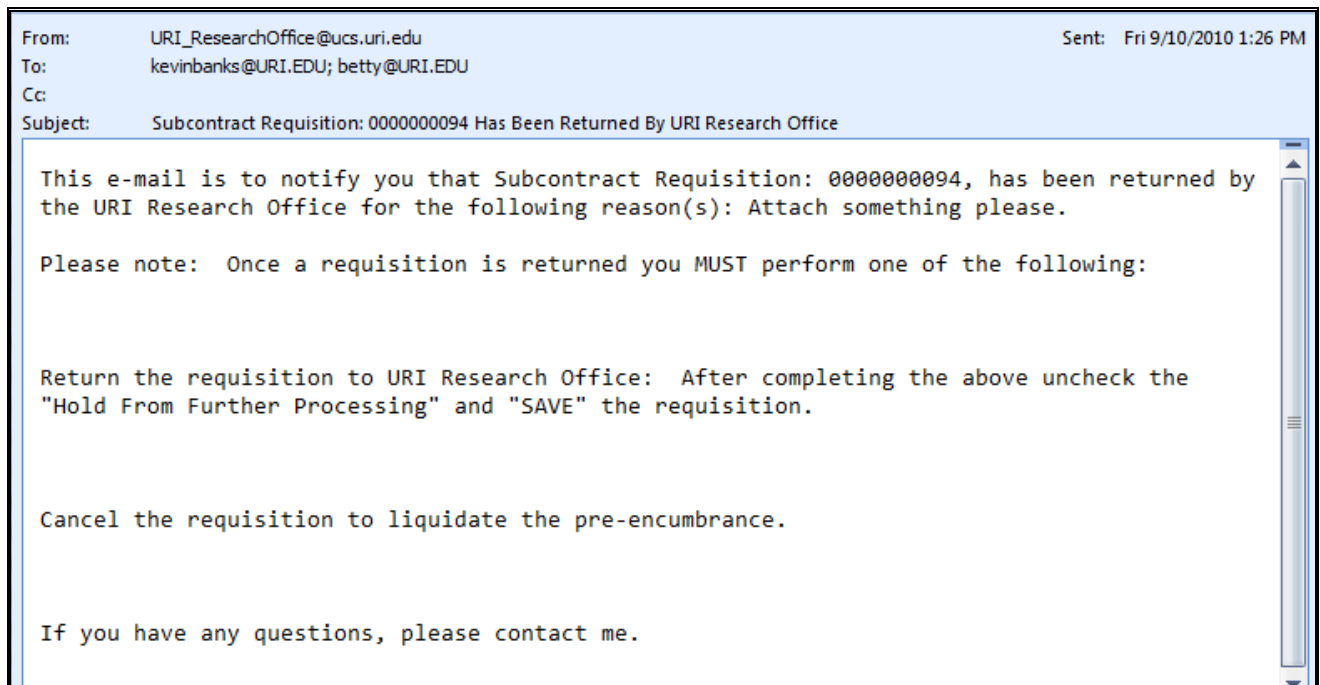
CERTIFICATE  
I HEREBY CERTIFY THAT THE ITEMS LISTED ABOVE HAVE BEEN  
RECEIVED IN GOOD CONDITION AND ARE ACCOUNTED FOR BY THE  
APPROPRIATE DEPARTMENT. I AM DAILY AUTHORIZED TO SIGN THIS CERTIFICATE.

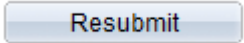
☒ URI Authorized Individual \_\_\_\_\_ Date \_\_\_\_\_  
Buyer \_\_\_\_\_

**Refer to the Sample SC Purchase Orders  
starting on Page 66 to see examples of  
different POs from various departments.**

## ➤ Returned Subcontract Requisition

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 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 .

