Requesting Subcontracts and Processing Subcontractor Invoices under the Purchase Order System (Emory Express)

The process starts at the Office of Sponsored Programs (OSP) web site. Users must click on the Sub Request System link, located in the left navigation of the OSP home page (http://www.osp.emory.edu/electronic/sub/index.cfm). The page contains a screen shot of the system, an information sheet about what is required and access to the online form necessary to start the process. **The online form is used for all subcontract AND subcontract amendment or modification requests.** Completing the form provides OSP with standard pieces of information needed to process any subcontract or subcontract amendment or modification. Once the form has been completed and submitted, the OSP will initiate the subcontract or modification. Please be sure to complete block 14 which requests the departmental/school contact person. This person will be notified if additional information is needed and is also the person who is entered into the purchasing system (Emory Express) as the contact for the purchase order. **Additionally, this is the person expected to receive/approve the invoice after it has been reviewed with the PI.**

As the subcontract nears completion, OSP submits a purchase requisition to Procurement and Payment Services (PPS). The requisition includes the departmental/school contact name and their e-mail address. PPS system (Emory Express) accepts OSP’s requisition (OSP is a buyer in PPS for subcontracts and amendments/modifications) and creates the official purchase order number. Both OSP and the designated departmental/school contact are notified of the official purchase order number via e-mail. OSP includes the purchase order number in the subcontract document making it complete, allowing OSP to issue the subcontract to the subcontractor.

Invoices should be sent directly to **PPS at 1599 Clifton Road, NE, 3rd Floor, Atlanta, GA 30322-4250 or to the PPS e-mail address of actspay@emory.edu** as a PDF attachment. This will get the invoice into the procurement system for payment the quickest way with the least margin for error.

Once PPS has entered the invoice information into Emory Express, a copy of the subcontractor’s invoice document is also entered into WebOptix, allowing it to be reviewed before receipt/approval and ultimate payment. PPS has provided the below step-by-step process for approving invoices in Emory Express and viewing the invoice in WebOptix.
Approving Sub-Award Invoices in Emory Express

When your sub-award invoice is processed in Payment Services, you (the departmental/school contact of record for the purchase order) will receive an e-mail asking you to complete the Receiving Process in Emory Express. Follow these steps to “receive” your services and approve payments to the sub-contractors.

1. Log into Emory Express and look up the Purchase Order Number for Sub-Award. Tip: Change the “Search for” option on the top right of your Emory Express home page to “PO No.”, then enter your PO number from the e-mail and “Go” to quickly retrieve your PO.

2. Click on the Invoice Tab to view the invoice information. If you see multiple invoices, the most recent invoice will be shown on the bottom of the list.

3. To review the scanned image of the invoice for accuracy:
   a. Copy the “Voucher No.” from the Invoice tab in Emory Express.
   b. Access WebOptix from the Finance Division home page www.finance.emory.edu. There is a “Finance Shortcut” on the left column.
   c. After signing in using your Emory ID and password, paste the “Q” number into the AP Voucher Only section. Then eliminate the “Q” which isn’t part of the voucher number.
   d. Click “Query”.
   e. Select the correct year and “Open”. The image will appear.
   f. If you agree with the invoice, return to Emory Express to complete the receiving process. Before you leave, print a copy of the invoice or record the dollar amount of the invoice, rounded up to the nearest dollar for use in Emory Express.

4. In the “Available Actions” box on the top, right of your Purchase Order, choose the “create Qty Receipt” option and click “Go”.

5. In the “Quantity” box, change the amount to reflect what you wish to pay in whole dollars.

6. Click “Save”.

7. “Complete”.

The invoice is now approved and payment will remit to the supplier on the payment due date.

NOTES:

1. Please be sure the PI confirms that the subcontractor is appropriately conducting the study and that the PI approves the invoice prior to receiving the invoice.
2. In Emory Express, once receiving has occurred, the Invoice Status will change from “In-Process” to “Payable.”
3. If receiving is incomplete, please go into the comments section on the PO and enter a comment.

The department contact should receive ONLY the amount of the pending invoice (rounded up to a whole dollar) as invoices are received, not the entire amount of the subcontract.