

# Office of Grants and Contracts:

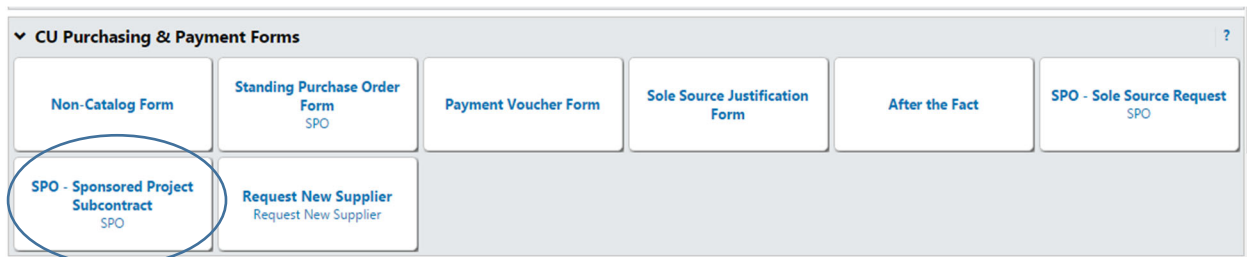
## Creating a SPO in Marketplace for Subcontracts

Purpose: The purpose of this guide is to explain how to create a Standing Purchase Order for subcontracts in the CU Marketplace system, address common issues related to this procedure, and provide context for the procedure within the overall subcontracts process.

**For guidance on marketplace submissions tied to *Research Service* or *Practice Participation Agreements* (RSA/PPA)- see the separate guidance at the end of this document.**

Context: A requisition for a SPO can be created at any point in the subcontracts process, provided that it is created by the time the subcontract is ready for CU execute. Once the subcontract is ready to execute, a SPO must be created and the requisition # provided to the subcontracts specialist in OGC in order to move forward with final signatures.

**Step 1:** When it is time to create a SPO, first locate the CU Forms section of the CU Marketplace homepage and select *SPO-Sponsored Project Subcontract (SPO)* form.



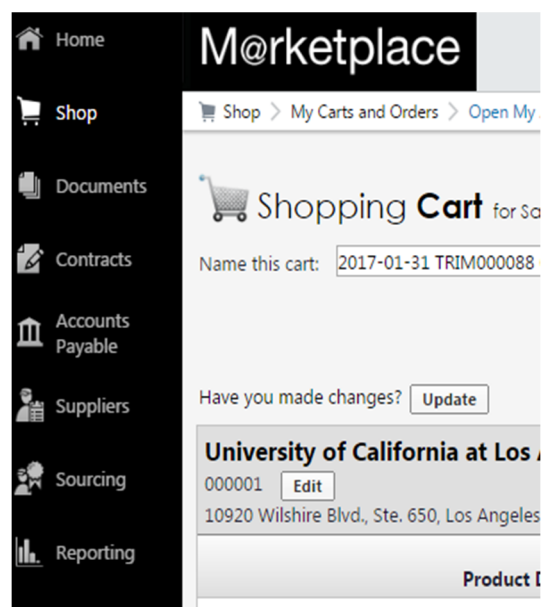
**Step 2:** In the Standing order details section, enter the supplier or click the supplier search link. Validate that the supplier and order Fulfillment Address selected are accurate. An order fulfillment address is the address to which the SPO will be issued.

You can change the fulfillment address, by clicking on the blue text that reads [select a different fulfillment center](#). [See screenshot on the next page]

Please note that if the supplier does not exist you will need to request a new supplier.

Click on Suppliers -> Requests -> Request New Supplier

Fill out the form [select *New Supplier Request* from the dropdown], including full contact information and the vendors W-9 if you have it. PSC will contact and set-up the vendor in the system and send a notification to the designated email identified in the form.



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## Creating a SPO in Marketplace for Subcontracts

**Step 3:** Enter the required information in the SPO Description section. \*\*Please note this step will differ based on whether the subcontract is greater than or less than \$25,000.