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
2. Click
3. Uncheck ☒ Hold From Further Processing

☐ Status: Open ☒

Budget Status: Not Chk'd

☐ Hold From Further Processing

4. Click on ☒  Status: Open ☒

5. The Status will change from Open to Pending

6. Click

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:

**Maintain Requisitions**

**Requisition**

Business Unit: URIPS    Return to Requester: ☐    Requires State Approval: ☐    **Status: Denied** ✓  
Requisition ID: 0000019881    Budget Status: Not Checked ✗  
Requisition Name: 0000019881    ☐ Hold From Further Processing

**Header**

\*Requester: bettyg Gil, Betty    [Requisition Defaults](#)  
Requisition Date: 01/25/2012    [Requester Info](#)  
Origin: CR College Requisition    [Edit Comments](#)  
\*Currency Code: USD Dollar    [Requisition Activities](#)  
Accounting Date: 01/25/2012    [Document Status](#)

**Amount Summary**

Total Amount: 5,265.00 USD

**Select Lines To Display**

Line:  To:

**Line**

Line	Description	Quantity	*UOM	Category	Price	Amount	Status
1	Convention Steamer	1.0000	EA	654A	5,265.00000	5,265.00	Pending

[View Printable Version](#)    \*Go to:

## Example of Returned Requisition:

Maintain Requisitions

### Requisition

Business Unit: URIPS  
 Requisition ID: 0000070803  
 Requisition Name: 0000070803  
 Track Batch: 4

Requires State Approval: ☐ Resubmit Status: Approved  
 Budget Status: Valid

Return: ☒ SeqNum: 10 Please attach detailed specifications. Thank you, Betty

Notify ☒ Hold from Further Processing

**Header**

\*Requester: kgennari Gennari, Kathyrm  
 \*Requisition Date: 01/12/2015  
 Origin: CR College Requisition  
 \*Currency Code: USD Dollar  
 Accounting Date: 01/12/2015

[Requisition Defaults](#)  
[Edit Comments](#)  
[Requisition Activities](#)  
[Document Status](#)

**Amount Summary**

Total Amount: 12,000.00 USD  
 Pre-Encumbrance Balance: 12,000.00 USD

**Add Items From**

Purchasing Kit Catalog  
 Item Search Requester Items

**Select Lines To Display**

Line: To: Retrieve


Line	Description	Quantity	*UOM	Category	Price	Amount	Status
1	TEST	2.0000	EA	323A	6,000.0000	12,000.00	Approved

[View Printable Version](#)

\*Go to: ...More...

Save Return to Search Notify Refresh Add

If the Hold From Further Processing box is checked, you must uncheck the box before cancelling the requisition.

To cancel a Requisition click on the .

## This message will appear:

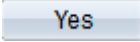
**Message**

Canceling a requisition will commit any changes made and prevent further changes. Continue? (10100,7)

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.

Yes No

Click 

## ➤ 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 Ca, San Francisco  
 San Francisco, CA 94143-1241  
 Vendor#: 0000006784

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

Business Unit:	URIPS	APPROVED
Date	Page	Req ID:
10/12/2018	1	0000146006
Requester	E-mail for Receiving Report	
Heine, Karen L	kheine@uri.edu	
Requester Dept.	Phone #	Fax #
N/A	401/277-5259	401/277-5154

Attachments: Y

Line-Schd	Description	Quantity	UOM	Price	Extended Amt	Due Date
1-1	Subcontract < \$25K for I. Rodriguez-Barraquer of the University of California San Francisco to work on Core B of Flavivirus Infections grant. Dates 8/13/2018-7/31/2019.	1.0000	TOT	25,000.0000	25,000.00	07/31/2019
2-1	Subcontract > \$25K for I. Rodriguez-Barraquer of the University of California San Francisco to work on Core B of Flavivirus Infections grant. Dates 8/13/2018-7/31/2019.	1.0000	TOT	105,933.0000	105,933.00	07/31/2019

Scope of Work attached

Subrecipient Monitoring Form attached

Budget attached

Budget Justification attached

**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.**

Total Requisition Amount: 130,933.00

Period	Line-Sch-Dist	Accounts	Project	Activity	Amount	FAB
FY2020	1-1-1	5447-500-2014-0000	0007489	RESEARCH	25,000.00	
FY2020	2-1-1	5446-500-2014-0000	0007489	RESEARCH	105,933.00	

For purchasing use only

Buyer	Date	Type/Code	SR#	Clerk	Date
Buyer	Date	Type/Code	PO#	Rev.#	Clerk
					Date

## Sample #2:

### 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  
 Psychology Department  
 142 Flagg Rd., 314 Chafee Hall  
 Kingston, RI 02881

