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

June 2021
Sponsored Programs (SPA)

1) **NEW** - SPA will no longer wait for a PO# to be obtained to submit fully executed documents to a subrecipient. The agreement will be sent to the subrecipient “To Be Determined (TBD)” in the PO# field.

2) When SPA has a fully executed subrecipient agreement, it will be sent to the subrecipient, the requestor and the PI (NOT SSAS).

3) After administrators receive a fully executed agreement, a requisition for a purchase order can be submitted in Quantum. (Instructions follow)
Strategic Sourcing and Acquisition Services (SSAS)

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

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

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

EXAMPLE: Time Period Start = 8/01/2020
Time Period End = 7/31/21
UMB PI= Jane Smith
Subrecipient PI = Joe Smith
Subaward Request # 1234
PO# = LEAVE BLANK
Federal ID# = xxxxxxxxxxxx
ADDRESS = 123 Main St. Anywhere, USA
2) Attach the fully executed agreement to the requisition. NOTE - a requisition without a signed agreement will be returned.

3) The DESCRIPTION LINE on the requisition must include the Subaward Request#

   Example: Subaward Award # 1234 – Univ. of Colorado

4) NOTE to BUYER = Signed agreement/amendment attached

4) Strategic Sourcing will process the requisition into a PO

5) A completed purchase order notification will be sent to the requestor via Quantum

6) **NEW** Department/requestor notifies the subrecipient vendor and SPA of the purchase order no.
Strategic Sourcing and Acquisition Services (SSAS)

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

**AFTER** an Amendment/Modification has been signed by SPA

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

How to **Extend the Period of Performance** to a Purchase Order
(No additional funds)

**AFTER** an amendment/modification has been signed by SPA

1) Requestor sends an email to Strategic Sourcing [subrecipient_po@umaryland.edu](mailto:subrecipient_po@umaryland.edu)
2) Attach the fully executed *(signed)* amendment to the email
3) Strategic Sourcing will process the change order
4) A completed change order notification will be sent to the Requestor via Quantum
Strategic Sourcing and Acquisition Services (SSAS)

Sub Agreements That Already Have a Purchase Order Number

1) Email the fully executed agreement to subrecipient_po@umaryland.edu

2) Amendments/modifications (change orders to add funds) submit a requisition in Quantum

3) Change orders only extending period of performance - email a fully executed amendment/modification to subrecipient_po@umaryland.edu