### Step 3(a) (Subcontract less than \$25,000):

- Enter the SPO description
- Enter the SPO encumbrance
- Select Commodity Code 17**
- Enter the Begin Date of the SPO
- Enter the end date for the SPO current budget period. The end date must mirror the end date listed in the subcontract.
- In the available actions section, select *Add and go to Cart* and then click the **Go** button in the upper right hand corner of the form.

tract Available Actions: Add and go to Cart Go C

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**Standing Order Request Instructions** ?

Use this form to request a Sponsored Project Subcontract Standing Purchase Order (SPO).

The amount entered in the field titled "Standing Order Amount" will be the encumbrances in the financial system for the current period of the subcontract. If the subcontract SPO will be encumbered over multiple years, the total amount over the life of the subcontract should be entered in the field titled "Subcontract Grand Total".

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**Instructions** ?

**Supplier** Board of Trustees of Michigan State Uni [more info...](#)  
[select different supplier](#)

**Fulfillment Address** Location 34:  
426 Auditorium Road Room 2  
East Lansing, MI 48824 US  
[select different fulfillment center](#)

**Distribution**  
The system will distribute purchase orders using the method(s) indicated below:  
Email (HTML Body) gatewood@msu.edu

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**Standing Order Details** ?

Please provide a brief description (100 characters or less) of this blanket order request.

SPO Description	Unit Price	SPO Encumbrance
Sarche - TRC II Subcontract Michigan State University 201 characters remaining <a href="#">expand</a>   <a href="#">clear</a>	1.00	21,015

**Commodity Code** 17 - Subcontracts / Sponsored Pr... ▼

**Standing Order Term**

**Begin Date** 09/30/2016   
mm/dd/yyyy

**End Date** 09/29/2017   
mm/dd/yyyy

**Additional SPO Details**

Subcontract Grand Total (Multi-Year Only)

Standing Order PO # being replaced

Total

### Step 3(b) (Subcontract greater than \$25,000):

- Enter the SPO description

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### Creating a SPO in Marketplace for Subcontracts

- b. Enter the SPO encumbrance up to the first \$25,000. This amount will be encumbered on the financial reports line.
- c. **Select Commodity Code 17**
- d. Enter the Begin Date of the SPO
- e. Enter the end date for the SPO current budget period. The end date must mirror the end date listed in the subcontract.
- f. In the available actions section, select Add to Cart and **return**, and then click the **Go** button.
  - a. This allows for 2 lines to be set up so that F&A can be accurately allocated. The SPO will have to be re-created if you don't select *Add to Cart and Return* because two lines won't be created.

# Office of Grants and Contracts:

## Creating a SPO in Marketplace for Subcontracts

Secure | <https://solutions.sciquest.com/apps/Router/FavoritesFormEdit?FavoriteProductId=1872183&FavPageContext=2&tmstmp=1485895010606>

**SPO - Sponsored Project Subcontract** Available Actions: [Add to Cart and Return](#) [Go](#) [Close](#) [Print](#)

**Standing Order Request Instructions** ?

Use this form to request a Sponsored Project Subcontract Standing Purchase Order (SPO).

The amount entered in the field titled "Standing Order Amount" will be the encumbrances in the financial system for the current period of the subcontract. If the subcontract SPO will be encumbered over multiple years, the total amount over the life of the subcontract should be entered in the field titled "Subcontract Grand Total".

**Instructions** ?

**Supplier** University of California at Los Angeles [more info...](#)  
[select different supplier](#)

**Fulfillment Address** 000001: (preferred)  
10920 Wilshire Blvd.  
Ste. 650  
Los Angeles, CA 90024 US  
[select different fulfillment center](#)

**Supplier Phone** +1 (310) 794-3215

**Distribution**  
The system will distribute purchase orders using the method(s) indicated below:  
Email (HTML Body) [gdhillon@research.ucla.edu](mailto:gdhillon@research.ucla.edu)

**Standing Order Details** ?

Please provide a brief description (100 characters or less) of this blanket order request.