Business Unit:	URIPS	APPROVED
Date	Page	Req ID:
05/29/2019	1	0000157438
Requester	E-mail for Receiving Report	
Lane, Megan	megan_lane@uri.edu	
Requester Dept.	Phone #	Fax #
IRI Administration	401/874-9055	401/874-5562

Attachments: Y

Line-Schd	Description	Quantity	UOM	Price	Extended Amt	Due Date
1-1	Subcontract to Brown University <\$25k (Subject to F&A)	1.0000	TOT	25,000.0000	25,000.00	12/30/2019
2-1	Subcontract to Brown University >\$25k (not subject to F&A)	1.0000	TOT	19,700.0000	19,700.00	12/30/2019

Award No. AWD07268

Budget Year 1

Budget Justification

Scope of Work

**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.**

Period	Line-Sch-Dist	Accounts	Project	Activity	Amount	FAB
FY2020	1-1-1	5447-500-2120-0000	0007944	RESEARCH	25,000.00	
FY2020	2-1-1	5446-500-2120-0000	0007944	RESEARCH	19,700.00	

For purchasing use only

Buyer	Date	Type/Code	SR#	Clerk	Date
Buyer	Date	Type/Code	PO#	Rev.#	Clerk
					Date

**Sample #3:****Subcontract Requisition**  
This Form is for Internal Use Only

Suggested Vendor Name: Board of Regents of the  
Vendor Address: University of Oklahoma  
Norman, OK 73019  
Vendor#: 0000059549

**Ship To:** University of Rhode Island  
Electrical, Computer & Biomedical Engineering  
51 Lower College Rd, RM 125, Pastore Hall  
Kingston, RI 02881  
**Attention:** Walt Besio

Business Unit:	URIPS	APPROVED
Date	Page	Req ID:
07/11/2019	1	0000159992
Requester	E-mail for Receiving Report	
Girard, Sheryl	sheryl.girard@uri.edu	
Requester Dept.	Phone #	Fax #
Dean Engineering	401/874-5987	401/782-1066

Attachments: N

Line-Schd	Description	Quantity	UOM	Price	Extended Amt	Due Date
1-1	Subcontract Agreement between University of Rhode Island and University of Oklahoma >\$25K (Not subject to F&A) Time Frame: 8/1/19-7/31/20	1.0000	TOT	400,356.5200	400,356.52	07/31/2020

Replaces PO#99521 which was closed because the supplier number changed. This represents a no cost extension of the original award through 7/31/20.

Total Requisition Amount: 400,356.52

Period	Line-Sch-Dist	Accounts	Project	Activity	Amount	FAB
FY2021	1-1-1	5446-500-2303-0000	0006734	RESEARCH	400,356.52	

**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.

For purchasing use only

For purchasing use only						
Buyer	Date	Type/Code	SR#		Clerk	Date
Buyer	Date	Type/Code	PO#	Rev.#	Clerk	Date

## Sample #4:

### Subcontract Requisition

This Form is for Internal Use Only

Suggested Vendor Name: Healthcentric Advisors  
 Vendor Address: 235 Promenade Street, Ste 500  
 Providence, RI 02908  
 Vendor#: 0000048972

**Ship To:** University of Rhode Island  
 CHS - Gerontology  
 55 Lower College Rd, Quinn Hall, Rm 100  
 Kingston, RI 02881

Business Unit:	URIPS	APPROVED
Date	Page	Req ID:
07/16/2019	1	0000160185
Requester	E-mail for Receiving Report	
Sands, Faith D	flee@uri.edu	
Requester Dept.	Phone #	Fax #
Gerontology	401/874-5332	401/874-9322

Attachments: Y

Line-Schd	Description	Quantity	UOM	Price	Extended Amt	Due Date
-----------	-------------	----------	-----	-------	--------------	----------

1-1	Subcontract < \$25,000 with Healthcentric Advisors from 7/1/19 through 6/30/20. See attached paperwork.	1.0000	TOT	13,660.0000	13,660.00	06/30/2020
-----	---------------------------------------------------------------------------------------------------------	--------	-----	-------------	-----------	------------

Subcontract < \$25,000 with Healthcentric Advisors from 7/1/19 through 6/30/20. See attached paperwork.

