SUBAWARD BRUINBUY REQUISITION SETUP

Revised April 29, 2014

BACKGROUND
This chapter assumes a basic understanding of how to use/navigate BruinBuy (BB). It is intended to provide subaward specific instructions only. For more detailed BruinBuy training, sign up for BruinBuy Preparers class through CHR and/or go through BruinBuy Online Training.

STEPS IN BRUINBUY
1. Log into BruinBuy
2. Create a “Special Request/Non-Catalog” order
3. Search Vendor Name & select Address that matches the subawardee’s remittance address
   a. Obtain remittance address directly from Subawardee’s Administrative contact. BB Vendor address should be exactly the same as #9 on the OCGA/Purchasing Subaward Checklist.
   b. If exact address does not exist in BB, follow instructions in “How to…VCK – Submit a New Vendor Setup Request” in BB How To Documents.
4. After clicking on green check bubble for appropriate VCK, thoroughly complete the Special Request / Non-Catalog screen. See below for sample & pointers.
   a. Class of Order – subawards are always “R” for requisition
   b. PAN Subject – suggest entering: Cost Center/Fund Name of Subawardee
   c. CC Self – check to receive a copy of the requisition to file with Subaward documents
   d. FAU
      i. Project Code: Enter abbreviation for Subawardee
      ii. Sub: Always Sub 07
      iii. Object Code: Especially important if F&A is Modified Total Direct Cost (MTDC)
         1. If 1st year total cost budget for subaward is $25,000 or less, enter 7310.
         2. If 1st year total cost budget for subaward greater than $25,000, enter 7300.
         3. If subaward’s 1st year total cost budget is greater than $25,000, check “Apply FAU to All Lines (except lines with FAU locked)?”
   e. Line Details:
      i. Line CD: COM
      ii. Description:
         SUBAWARD FOR THE PROJECT TITLED: __________
         BUDGET PERIOD: __________
         FUNDING FOR STATED PERIOD: $___________
PRINCIPAL INVESTIGATORS:
UCLA: ________________
YALE: ________________

SPONSOR: _______________
CFDA: ____________

AWARD #: ________________

TERMS AND CONDITIONS OF THE ATTACHED AWARD DOCUMENT ARE INCORPORATED HEREIN BY REFERENCE.

ii. Line 2
   1. Line Amt: ________ , if subaward is over $25K, enter exactly $25,000.00. 
      If less than $25K, enter full the subaward total. 
   2. LineCD: SVS 
   3. TaxCD: E 
   4. Exempt: N 
   5. Description: 

THE FUNDING FOR THIS SUBAWARD IS DIVIDED INTO TWO LINE ITEMS FOR UCLA ADMINISTRATIVE PURPOSES ONLY. THE TOTAL FUNDING FOR THE BUDGET PERIOD __________ IS SPECIFIED ABOVE.

6. FAU Distribution Pie – do only if 1st year total cost budget for subaward greater than $25,000. If 1st year TC budget is $25K or less, skip this step.
   a. Click lock icon to lock 
   b. Click color pie to change Object Code for this FAU only to 7310 
   c. Save/Close 

iii. Line 3 – only necessary if F&A is MTDC & 1st year total cost budget for subaward greater than $25,000. If not MTDC, enter entire subaward amount to Line 2.
   1. Line Amt: ________ (difference between sub total cost - $25,000)
   2. LineCD: SVS 
   3. TaxCD: E 
   4. Exempt: N 
   5. Description: 

BALANCE OF FUNDING SPECIFIED ABOVE.

iv. Line 4 – required if subaward will last more than 1 year. If unsure, add anyways. 
   1. Line Amt: 1.00 
   2. LineCd: SVS 
   3. TaxCD: E 
   4. Exempt: N 
   5. Description:
FUNDING FOR ANY FUTURE BUDGET PERIOD IS CONTINGENT ON THE AVAILABILITY OF FUNDS FROM THE PRIME SPONSOR.

f. Additional Info – click to go to “Special Request” screen to check “Receiving Required?”

5. Add attachments – Subaward Checklist plus any applicable documents below:

- Attach the following documents (if applicable):
  - Award Synopsis
  - Subrecipient institutional approval
  - Subrecipient Commitment form
  - IRB approval (if human subjects are used)
  - List of any additional required deliverable and/or reports
  - Scope of Work
  - Budget and Justification
  - Fair & Reasonable Cost Analysis form
  - IACUC approval (if animals subjects)
  - Subrecipient F&A (indirect cost) rate agreement (if subrecipient is not a university)
6. Click “Preview Submit” & “Review Distributions” to confirm all data entered is correct.

7. Submit
8. Print out a copy of the PAN notification for the Subaward files. See below for sample: