

SUBAWARD BRUINBUY PLUS REQUISITION SETUP

Revised August 5, 2025

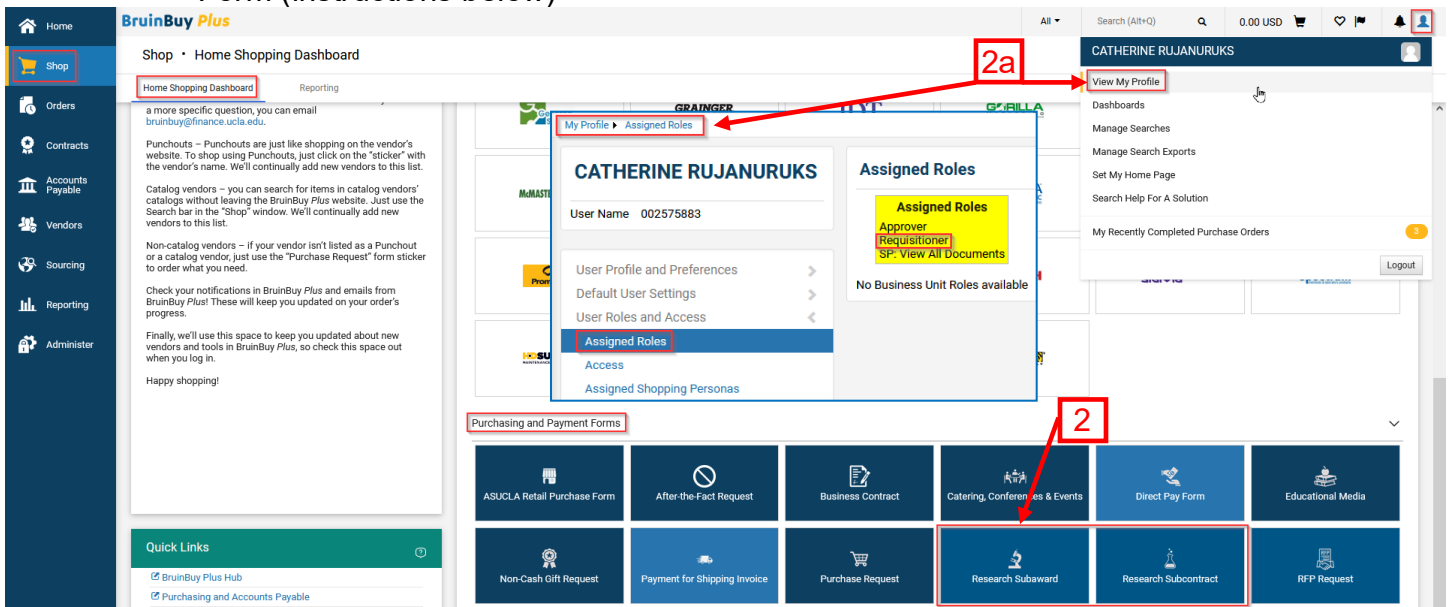
BACKGROUND

This chapter assumes a basic understanding of how to use/navigate BruinBuy Plus (BB+). It is intended to *provide subaward specific instructions only*. For more detailed BruinBuy Plus training, go to [BruinBuy Plus Hub](#). See [Subaward/Subcontract Tips & Resources Guide](#) for more information. Helpful Resource for Step-by-Step instructions: [Subaward Amendment QRG](#).

Recommend having the completed [OCGA Subaward & MCA Request Form](#) and grant's [Award Snapshot](#) on hand to assist with BB+ Subaward set up.