Total Requisition Amount: 13,660.00

Period	Line-Sch-Dist	Accounts	Project	Activity	Amount	FAB
FY2020	1-1-1	5447-500-2407-0000	0007755	RESEARCH	13,660.00	

**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.**

For purchasing use only

Buyer	Date	Type/Code	SR#	Clerk	Date
Buyer	Date	Type/Code	PO#	Rev.#	Clerk
					Date

## 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#: 0000005532

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

Business Unit:	URIPS	APPROVED
Date	Page	Req ID:
07/11/2019	1	0000159977
Requester	E-mail for Receiving Report	
Bellavia, Laura	lbellavia@uri.edu	
Requester Dept.	Phone #	Fax #
Biomedical & Pharm. Scienc	01/874-9382	

Attachments: Y

Line-Schd	Description	Quantity	UOM	Price	Extended Amt	Due Date
-----------	-------------	----------	-----	-------	--------------	----------

1-1	Subcontracts <\$25k	1.0000	TOT	18,372.0000	18,372.00	04/30/2020
-----	---------------------	--------	-----	-------------	-----------	------------

Subaward with Rhode Island College for the services of Kymberlee O'Brien.  
 Begin Date: 5/01/2019 End Date: 4/30/2020

There is no carryover of unobligated funds.  
 All goods and services must be received by April 30, 2020

Total Requisition Amount: 18,372.00

Period	Line-Sch-Dist	Accounts	Project	Activity	Amount	FAB
FY2020	1-1-1	5447-500-2606-0000	0007891	RESEARCH	18,372.00	

**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.**

For purchasing use only

Buyer	Date	Type/Code	SR#	Clerk	Date
Buyer	Date	Type/Code	PO#	Rev.#	Clerk
					Date

## Sample #6:

### Subcontract Requisition

This Form is for Internal Use Only

Suggested Vendor Name: Brown University  
 Vendor Address: The Education Alliance  
 Providence, RI 02903-4226  
 Vendor#: 000000973

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

Business Unit:	URIPS	COMPLETE
Date	Page	Req ID:
03/14/2019	1	0000152983
Requester	E-mail for Receiving Report	
Hodson, Terri-Lyn	thodson@uri.edu	
Requester Dept.	Phone #	Fax #
IIHI Administration	401/874-2205	401/874-5562

Attachments: Y

Line-Schd	Description	Quantity	UOM	Price	Extended Amt	Due Date
-----------	-------------	----------	-----	-------	--------------	----------

1-1	Advice of Change to subaward 112012_0003452 in the amount of \$44,994 for the period of performance 6/1/18 - 5/31/19.	1.0000 TOT	44,994.0000	44,994.00	05/31/2019
-----	-----------------------------------------------------------------------------------------------------------------------	------------	-------------	-----------	------------

Budget

Budget justification

Scope of Work

Letter of Intent

Current P.O. Amount: \$358,955  
 This Change: \$44,994  
 New PO Amount: \$403,899

**IN THIS AOC REQUISITION EXAMPLE –  
 Funds are being adding to the PO:**

**Line 1 describes the change**

**Header comments describe the  
 attachments as well as showing the  
 increase to the PO.**

Total Requisition Amount: 44,994.00

Period	Line-Sch-Dist	Accounts	Project	Activity	Amount	FAB
FY2019	1-1-1	5446-500-2117-0000	0005749	RESEARCH	44,994.00	

For purchasing use only

Buyer	Date	Type/Code	SR#	Clerk	Date
Buyer	Date	Type/Code	PO#	Rev.#	Clerk
					Date

## 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#: 000000973

Business Unit:	URIPS	APPROVED
Date	Page	Req ID:
07/18/2019	1	0000160336
Requester	E-mail for Receiving Report	
Clements, Sharon R	sclements@uri.edu	
Requester Dept.	Phone #	Fax #
GSO Grant Management Support	401/874-6177	401/874-6728

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

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

Line-Schd	Description	Quantity	UOM	Price	Extended Amt	Due Date
1-1	Advice of change to PO # 138648 to decrease in the amount of \$22.73	1.0000	TOT	1.0000	1.00	08/31/2019

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 #: 863-7292

Sub recipient PI:  
 NAME: Benjamin Knorlein  
 ADDRESS: Box 1929, Providence, RI 02912  
 EMAIL: benjamin\_knorlein@brown.edu

