Exercise 1 – Creating a Subaward

**NOTE: It is recommended to use Google Chrome or Firefox – Safari does not allow for the WalkMe extension due to Apple programming.

1. Login into the Kuali using your Business Systems ID and password
2. Click on **Research Home**
3. From the left-hand navigation:
    - Click on **Common Tasks**
    - Click on **Create Subaward** in the Subaward Card

Subaward Screen

Document Overview Section

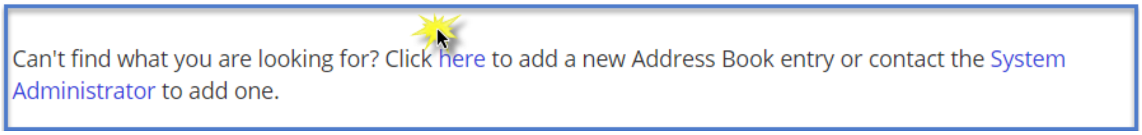
1. Enter a description in **Description** field (example: Initial Subaward Creation or Initial MCA)
2. Enter an explanation in the **Explanation** box (not required for Initial Creation)

Subaward Section

1. Enter the **Start Date** and **End Date** (dates of overall subaward period) example: 6/01/2020 – 5/31/2025
2. Select the **Subaward Type** from the dropdown menu
3. Select **1 - Draft** as the **Status** in the Status dropdown menu
4. Enter title in the **Title** field (enter the Prime Award Title as a best practice)
5. Enter the **Account ID –** Oracle Project and Task number separated by lower case “x”
6. Click the magnifying glass to search for **Requisitioner User Name** (do not just type in the name as the Unit will not populate and result in an error when saving)
7. Enter **F & A Rate** in the F & A Rate field - for MCA’s enter 0 (zero)
8. Select the **Cost Type** from the dropdown menu
9. Click the magnifying glass to search for the **Site Investigator** of the Subrecipient location
    - Enter search criteria and click on **search**

- Select **return value** next the appropriate user

If not in KR, add to the address book scroll down and click on the link provided to add a new Address Book entry



10. Click the magnifying glass in the **Subrecipient** field to search
    - Enter search criteria and click on **search for organization name**
    - Select **return value** next to the correct subrecipient
    - Click on the Address book to locate the Vendor ID
11. Enter the **Supplier Site ID** (this can be found in Oracle Supplier Report)

    For Multi Campus Awards you will **always** enter "INTERCAMPUS"

    NOTE: SUPPLIER SITE ID IS CASE SENSITIVE – MUST BE ENTERED EXACTLY AS DISPLAYED (EX: PAYMT CK 1 should not be entered as Paymt Ck 1; INTERCAMPUS should not be entered as InterCampus)

Funding Source Section

1. Click the magnifying glass to search for the Award Number
    - Click on the magnifying glass next to **Investigator** and search using the **UCSD PI Name**
    - Click **return value** for the correct PI
    - Click **Search**
    - Select the **return value** next to the correct Award
2. Click on the **Add** button at the end of the row under **Actions**

Contacts Section

1. Click the magnifying glass next to the **non-employee ID**
    a. Enter search criteria and click on **search**
    b. Select **return value** next the appropriate user
2. Select the **Project Role** from the dropdown menu

3. Click on the **Add** button at the end of the row under **Actions**
4. Click on **save** at the bottom of the screen
5. Navigate to the Financial Screen

Financial Screen

This is where you will enter your initial monetary information, as well as the obligation for the 1st Period of Performance*

History of Changes Section

1. In the **Effective Date** field enter the first date of the subaward
2. In the **Obligated Change** field enter the **amount to be paid** for the 1st Period of Performance
3. In the **Anticipated Change** field enter the Total project amount.
4. Select the **Modification Type** from the dropdown menu.

5. Enter the **Period of Performance Start Date**
6. Enter the **Period of Performance End Date**
7. In the **File Name** field click on **Choose File** to upload your budget.
8. Click **add** to save
9. Navigate to the Supplemental Info Screen

Supplemental Info Screen

Principal Investigator – UCSD Section

1. Click on **->show** to open the **Principal Investigator Section** and then click on the **magnifying glass** to search for the **UCSD Principal Investigator**
2. Enter the search criteria (last name, first name) and click on **search**
3. Select **return value** next to the correct investigator
4. Click on **Save**
5. Navigate to the Comments, Notes, Attachments Screen

Comments, Notes, Attachments Screen

Attachments Section

In the Attachments section you will upload the required documents, **Scope of Work** and **Prime Award.**

1. Select your **Attachment Type** from the dropdown menu
2. Enter a **Description** (for the **Prime Award**, Prime Award will be the file name)
3. **Choose File** under **File Name**
4. Click on **save**
5. Navigate to the Subaward Actions Screen

Subaward Actions Screen

Data Validation Section – NOTE: This Process has been updated, follow the instructions below:

1. Run a **Data Validation** check here (turning on Data Validation will determine if you have any errors or incomplete information prior to submitting into routing)
2. **DO NOT UPDATE STATUS TO *Ready for Negotiation* – You will submit in Draft first and then update to Ready for Negotiation – Steps 3 thru 7**
3. Click on **submit** – A green "Document was successfully submitted" appears.
    a. Document ID:Status = FINAL
4. Navigate back to the **Subaward** screen
5. Click on **edit** at the bottom of the screen
6. Update your **Status** to **2 – Ready for Negotiation**
7. Navigate to the **Subaward Actions** screen and click on **submit**
    a. Document ID:Status = Enroute

NOTE: This will be the only time you use DRAFT & READY FOR NEGOTIATION as a Status. Once the record is updated to ACTIVE by the Ancillary Agreements Team, it stays as ACTIVE until the record is CLOSED out.

NEW! Recall Button: After you have submitted your subaward to the Ancillary Team and the Status is *Enroute,* you have the *recall* option available (this button does not appear until the subaward has been submitted with a status of *Ready for Negotiation*). This will return the subaward to a status of *saved* and allow you to make edits and resubmit.

1. Click on Recall
2. Enter an explanation for recall in the popup box
3. Click *ok*

Exercise 2 – Adding a Modification

1. Click on **Common Tasks**
2. Navigate to the **Subaward Card**
    - Click on **Search Subawards**
    - Enter the **Subaward ID** in the Search Field
        i. If you are searching for a migrated record from Marketplace, enter the PO number in the Archive location.
    - Select **Document Status – Both**
    - Click on **Search**
    - Select **open** next the correct subaward

Subaward Screen

Document Overview Section

1. Scroll to the bottom of the screen and click on **edit**
2. Update the **Description**
3. In the **Explanation** field enter the explanation of the change
4. Click on **save**
5. Navigate to the Financial Screen

Financial Screen

History of Changes Section

6. In the **Effective Date** field enter the start date of the new **Period of Performance.**
7. In the **Obligated Change** field enter the dollar amount for the new **Period of Performance**
8. In the **Anticipated Change** if you are adding additional funding to your overall award, enter that amount here. Likewise, if you are decreasing funding from your overall award, subtract that number here.
9. Select the **Modification Type** from the dropdown menu.
10. Enter the **Period of Performance Start Date**
11. Enter the **Period of Performance End Date**
12. In the **Comments** field enter any additional notes for the Ancillary Agreements team (this is optional)
13. In the **File Name** field click on **Choose File** to upload your budget.
14. Click on **add**
15. Navigate to the Subaward Actions Screen

Subaward Actions Screen

Data Validation Section

1. Run a **Data Validation** check here (turning on Data Validation will determine if you have any errors or incomplete information prior to submitting into routing)
2. Click on **submit** – A green "Document was successfully submitted" appears.

Exercise 3 – Processing an Invoice

BEFORE YOU PROCESS AND SUBMIT YOUR INVOICE CHECK THAT THE REQUISITIONER IS ACCURATE. SUBMITTING YOUR INVOICE WITH AN INCORRECT REQUISITIONER CANNOT BE UNDONE. YOU WILL NEED TO SUBMIT A TICKET TO HAVE IT SUBMITTED BY THE IT TEAM.

1. Click on **Common Tasks**
2. Navigate to the **Subaward Card**
    - Click on **Search Subawards**
    - Enter the **Subaward ID** in the Search Field
    - Select **Document Status – Both**
    - Click on **Search**
    - Select **open** next the correct subaward
3. Navigate to the **Financial** tab

Invoices Section

1. Click on **add invoice** at the bottom of the screen
2. Enter a **Description** (best practice is the Subaward ID and the UCSD PI Name)
3. Enter the **Invoice ID** (best practice is the subrecipient invoice number)
4. Enter the **Start and End Date** (period of performance for the invoice)
5. Enter the **Amount Released** (amount of invoice)
6. Enter the **Effective Date** (best practice is date you are entering the invoice)
7. Enter **Comments** (optional)
8. Select **Choose File** to upload the invoice documentation

Exercise 4 – Approving an Invoice

1. Click on **Common Tasks**
2. In the Quick Links card click on **Action List**
3. Click on **Id** to open subaward (this will take you directly to the Subaward Invoice)
4. Click on **Approve**

Searching for a Migrated Subaward

16. Click on **Common Tasks**

17. Navigate to the **Subaward Card**

- Click on **Search Subawards**
- In the **Archive Location** field enter your MarketPlace PO number and click on **search**