STEPS IN BRUINBUY PLUS

1. Log into [BruinBuy Plus](#)
2. Create a **“Research Subaward”** order in your **Home Shopping Dashboard**
 - a. If you do not see a Home Shopping Dashboard, view your profile to ensure you have Requisitioner access required to create/execute BB+ requisitions. If you do not, and should, a) take the [Campus Buyer training](#) and b) work with your Departmental Security Administrator (DSA), as needed
 - b. Complete each required tab of the Research Subaward Procurement Request Smart Form (instructions below)

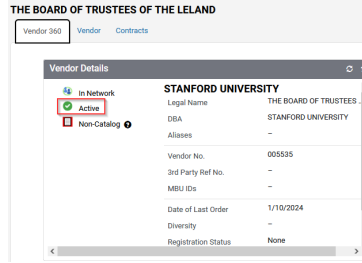


3. **Details:** Update **Form Name** to include Subaward Entity Name – PI: Sub PI's First Last Name

Research Subaward		Details	
Form Number	12579734	Form Name *	Stanford Subaward - PI: Sub PI First Last Name
Purpose	Procurement Request	Purpose	Procurement Request
Status	Incomplete	Template Title	Research Subaward
Instructions		Form Type	Requires Receiving
Details	✓	Currency	USD
Vendors	▲		
Form Fields	▲		
UCLA Department Inform...	▲		
Line Items	▲		
Review and Submit			

← Previous
Save Progress
Next >

- 4. **Vendors:** Search Registered Vendors by Subrecipient's Legal Name & **select "preferred" vendor**, if available. Address should match the subawardee's remittance address.
 - a. Obtain remittance address directly from Subawardee's Administrative contact.



- b. Confirm the Vendor chosen is "Active"
- c. If the Vendor does not exist as a Registered Vendor, click "Request Vendor Onboarding". See FAQs under "Vendor Management" in the [BB+ Hub](#).

5. **Form Fields: UCLA Department Information**

a. **Subaward Type:**

- i. **Always use New Subaward:** For any new Subawards set up in BB+
- ii. **NEVER use Subaward Amendment:** Due to BB+ issue, until further notice, do NOT USE Subaward Amendment in any situation!
 - 1. For all Subaward Amendments, use the "Subaward/Subcontract Amendment" Form in BB+

iii. **Will any of this work be performed in the USA?** Answer Yes/No

The image shows two screenshots of a web form titled "Subaward Type".

The left screenshot shows the "New Subaward or Subaward Amendment?" dropdown menu with "New Subaward" selected. Below it is the question "Will any of this work be performed in the USA" with radio buttons for "Yes" and "No".

The right screenshot shows the "Subaward Amendment" selected in the dropdown menu. Below it is the question "Does your Amendment require funding?" with radio buttons for "Yes" and "No". At the bottom, it also has the question "Will any of this work be performed in the USA" with radio buttons for "Yes" and "No".

******* Make sure to reference Legacy BB Subaward PO # for all migrated legacy POs so new BB+ requisition can be linked to legacy BB PO. Add legacy PO to multiple locations in BB+. See below for details. *******

b. **Subaward Questions:**

- i. **Project Period Begin Date:** Enter subaward **project** begin date. For the entire project period – beginning of whole subaward's participation.
- ii. **Project Period End Date:** Enter subaward **project** end date. For the entire project period – end of whole subaward's participation.
- iii. **Period of Performance Begin Date: Budget** period start date (for this current year increment)
- iv. **Period of Performance End Date: Budget** period end date (for this current year increment)
- v. **Fund Number:** Enter the 5 digit Fund Number from the full accounting unit (FAU)
- c. **Principal Investigator (PI):** Only full Name and Email is required. Responsible for subaward invoice approval, as PI. Double check for accuracy/typos.
- d. **Fund Manager:** Enter full name and email address of individual responsible for approving subaward invoices. Double check for accuracy/typos.