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

**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.**

Total Requisition Amount: 1.00

Period	Line-Sch-Dist	Accounts	Project	Activity	Amount	FAB
FY2020	1-1-1	5447-500-2802-0000	0007240	RESEARCH	1.00	

For purchasing use only

Buyer	Date	Type/Code	SR#	Clerk	Date
Buyer	Date	Type/Code	PO#	Rev.#	Clerk
					Date



## 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  
 Beaupre Ctr, 140 Flagg Road, RM 470  
 Kingston, RI 02881

Business Unit:	URIPS	APPROVED
Date	Page	Req ID:
07/11/2019	1	0000160018
Requester	E-mail for Receiving Report	
Greywolf, Terry G	ryan_inst@etal.uri.edu	
Requester Dept.	Phone #	Fax #
Ryan Institute Neuroscienc	14018745008	

Attachments: Y

Line-Schd	Description	Quantity	UOM	Price	Extended Amt	Due Date
1-1	Advice of Change to reduce old CFS 500 2606 0000 0007253 on PO 134157 \$8,394.67 to zero and move funds to new CFS 500 2606 0000 0007955	1.0000	TOT	1.0000	1.00	06/30/2019
2-1	Advice of Change to increase new CFS 500 2606 0000 0007955 on PO 134157 \$8,394.67 to move carryover from old CFS.	1.0000	TOT	8,394.6700	8,394.67	06/30/2020
3-1	Advice of Change to increase new CFS 500 2606 0000 0007955 on PO 134157 \$69,930.00 for year 3 funding	1.0000	TOT	69,930.0000	69,930.00	06/30/2020
4-1	Advice of Change to extend the end date of PO 134157 to 06/30/20	1.0000	TOT	1.0000	1.00	06/30/2020

Carryover of \$8,394.67 from year 2 plus addition of year 3 funding of \$69,930 brings total obligated \$212,915 through June 30, 2020

Year 3 budget and budget justification includes carryover funds

Sub statement of work

Subrecipient monitoring form

Total Requisition Amount

**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.**

Period	Line-Sch-Dist	Accounts	Project	Activity	Amount	Enc
FY2019	1-1-1	5446-500-2606-0000	0007253	RESEARCH	1.00	
FY2020	2-1-1	5446-500-2606-0000	0007955	RESEARCH	8,394.67	
FY2020	3-1-1	5446-500-2606-0000	0007955	RESEARCH	69,930.00	
FY2020	4-1-1	5446-500-2606-0000	0007955	RESEARCH	1.00	

For purchasing use only

Buyer	Date	Type/Code	SR#	Clerk	Date
Buyer	Date	Type/Code	PO#	Rev.#	Clerk
					Date

Subcontract Purchase Order

THE  
UNIVERSITY  
OF RHODE ISLAND

Page 1 of 2

Date Ordered	Revision	P.O.#
07/23/2019		0000154808
Payment Terms	Freight Terms	Ship Via
Net 30	FOB DESTINATION	BEST WAY
Buyer	Phone	Due Date
Cirelli, Franca	401/874-2824	12/30/2019
Requester	Phone	Requester Email
Lane, Megan	401/874-9055	megan_lane@uri.edu

Supplier: 0000000973  
Brown University  
The Education Alliance  
222 Richmond St Ste 300  
Providence RI 02903-4226

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

Ship To: University of Rhode Island  
Psychology Department  
142 Flagg Rd., 314 Chafee Hall  
Kingston RI 02881

Tax Exempt? Y Tax Exempt ID: 189

Line-Sch	Item/Description	Quantity	UOM	PO Price	Extended Amt	Due Date
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1-1	Subcontract to Brown University <\$25k (Subject to F&A)	1.00	TOT	25,000.00	25,000.00	12/30/2019
2-1	Subcontract to Brown University >\$25k (not subject to F&A)	1.00	TOT	19,700.00	19,700.00	12/30/2019

Agreement

Period of Performance: 12/31/2018 - 12/30/2019

Amount

44,700.00

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.