SPO Description	Unit Price	SPO Encumbrance
Year 1 Subcontract - R01	1.00	25,000

230 characters remaining [expand](#) | [clear](#)

**Commodity Code** 17 - Subcontracts / Sponsored Pr... ▼

**Standing Order Term**

**Begin Date** 09/01/2016 [mm/dd/yyyy](#)

**End Date** 08/31/2017 [mm/dd/yyyy](#)

**Additional SPO Details**

Subcontract Grand Total (Multi-Year Only)

Standing Order PO # being replaced

**STEP 4:** Complete the fields again – enter the balance of the Subcontract encumbrance amount in the SPO encumbrance field. If the subcontract is for \$80,000 in this budget period and F&A needs to be taken on the first \$25,000 –

# Office of Grants and Contracts:

## Creating a SPO in Marketplace for Subcontracts

After the fields are completed, select the action of *Add and go to Cart* under Available Actions.

Secure | <https://solutions.sciquest.com/apps/Router/FavoritesFormEdit?FavoriteProductId=1872183&FavPageContext=2&tmstmp=1485895034183>

**Form added to cart successfully**  
Each **Add to cart** action adds the item to the cart. Use the **Save** option to update the item in the cart.

**SPO - Sponsored Project Subcontract** Available Actions: Add and go to Cart Go Close

**Standing Order Request Instructions** ?

Use this form to request a Sponsored Project Subcontract Standing Purchase Order (SPO).

The amount entered in the field titled "Standing Order Amount" will be the encumbrances in the financial system for the current period of the subcontract. If the subcontract SPO will be encumbered over multiple years, the total amount over the life of the subcontract should be entered in the field titled "Subcontract Grand Total".

**Instructions** ?

**Supplier** University of California at Los Angeles [more info...](#)  
[select different supplier](#)

**Fulfillment Address** 000001: (preferred)  
10920 Wilshire Blvd.  
Ste. 650  
Los Angeles, CA 90024 US  
[select different fulfillment center](#)

**Supplier Phone** +1 (310) 794-3215

**Distribution**  
The system will distribute purchase orders using the method(s) indicated below:  
Email (HTML Body) [gdhillon@research.ucla.edu](mailto:gdhillon@research.ucla.edu)

**Standing Order Details** ?

Please provide a brief description (100 characters or less) of this blanket order request.

SPO Description	Unit Price	SPO Encumbrance
Year 1 Subcontract - R01	1.00	55,000

230 characters remaining [expand](#) | [clear](#)

**Commodity Code** 17 - Subcontracts / Sponsored Pr... ▼

**Standing Order Term**

**Begin Date** 09/01/2016   
mm/dd/yyyy

**End Date** 08/31/2017   
mm/dd/yyyy

**Additional SPO Details**

Subcontract Grand Total (Multi-Year Only)

Standing Order PO # being replaced

**Total** 0.00

Form is completed first with line 1 of SPO Encumbrance amount of \$25,000

Form is added to cart and returned for line 2 of the SPO Encumbrance amount equal to \$55,000

# Office of Grants and Contracts: Creating a SPO in Marketplace for Subcontracts

**Accounting Codes**

Business Unit: UCOLO  
Speedtype: 63013008  
Fund: no value  
Org: no value  
Program: no value  
Project\_code: no value  
Subclass: no value  
Account: 492600

Buttons: Recalculate and Save, Save, Cancel

**STEP 5:** In the shopping cart, enter a unique shopping cart Name (optional) and click the Update button.

**Shopping Cart** for Sarah Trimmer

Name this cart: Norris\_NIHR01/University of California

Buttons: Continue Shopping, Add Speedtype/Shipping/etc., Assign Cart

Have you made changes? Update

**University of California at Los Angeles**

000001 Edit  
10920 Wilshire Blvd., Ste. 650, Los Angeles, CA 90024 US

Product Description	Unit Price	Quantity	Total
<b>SPO - Sponsored Project Subcontract</b> open form...			25,000.00 USD
Begin Date: 9/1/2016 End Date: 8/31/2017			
Year 1 Subcontract - R01 Begin Date: 9/1/2016 End Date: 8/31/2017 Commodity Code: 17 - Subcontracts / Sponsored Pr...	1.00 USD	25,000	25,000.00 USD
<b>SPO - Sponsored Project Subcontract</b> open form...			55,000.00 USD
Begin Date: 9/1/2016 End Date: 8/31/2017			
Year 1 Subcontract - R01 Begin Date: 9/1/2016 End Date: 8/31/2017 Commodity Code: 17 - Subcontracts / Sponsored Pr...	1.00 USD	55,000	55,000.00 USD

Have you made changes? Update

80,000 Item(s) for a total of 80,000.00 USD  
subtotal: 80,000.00 USD  
estimated tax, shipping & handling: 0.00 USD

Buttons: Add Speedtype/Shipping/etc., Assign Cart

You can accept the default name or enter a unique name which can be used later to easily identify or search for your shopping cart.

