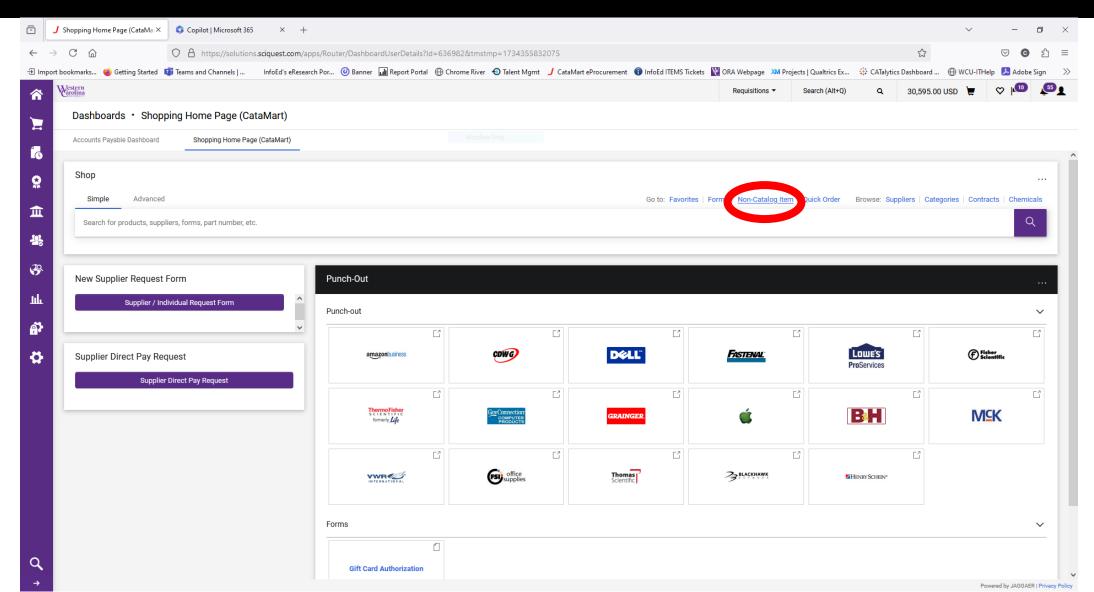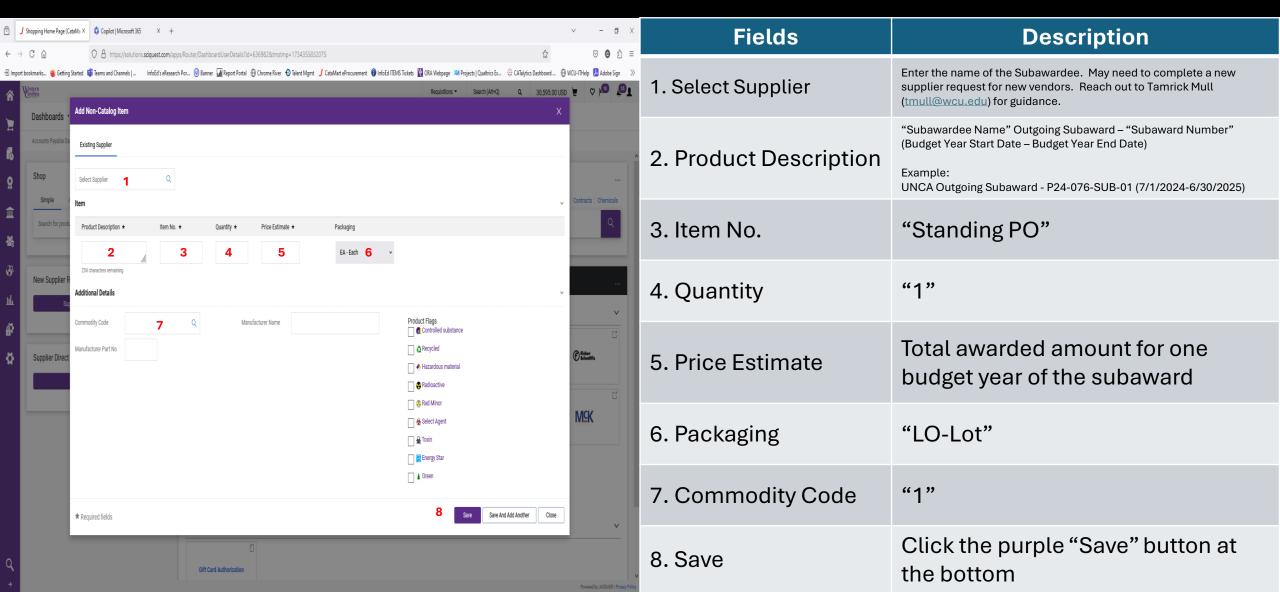# Outgoing Subaward Standing Order Step by Step