CERTIFICATE  
I HEREBY CERTIFY THAT THE ITEMS LISTED ABOVE HAVE BEEN  
RECEIVED IN GOOD CONDITION AND ARE ACCEPTED BY ME. THIS IS A  
JUST AND PROPER CHARGE AGAINST THE ACCOUNTS LISTED AND HAS NOT  
BEEN PAID BEFORE. I AM DULY AUTHORIZED TO SIGN THIS CERTIFICATE.

X  
URI Authorized Individual

Date

*Lane*

Buyer

Subcontract Purchase Order

Page 2 of 2

THE  
UNIVERSITY  
OF RHODE ISLAND

Date Ordered 07/23/2019	Revision	P.O.# 0000154808
Payment Terms Net 30	Freight Terms FOB DESTINATION	Ship Via BEST WAY
Buyer Cirelli, Franca	Phone 401/874-2824	Due Date 12/30/2019
Requester Lane, Megan	Phone 401/874-9055	Requester Email megan.lane@uri.edu

Supplier: 0000000973  
Brown University  
The Education Alliance  
222 Richmond St Ste 300  
Providence RI 02903-4226

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

Ship To: University of Rhode Island  
Psychology Department  
142 Flagg Rd., 314 Chafee Hall  
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 \$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, 50 Branch Avenue, Providence, RI, 02904 (401-222-2056).

Period Accounts		INTERNAL USE ONLY		Category		Requisition ID	PO Type	FAB
		Projects	Activity					
FY2020	5446-500-2120-0000	0007944	RESEARCH	446A	19,700.00	157438	Subcon	
FY2020	5447-500-2120-0000	0007944	RESEARCH	447A	25,000.00			

CERTIFICATE  
I HEREBY CERTIFY THAT THE ITEMS LISTED ABOVE HAVE BEEN  
RECEIVED IN GOOD CONDITION AND ARE ACCEPTED BY ME. THIS IS A  
JUST AND PROPER CHARGE AGAINST THE ACCOUNTS LISTED AND HAS NOT  
BEEN PAID BEFORE. I AM DULY AUTHORIZED TO SIGN THIS CERTIFICATE.

X  
URI Authorized Individual \_\_\_\_\_ Date \_\_\_\_\_

*Megan Lane*

Buyer

# Sample #10 – page 1 of 2:

THE  
UNIVERSITY  
OF RHODE ISLAND

## Purchase Order - Change Order

Page 1 of 2

Date Ordered	Revision	P.O.#
09/12/2016	4 - 04/02/2019	0000109962
Payment Terms	Freight Terms	Ship Via
Net 30	FOB DESTINATION	BEST WAY
Buyer	Phone	Due Date
Campanale, Eileen	401/874-5088	05/31/2019
Requester	Phone	Requester Email
Hodson, Terri-Lyn	401/874-2205	thodson@uri.edu

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 Flagg 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
1-1	Advice of change to subaward 112012. 0003452 in the amount of \$63,333 for the period of performance 6/1/16-5/31/16.	1.00	TOT	73,170.00	73,170.00	05/31/2019
2-1	Subcontract>\$25K	1.00	TOT	98,785.00	98,785.00	05/31/2019
3-1	Subcontract>\$25K	1.00	TOT	187,000.00	187,000.00	05/31/2019
4-1	Subcontract>\$25K	1.00	TOT	44,994.00	44,994.00	05/31/2019

Current P.O. Amount \$63,333  
This Change \$9,837  
New P.O. Amount \$73,170

Modification #9 - Advice of change to increase PO 44,994 for a new total of \$231,994 for the period 06/01/18 - 5/31/19

Agreement

IN THIS AOC 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.

CERTIFICATE  
I HEREBY CERTIFY THAT THE ITEMS LISTED ABOVE HAVE BEEN  
RECEIVED IN GOOD CONDITION AND ARE ACCEPTED BY ME. THIS IS A  
JUST AND PROPER CHARGE AGAINST THE ACCOUNTS LISTED AND HAS NOT  
BEEN PAID BEFORE. I AM DULY AUTHORIZED TO SIGN THIS CERTIFICATE.

