

Subcontracts Updates

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Requests during Jan-Feb 2019

- 50% of requests received during 2019 have included a Requisition number
- Curry: 100% of requests for new subs or amendments with requisitions.
- SEAS: 100% of requests for new subs with requisitions.
- SOM: 90% of requests for new subs with requisitions.

Outgoing Subcontracts Updates

- Hard Rollout April 1, 2019
 - New Agreements
 - Modifications to Subcontracts with multiple years of performance
- Grandfathering Projects on their last year of performance and No Cost Extensions

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Guidelines

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Subcontract Purchase Order Guidelines

- [▶ Creating a Requisition for a Subcontract](#)
- [▶ Requesting a Change to a Subcontract Purchase Order](#)

FAQ

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Subcontract Purchase Order FAQs

- ▶ [How do I request a PO for an Outgoing Subcontract?](#)
- ▶ [How do I select the correct Supplier?](#)
- ▶ [What if I can't find the correct Supplier?](#)
- ▶ [The system is giving the error that the expenditure type is not allowed.](#)
- ▶ [What amount should I enter into the requisition?](#)
- ▶ [How many Distribution Lines do I need to enter?](#)
- ▶ [Who is maintaining POs for Outgoing Subcontracts?](#)

Sub-Recipient Invoicing

- Transition
- Process Improvements

Sub-Recipient Invoicing Transition

Until sub-recipients have fully transitioned to POs sub-invoicing will operate under two different processes, receipting Purchase Orders or Issuing Payment Vouchers

- For sub-recipients using projects, the payment voucher process will remain the same
- For sub-recipients using POs, the fiscal contact will receipt invoices against the PO

Invoicing Processes

Payment Voucher

- Sub Recipient sends UVA invoices via osp-subcontractorinvoice@virginia.edu
- Analyst moves invoice from personal inbox to Invoice Data File folder "Invoices to be processed"
- Post Award reviews invoice for compliance purposes
- Post award logs invoice to invoice tracker
- Post award saves invoice to shared folder
- Post Award stamps invoice with PI Certification stamp
- Post Award emails invoice to PI and Fiscal Contact using standard invoice email language
- Post award saves all correspondence related to invoice in data file
- PI reviews invoice and if approved will sign certification stamp
- Fiscal Contact issues payment voucher to sub recipient by entering invoice details and manually selecting Vendor and expenditure types

PO Process

- Sub Recipient sends UVA invoices via osp-subcontractorinvoice@virginia.edu
- All invoices are delivered to new sub-invoice mailbox
- Post award reviews invoice for compliance purposes
- Post award attaches invoice to PO, enters required invoice data in PO, and applies expenses to correct expenditure type (Subcontract, F&A for first \$25K or Subcontract, no F&A after first \$25K is spent)
- Post Award emails invoice to PI and Fiscal Contact using newly proposed invoice email language (Paraphrasing proposed language: by paying this invoice the PI has provided approval, pending Internal Audit approval)
- PI and Fiscal Contact reviews invoice and if approved Fiscal Contact will receipt invoice against the PO. Supplier and expenditure types are preselected when PO is created

Improvement Highlights

Moving to the PO process has allowed for several efficiencies and the addition of several internal controls

- Elimination of several procedural steps, such as the use of tracking spreadsheets and manually archiving invoices multiple times.
- Supplier (known as Vendor in payment vouchers) is preselected in PO, no longer requiring manually selection at time of payment thus reducing risk of paying incorrect recipient
- Expenditure types are preselected in PO, no longer requiring manually selection at time of payment thus reducing the risk of incorrect F&A application
- Oracle PO module will not allow for a PO to be overpaid
- Less monthly reconciliation of projects

Contacts

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