

# Creating a New Subaward or Multi-Campus Agreement (MCA)

**\*\*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 Kualu using your Business Systems ID or Active Directory 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. You are creating a brand new subaward, so your Description should be either: **Initial Subaward Creation or Initial MCA** (if you are creating a Multi-Campus Award)
2. Enter an explanation in the **Explanation** box (not required for Initial Creation)

### Subaward Section

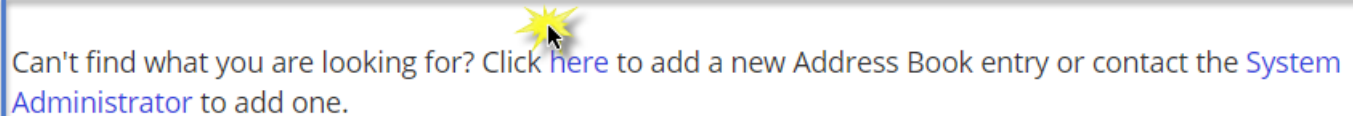
1. Enter the **Start Date** and **End Date** (dates of overall subaward period) example: 6/01/2020 – 5/31/2025
2. Select the **Subaward Type** from the dropdown menu
3. Select **1 - Draft** as the **Status** in the Status dropdown menu
4. Enter title in the **Title** field (enter the Prime Award Title 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 you are unable to locate the Site Investigator in Kuali, you will need to add them to the Address Book. Scroll down and click on the link provided to add a new Address Book entry.

[Instructions for Adding a new Address Book Entry](#)



Can't find what you are looking for? Click [here](#) to add a new Address Book entry or contact the [System Administrator](#) to add one.

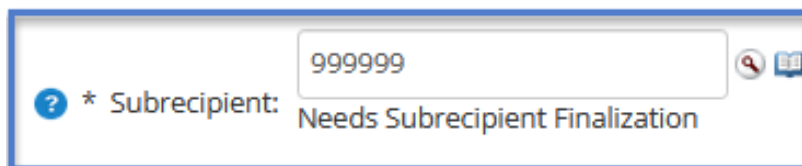
10. Click the magnifying glass in the **Subrecipient** field to search

- Enter search criteria and click on **search** at the bottom of the screen
- Select **return value** next to the correct subrecipient

If you are unable to find the subrecipient organization, please email [researchadmin@ucs.edu](mailto:researchadmin@ucs.edu). You will need to include:

- **Name of Organization**
- **Address**
- **Website**

We will add the new organization to Kuali and you will be notified when complete. This is a required field so you will either need to wait until the new organization is added to Kuali or you may enter 999999 as the organization and proceed with creating your subaward.