# Office of Grants and Contracts:

## Creating a SPO in Marketplace for Subcontracts

The cart will show the 2 lines for the SPO – line 1 for the first \$25,000 and the 2nd line for the remaining balance.

The above screenshot in shopping cart-naming step is incorrect (previous page). Notice there isn't an Edit button next to the dollar amounts. The below shows a properly set-up cart screen shot that has two lines labeled 1. and 2. There is an edit button under each dollar amount.

University of California at Los Angeles [more info...](#)  
 000001  
 10920 Wilshire Blvd., Ste. 650, Los Angeles, CA 90024 US

For selected line items | Add to Favorites [Go](#)

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price																								
1 <b>SPO - Sponsored Project Subcontract</b> <a href="#">more info...</a> <b>SPO Description - Year 1 Subcontract - R01</b>			1.00	25,000	25,000.00 USD																								
<b>Accounting Codes</b> values have been overridden for this line <table border="1"> <thead> <tr> <th>Business Unit</th> <th>Speedtype</th> <th>Fund</th> <th>Org</th> <th>Program</th> <th>Project_code</th> <th>Subclass</th> <th>Account</th> </tr> </thead> <tbody> <tr> <td>UCOLO</td> <td>63013008</td> <td>30</td> <td>21435</td> <td>no value</td> <td>25A4620</td> <td>no value</td> <td>492600</td> </tr> <tr> <td>The University of Colorado</td> <td>NIH SE NTGNCS GNMCS T1D</td> <td>Sponsored Projects- Fed &amp; Priv</td> <td>CSPH-Epidemiology SpnsrdPgms/Gfts</td> <td></td> <td>NIH SE NTGNCS GNMCS T1D</td> <td></td> <td>Subcontract 0 - 1st \$25000</td> </tr> </tbody> </table> <a href="#">copy to other lines</a>						Business Unit	Speedtype	Fund	Org	Program	Project_code	Subclass	Account	UCOLO	63013008	30	21435	no value	25A4620	no value	492600	The University of Colorado	NIH SE NTGNCS GNMCS T1D	Sponsored Projects- Fed & Priv	CSPH-Epidemiology SpnsrdPgms/Gfts		NIH SE NTGNCS GNMCS T1D		Subcontract 0 - 1st \$25000
Business Unit	Speedtype	Fund	Org	Program	Project_code	Subclass	Account																						
UCOLO	63013008	30	21435	no value	25A4620	no value	492600																						
The University of Colorado	NIH SE NTGNCS GNMCS T1D	Sponsored Projects- Fed & Priv	CSPH-Epidemiology SpnsrdPgms/Gfts		NIH SE NTGNCS GNMCS T1D		Subcontract 0 - 1st \$25000																						
<b>SPO - Sponsored Project Subcontract</b> <a href="#">more info...</a> <b>SPO Description - Year 1 Subcontract - R01</b>																													
<b>Accounting Codes</b> values have been overridden for this line <table border="1"> <thead> <tr> <th>Business Unit</th> <th>Speedtype</th> <th>Fund</th> <th>Org</th> <th>Program</th> <th>Project_code</th> <th>Subclass</th> <th>Account</th> </tr> </thead> <tbody> <tr> <td>UCOLO</td> <td>63013008</td> <td>30</td> <td>21435</td> <td>no value</td> <td>25A4620</td> <td>no value</td> <td>492601</td> </tr> <tr> <td>The University of Colorado</td> <td>NIH SE NTGNCS GNMCS T1D</td> <td>Sponsored Projects- Fed &amp; Priv</td> <td>CSPH-Epidemiology SpnsrdPgms/Gfts</td> <td></td> <td>NIH SE NTGNCS GNMCS T1D</td> <td></td> <td>Subcontract 0 - &gt; \$25000</td> </tr> </tbody> </table> <a href="#">copy to other lines</a>						Business Unit	Speedtype	Fund	Org	Program	Project_code	Subclass	Account	UCOLO	63013008	30	21435	no value	25A4620	no value	492601	The University of Colorado	NIH SE NTGNCS GNMCS T1D	Sponsored Projects- Fed & Priv	CSPH-Epidemiology SpnsrdPgms/Gfts		NIH SE NTGNCS GNMCS T1D		Subcontract 0 - > \$25000
Business Unit	Speedtype	Fund	Org	Program	Project_code	Subclass	Account																						
UCOLO	63013008	30	21435	no value	25A4620	no value	492601																						
The University of Colorado	NIH SE NTGNCS GNMCS T1D	Sponsored Projects- Fed & Priv	CSPH-Epidemiology SpnsrdPgms/Gfts		NIH SE NTGNCS GNMCS T1D		Subcontract 0 - > \$25000																						
					<b>Supplier subtotal</b> 80,000.00 Shipping 0.00 Handling 0.00 <b>Supplier total</b> 80,000.00USD																								
Shipping and Handling charges are calculated and charged as appropriate by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.					<b>Subtotal</b> 80,000.00 Shipping 0.00 Handling 0.00 <b>Total</b> 80,000.00 USD																								

**STEP 6:** For line 1 select the Edit button and input the project ST and the account code for the first \$25k.

# Office of Grants and Contracts: Creating a SPO in Marketplace for Subcontracts

Select “edit” and then enter the speed type. Next enter the account code that is appropriate and will allow for F&A to be assessed on the expenses charged. (This account code should end in zero.)

Then scroll to the 2nd line and select the “edit” button and enter the speed type. For the account code, enter the account code that is appropriate to exempt F&A from being charged on the expenses in the account code. (This account code should end in 1.)

**Pro-tip:** run an operating summary in m-fin and use the account that matches the OGC set-up. (Note – the below is just an example and does not align with our \$80,000 example above.)

	552605 -- OTHR OPERATING CNTRCT SERVICES	900.00
	553000 -- CONFERENCE REGISTRATION FEES	0.00
	<b>OPERATING EXPENSES</b>	<b>189,103.00</b>
SUBCONTRACTS	492601 -- SUBCONTRACT 0 - > \$25000	79,013.00
	492620 -- SUBCONTRACT 2 - 1ST \$25000	12,703.57
	492621 -- SUBCONTRACT 2 - > \$25000	3,962.43
	<b>SUBCONTRACTS</b>	<b>95,679.00</b>
TRAVEL	700000 -- TRAVEL GENERAL BUDGET	3,240.00
	700200 -- EMPLOYEE TRAVEL - OUT-OF-STATE	0.00
	700300 -- EMPLOYEE TRAVEL -INTERNATIONAL	0.00

After both changes are made, the lines will be displayed as below. The split for these lines should be in the body not the header. The highlighted below is considered the header.



# Office of Grants and Contracts:

## Creating a SPO in Marketplace for Subcontracts

requisition | PR Approvals | PO Preview | Comments (4) | Attachments (4) | History

Summary | Shipping | Billing | **Accounting Codes** | Supplier Info | Shipping and Handling

Accounting Codes

These values apply to all lines unless specified by line item

Accounting Codes values vary by line

For selected line items: Add To Active Cart Go

**Commonwealth of Pennsylvania** [more info...](#)

Location 3  
Division of Newborn Screening and Genetics, Pennsylvania Department of Health, 625 Forster Street, Harrisburg, PA 17120 US