Office of Research Administration
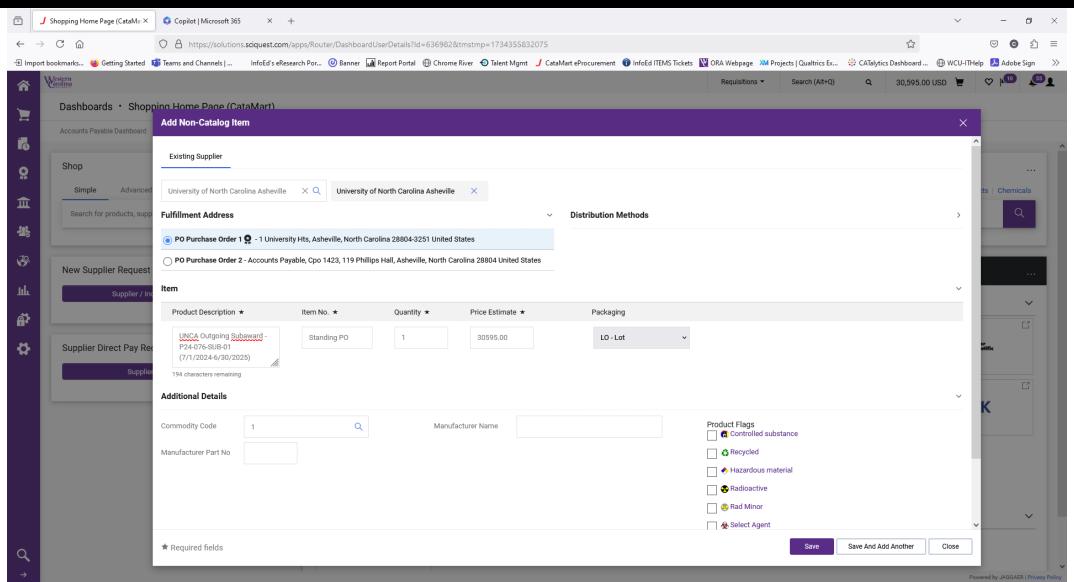
Step 1: Open a new, "Non-Catalog Item" cart

Step 2: Add a new, "Non-Catalog Item" cart

Fields	Description
1. Select Supplier	Enter the name of the Subawardee. May need to complete a new supplier request for new vendors. Reach out to Tamrick Mull (tmull@wcu.edu) for guidance.
2. Product Description	"Subawardee Name" Outgoing Subaward – "Subaward Number" (Budget Year Start Date – Budget Year End Date) Example: UNCA Outgoing Subaward - P24-076-SUB-01 (7/1/2024-6/30/2025)
3. Item No.	"Standing PO"
4. Quantity	"1"
5. Price Estimate	Total awarded amount for one budget year of the subaward
6. Packaging	"LO-Lot"
7. Commodity Code	"1"
8. Save	Click the purple "Save" button at the bottom

Step 3: View your cart

Fields	Description
1. Shopping Cart	Click the "Shopping Cart Icon" at the top right of the CataMart Screen
2. View My Cart	Click "View My Cart"

Step 4: Review and name cart

Fields	Description
1. Review Cart	Review the cart for accuracy
2. Name the cart	"Fund Number" Outgoing Subaward – "Subaward Number" (Budget Year Start Date – Budget Year End Date) Example: 123456 Outgoing Subaward - P24-076-SUB-01 (7/1/2024-6/30/2025)
3. Assign Cart (Optional)	Only do this if you do not have requester access for the fund number associated with the subaward. Assign to Tamrick Mull or Sara Leopard in Accounts Payable.
4. Proceed to Checkout	Click "Proceed to Checkout" to begin assigning fund number, account codes, and attaching internal documents

Step 5: Assign fund number and account code(s) associated with your outgoing subaward

Fields	Description
1. Accounting Codes	Scroll down to the "Accounting Codes" section and click the "Pencil" icon on the right. This will open the "Edit Accounting Codes" box
2. Enter the Fund Number associated with your subaward	Enter the fund number associated with your subaward
3. Apply the appropriate split for account codes	Use 219924 for the 1st $25,000 of the subaward. If the subaward is for more than $25,000, use 219925 for the remaining balance over $25,000
4. Select "Amount of Price"	Be sure to select "Amount of Price" from drop down instead of "% of Quantity"
5. Save	Click purple "Save" button. Make sure Approver on the "Summary" pane on the right side of the screen is the PI of the fund. Make sure Subtotal on the "Summary" pane on the right side of the screen matches the subaward amount for the current budget year.

Step 6: Add internal notes and attach subaward agreement

Fields	Description
1. Internal Notes and Attachments	Scroll down to the "Internal Notes and Attachments" section and click the "Pencil" icon on the right. This will open the "Edit Internal Notes and Attachments" box
2. Add note	Standing PO for an outgoing subaward to "Subawardee" in the amount of " Current Budget Year Total" for the period between "Budget Year Start Date" to "Budget Year End Date". Click purple "Save" button Example Standing PO for an outgoing subaward to UNCA in the amount of $30,595 for the period between 7/1/2024 to 6/30/2025.
3. Add Internal Attachment	Add the fully executed subaward agreement for this subaward. Click purple "Save Changes" button

Internal Notes and Attachments   1 ✏ ⋯

Internal Note   2   Standing PO for an outgoing subaward to UNCA in the amount of $30,595 for the period between 7/1/2024 to 6/30/2025.

Internal Attachments   3   Date   Add

↓ Fully Executed Subaward.pdf   11/13/2024   ⋯

External Notes and Attachments   ✏ ⋯ ⌄

Note to all Suppliers   *no value*

Attachments for all suppliers   Add

Step 7: Review and submit cart

Fields	Description
1. Review cart	Review cart to make sure all relevant information is entered accurately
2. Assign or Submit Cart	Click the "Assign Cart" button at the top right of the CataMart page. This option is available if you are not a requestor for this fund. Please assign the cart to Sara Leopard or Tamrick Mull. Click the purple "Place Order" button to submit the cart and send to grant fund PI for approval.
3. Record requisition number (optional)	Record the requisition number for quick look-up and reference.

Questions?

Please reach out to the Post Award team in the ORA

Post Award Manager	Post Award Grant Specialist
Ben Peters	Cameron Lopez
Ext: 2498	Ext: 2576
Email: bpeters@wcu.edu	Email: clopez@wcu.edu