X  
URI Authorized Individual

Date

*Eileen Campanale*  
Buyer

Purchase Order - Change Order

THE  
UNIVERSITY  
OF RHODE ISLAND

Page 2 of 2

Date Ordered	Revision	P.O.#
09/12/2016	4 - 04/02/2019	0000109962
Payment Terms	Freight Terms	Ship Via
Net 30	FOB DESTINATION	BEST WAY
Buyer	Phone	Due Date
Campanale, Eileen	401/874-5088	05/31/2019
Requester	Phone	Requester Email
Hodson, Terri-Lyn	401/874-2205	thodson@uri.edu

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 Flagg 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
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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 \$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, 50 Branch Avenue, Providence, RI, 02904 (401-222-2056).

Period	Accounts	INTERNAL USE ONLY		Category		Requisition ID	PO Type	FAB
		Projects	Activity					
FY2017	5446-500-2117-0000	0005749	RESEARCH	446A	260,170.00	152983	Subcon	
FY2018	5446-500-2117-0000	0005749	RESEARCH	446A	98,785.00			
FY2019	5446-500-2117-0000	0005749	RESEARCH	446A	44,994.00			

CERTIFICATE

I HEREBY CERTIFY THAT THE ITEMS LISTED ABOVE HAVE BEEN  
RECEIVED IN GOOD CONDITION AND ARE ACCEPTED BY ME. THIS IS A  
JUST AND PROPER CHARGE AGAINST THE ACCOUNTS LISTED AND HAS NOT  
BEEN PAID BEFORE. I AM DULY AUTHORIZED TO SIGN THIS CERTIFICATE.

X  
URI Authorized Individual

Date

  
Buyer

Subcontract Purchase Order

THE  
UNIVERSITY  
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Page 1 of 2

Date Ordered	Revision	P.O.#	0000138648
07/12/2018	1 - 05/03/2019		
Payment Terms	Freight Terms	Ship Via	
Net 30	FOB DESTINATION	BEST WAY	
Buyer	Phone	Due Date	
Campanale, Eileen	401/874-5088	08/31/2019	
Requester	Phone	Requester Email	
Clements, Sharon R	401/874-6177	sclements@uri.edu	

Supplier: 0000000973  
Brown University  
The Education Alliance  
222 Richmond St Ste 300  
Providence RI 02903-4226

Bill To: Accounting - aprec@etal.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 Receiving Rd.  
Narragansett RI 02882-1197

Tax Exempt? Y Tax Exempt ID: 189

Line-Sch	Item/Description	Quantity	UOM	PO Price	Extended Amt	Due Date
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1-1

Modification #1 - Advice of Change to extend the end date to 08/31/19

New Period of Performance: 05/01/18 - 08/31/19

Agreement

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,  
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, 50 Branch Avenue, Providence, RI, 02904 (401-222-2056).

CERTIFICATE

I HEREBY CERTIFY THAT THE ITEMS LISTED ABOVE HAVE BEEN  
RECEIVED IN GOOD CONDITION AND ARE ACCEPTED BY ME. THIS IS A  
JUST AND PROPER CHARGE AGAINST THE ACCOUNTS LISTED AND HAS NOT  
BEEN PAID BEFORE. I AM DULY AUTHORIZED TO SIGN THIS CERTIFICATE.

X  
URI Authorized Individual

Date

*Eileen Campanale*  
Buyer



Subcontract Purchase Order

THE  
UNIVERSITY  
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Page 2 of 2

Date Ordered	Revision	P.O.#
07/12/2018	1 - 05/03/2019	0000138648
Payment Terms	Freight Terms	Ship Via
Net 30	FOB DESTINATION	BEST WAY
Buyer	Phone	Due Date
Campanale, Eileen	401/874-5088	08/31/2019
Requester	Phone	Requester Email
Clements, Sharon R	401/874-6177	sclements@uri.edu

Supplier: 0000000973  
Brown University  
The Education Alliance  
222 Richmond St Ste 300  
Providence RI 02903-4226

Bill To: Accounting - aprec@etal.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 Receiving Rd.  
Narragansett RI 02882-1197

Tax Exempt? Y Tax Exempt ID: 189

Line-Sch	Item/Description	Quantity	UOM	PO Price	Extended Amt	Due Date
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		INTERNAL USE ONLY					
Period	Accounts	Projects	Activity	Category	Requisition ID	PO Type	FAB
FY2019	5447-500-2802-0000	0007240	RESEARCH	447A	6,760.17	154493	Subcon

CERTIFICATE

I HEREBY CERTIFY THAT THE ITEMS LISTED ABOVE HAVE BEEN  
RECEIVED IN GOOD CONDITION AND ARE ACCEPTED BY ME. THIS IS A  
JUST AND PROPER CHARGE AGAINST THE ACCOUNTS LISTED AND HAS NOT  
BEEN PAID BEFORE. I AM DULY AUTHORIZED TO SIGN THIS CERTIFICATE.