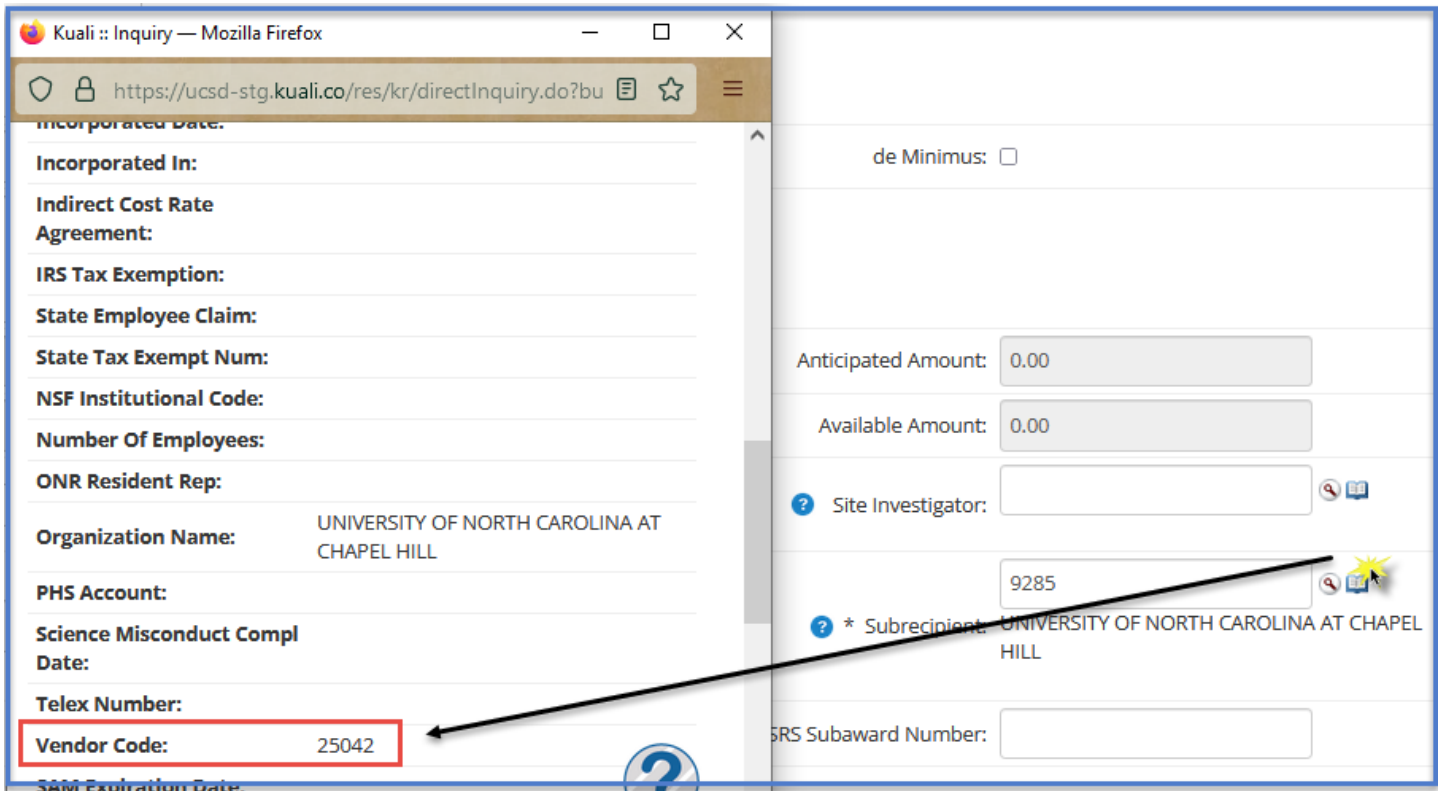


? \* Subrecipient: 999999 Needs Subrecipient Finalization

You will also need to check that the new organization has registered in Payment Compass. If they have not, you will need to send them an invite to register.

11. Enter the **Supplier Site ID** (this can be found in Oracle Supplier Report)

- Click on the Address book to locate the Vendor ID



You will use this code to locate the Supplier Site ID number in the Supplier Site ID Report. Do not enter the Vendor Code as the Supplier Site ID. Follow these instructions to run the Supplier Site ID (SSID) Report in Oracle.

In [Oracle](#), download the OFC Suppliers Report by going to the **Oracle dashboard > Reports and Analytics > click on the '>>' next to 'All Folders' > Shared Folders > Custom > UC San Diego > UCSD – OTBI Analyses > UCSD-A P2P OFC-Suppliers**

Once the report is downloaded, **search for the Vendor Code** in the **Supplier Number column**. Please note, sometimes the vendor code is listed more than once:

**For MCAs (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 1<sup>st</sup> 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 1<sup>st</sup> Period of Performance
3. In the **Anticipated Change** you may enter *either* the amount of the current period of performance **or** you may enter the total **subaward** project amount.
- 4.
5. Select the **Modification Type** from the dropdown menu.

6. Enter the **Period of Performance Start Date**
7. Enter the **Period of Performance End Date**
8. In the **File Name** field click on **Choose File** to upload your budget.
9. **Click add to save** this entry, then **Save** at the bottom of the screen.
10. 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

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.
  - a. Document ID:Status = FINAL
3. Navigate back to the **Subaward** screen
4. Click on **edit** at the bottom of the screen
5. Update your **Status to 2 – Ready for Negotiation**
6. 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.

**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*

## Adding a Modification

A modification is any change that you make to the subaward. For example (NCE – No Cost Extension; Adding more money and a new period of performance, etc.)

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** (failing to update the description from the previous entry can cause delays). This description conveys to the subaward team what you are requesting.
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** (if you are not entering a financial modification, enter 0.00 in this field).
8. **Anticipated Change** field – If you entered the total subaward amount in this field when you created your Initial Subaward or MCA **and** you are not adding (or subtracting) any money to the total subaward, enter 0.00. When you created your Initial Subaward or Initial MCA and you **only entered the amount for the 1<sup>st</sup> Period of Performance here**, you will enter the same amount here that you entered in the Obligated Change field for the new period of performance.
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** – **if you don't click on "add" this transaction will not be saved, even if you click on Save at the bottom of the screen.**
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.

## Processing an Invoice

**BEFORE** you process and submit an invoice, check to ensure that the requisitioner is accurate. Submitting your invoice to be approved by an incorrect requisitioner cannot be undone. You will need to email [researchadmin@ucsd.edu](mailto:researchadmin@ucsd.edu) and ask that they have ITS approve the invoice.

### [Instructions – Updating the Requisitioner](#)

You should also verify the Supplier Site ID prior to processing and submitting an invoice.

### [Instructions – Adding or Updating the Supplier Site ID](#)

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

**Stop here if your invoices are to be paid via WIRE PAYMENT – [Instructions for Wire Payments](#)**

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)

**NOTE: Start and End Date of the Invoice can't be outside of the Period of Performance dates for the subaward.**

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

## 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**

## Links to Knowledge Base Articles

- [Updating the Supplier Site ID](#)
- [Updating the Requisitioner](#)
- [Updating Account ID – Project/Task](#)
- [New Address Book Entry \(person\)](#)
- [Modification Types](#)
- [Verify Subaward Submission to OCGA](#)