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 SPO - Sponsored Project Subcontract <a href="#">more info...</a>			1.00	25,000	25,000.00 USD
Accounting Codes					
values have been overridden for this line					
Business Unit	Speedtype	Fund	Org	Program	Project_code
UCOLO	63013115	30	21435	no value	25M4154
The University of Colorado	HRSA IMPRO TIMELINESS	Sponsored Projects- Fed & Priv	CSPH-Epidemiology SpnsrdPgms/Gfts		HRSA IMPRO TIMELINESS
					Subcontract 0 - 1st \$25000
<a href="#">copy to other lines</a>					
2 SPO - Sponsored Project Subcontract <a href="#">more info...</a>			1.00	25,000	25,000.00 USD
Accounting Codes					
values have been overridden for this line					
Business Unit	Speedtype	Fund	Org	Program	Project_code
UCOLO	63013115	30	21435	no value	25M4154
The University of Colorado	HRSA IMPRO TIMELINESS	Sponsored Projects- Fed & Priv	CSPH-Epidemiology SpnsrdPgms/Gfts		HRSA IMPRO TIMELINESS
					Subcontract 0 - > \$25000
<a href="#">copy to other lines</a>					
Supplier subtotal					50,000.00
Shipping					0.00

After all the changes are made, then select the “Submit Order” button.

General Shipping Billing **Accounting Codes** Internal Notes and Attachments External Notes and Attachments Final Review

Submit Order

Assign Cart

Go to Express Checkout Return to shopping cart Continue Shopping

You have completed the required information in this step. At this point, you can do the following:

Proceed to the next step: [Internal Notes and Attachments](#). Go straight to the end: [Final Review](#).

Requisition | PR Approvals | PO Preview | Comments | Attachments | History

Summary | Shipping | Billing | **Accounting Codes** | Supplier Info | Shipping and Handling

**STEP 7:** Now that you have your requisition set up, provide the requisition # to your subcontracts specialist along with a partially executed subcontract.

# Office of Grants and Contracts:

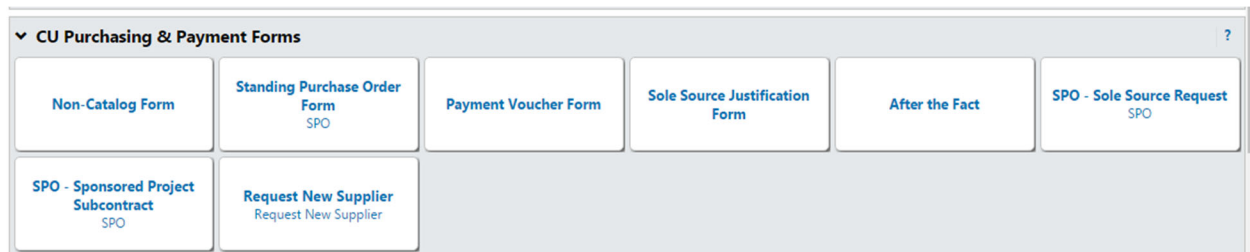
## Creating a SPO in Marketplace for Subcontracts

### **Research Services and Practice Participation Agreements Process**

Requisitions for RSA and PPA agreements cannot use the Sponsored Project Subcontract form since they are not an actual subaward or subcontract.

For these types of agreements, use the Non-Catalog Form (only option for purchases under 10K) or the Standing Purchase Order Form (purchase must exceed 10k).

Timing: Do NOT submit the requisition during the sub drafting process. Only submit the requisition after you've received the fully executed RSA or PPA back from our subs team. Unlike the procedures for the SPO- Sponsored Project Subcontract, you will not need to provide a requisition number when you return the draft for us to sign.



The screenshot displays a web interface for "CU Purchasing & Payment Forms". The menu is organized into two rows of buttons. The top row includes: "Non-Catalog Form", "Standing Purchase Order Form SPO", "Payment Voucher Form", "Sole Source Justification Form", "After the Fact", and "SPO - Sole Source Request SPO". The bottom row includes: "SPO - Sponsored Project Subcontract SPO" and "Request New Supplier Request New Supplier". A question mark icon is visible in the top right corner of the menu header.

CU Purchasing & Payment Forms					
Non-Catalog Form	Standing Purchase Order Form SPO	Payment Voucher Form	Sole Source Justification Form	After the Fact	SPO - Sole Source Request SPO
SPO - Sponsored Project Subcontract SPO	Request New Supplier Request New Supplier				