X  
URI Authorized Individual

Date

*Eileen Campanale*  
Buyer

Subcontract Purchase Order

THE  
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OF RHODE ISLAND

Page 1 of 2

Date Ordered	Revision	P.O.#
04/12/2018	1 - 10/02/2018	0000134157
Payment Terms	Freight Terms	Ship Via
Net 30	FOB DESTINATION	BEST WAY
Buyer	Phone	Due Date
Campanale, Eileen	401/874-5088	06/30/2019
Requester	Phone	Requester Email
Greywolf, Terry G	14018745008	ryan_inst@etal.uri.edu

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, Carlotti Admin. Bldg.  
75 Lower College Rd., Suite 1  
Kingston RI 02881  
(401) 874-7553

Ship To: Katharina Quinlan

Tax Exempt? Y Tax Exempt ID: 189

Line-Sch	Item/Description	Quantity	UOM	PO Price	Extended Amt	Due Date
1-1						
2-1						
3-1	Subcontract>\$25K	1.00	TOT	34,672.90	34,672.90	06/30/2019
4-1	Subcontract>\$25K	1.00	TOT	69,930.00	69,930.00	06/30/2019

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

Modification #1 - Advice of Change to increase PO \$69,930 for Year 2 finding and to extend the end date to 06/30/2019  
Prior PO Total - \$73,055  
Increase - \$69,930  
New PO Total - \$142,985

Subagreement

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.

CERTIFICATE  
I HEREBY CERTIFY THAT THE ITEMS LISTED ABOVE HAVE BEEN  
RECEIVED IN GOOD CONDITION AND ARE ACCEPTED BY ME. THIS IS A  
JUST AND PROPER CHARGE AGAINST THE ACCOUNTS LISTED AND HAS NOT  
BEEN PAID BEFORE. I AM DULY AUTHORIZED TO SIGN THIS CERTIFICATE.

X  
URI Authorized Individual

Date

*Eileen Campanale*  
Buyer



## Subcontract Purchase Order

THE  
UNIVERSITY  
OF RHODE ISLAND

Page 2 of 2

Date Ordered	Revision	P.O.#
04/12/2018	1 - 10/02/2018	0000134157
Payment Terms	Freight Terms	Ship Via
Net 30	FOB DESTINATION	BEST WAY
Buyer	Phone	Due Date
Campanale, Eileen	401/874-5088	06/30/2019
Requester	Phone	Requester Email
Greywolf, Terry G	14018745008	ryan_inst@etal.uri.edu

**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, Carlotti Admin. Bldg.  
75 Lower College Rd., Suite 1  
Kingston RI 02881  
(401) 874-7553

**Ship From:** Katharina Quinlan

Tax Exempt? Y Tax Exempt ID: 189

Line-Sch	Item/Description	Quantity	UOM	PO Price	Extended Amt	Due Date
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## 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 \$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, 50 Branch Avenue, Providence, RI, 02904 (401-222-2056).

		INTERNAL USE ONLY					
Period	Accounts	Projects	Activity	Category		Requisition ID	PO Type
FY2018	5446-500-2606-0000	0006739	RESEARCH	446A	13,382.10	143714	Subcon
FY2018	5447-500-2606-0000	0006739	RESEARCH	447A	25,000.00		
FY2019	5446-500-2606-0000	0007253	RESEARCH	446A	104,602.90		

## CERTIFICATE

I HEREBY CERTIFY THAT THE ITEMS LISTED ABOVE HAVE BEEN  
RECEIVED IN GOOD CONDITION AND ARE ACCEPTED BY ME. THIS IS A  
JUST AND PROPER CHARGE AGAINST THE ACCOUNTS LISTED AND HAS NOT  
BEEN PAID BEFORE. I AM DULY AUTHORIZED TO SIGN THIS CERTIFICATE.

X  
URI Authorized Individual

Date

*Eileen Campanale*  
Buyer