6. **Form Fields: Line Items**

- a. Number of lines needed is important if Indirect Costs/[F&A is Modified Total Direct Cost \(MTDC\)](#). Minimal of 1 line required if this is a new or funding amendment.
 - i. If **1st year** total cost budget for subaward is **\$25,000 or less**, **only 1 line** is required.
 1. Line 1: Use information in 6.b.i to enter appropriate Project Description.
 - ii. If **1st year** total cost budget for subaward **greater than \$25,000**, **set up 2 lines**.
 1. Line 1: Use information in 6.b.i to enter appropriate Project Description.
 2. Line 2: Use information in 6.b.ii.
 - iii. If **funding amendment**, and previous subaward accumulated balance already **exceeded \$25,000**, **only 1 line is required**.
 1. Line 1: Use information in 6.b.i to enter appropriate Project Description.
 2. **Include legacy BruinBuy PO #, if applicable, as the first piece of information in Line 1 Project Description.**

ADMINISTRATIVE USE ONLY

Object Code	Applicable Subs 03 04 05 07 08 09 9H	Restrictions	Object Code Title	Description
7300	X - X X X - -	ALLOWABLE	SUBCONTRACTS > \$25K, EXCL FROM OH	
7310	X - X X X - -	ALLOWABLE	SUBCONTRACTS < \$25K	

b. Line Details:

i. Line 1

1. Project Description

Legacy BruinBuy PO # _____ (include only if applicable)

Subaward for the Project Titled: _____

Sponsor: _____

Budget Period: _____

Funding for Stated Period: \$ _____

Key Personnel:

UCLA PI: _____

Subrecipient PI: _____

Sponsor Award #: _____

2. **Unit Price:** If subaward is over \$25K, enter exactly \$25,000.00. If less than \$25K, enter full the subaward total.

ii. Line 2: 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 1.

1. Project Description

Balance of funding specified above.

2. **Unit Price:** Difference between subaward total cost minus \$25,000 listed in Line 1 Unit Price

How many lines do you need? *

2

Line Detail Screenshot for New Subaward w/2 lines

Line 1

Product Description ★

Legacy BruinBuy PO # 1562GLA123
 Subaward for the Project Titled: Multi-Dimensional Outcome Prediction Algorithm for Hospitalized COVID-19 Patients
 Sponsor: NIH/NIDDK
 Budget Period: 07/01/2023 - 06/31/2024
 Funding for Stated Period: \$100,000.00
 Key Personnel:
 UCLA PI: Joseph Bruin
 Subrecipient PI: Winnie Pooh
 Sponsor Award #: TL1DK132768

659 characters remaining

Unit Price ★ 25000 USD 1 ★ 1 Total 0.00 USD

Unit of Measure ★ EA - EACH

Taxable No

Line 2

Product Description ★

Balance of funding specified above.

965 characters remaining

Unit Price ★ 75000 USD Quantity ★ 1 Total 0.00 USD

Unit of Measure ★ EA - EACH

Taxable No

Subaward Amendment Pricing

Number of Lines Needed *

2

Line Detail Screenshot for Subaward Amendment w/2 lines

Line 1

Product Description *

Legacy BruinBuy PO # 1553GZB123
Subaward for the Project Titled: Multi-Dimensional Outcome Prediction Algorithm for Hospitalized COVID-19 Patients
Sponsor: NIH/NIAID
Budget Period: 07/01/2023 - 06/30/2024
Funding for Stated Period: \$100,000.00
Key Personnel:
UCLA PI: Joseph Bruin
Subrecipient PI: Winnie Pooh
Sponsor Award #: 5R01AI123456-03

655 characters remaining

Unit Price * 25,000 USD Quantity * 1 Total 0.00 USD

Unit of Measure * EA - EACH

Service Start Date 07/01/2023

Service End Date 06/30/2024

Recommend leaving dates blank since not required. Otherwise Service Start Date must be a future date.

Taxable Yes No

Catalog No.

Line 2

Product Description *

Balance of funding specified above.

965 characters remaining

Unit Price * 75,000 USD Quantity * 1 Total 0.00 USD

Unit of Measure * EA - EACH

Service Start Date 07/01/2023

Service End Date 06/30/2024

Recommend leaving dates blank since not required. Otherwise Service Start Date must be a future date.

Taxable No

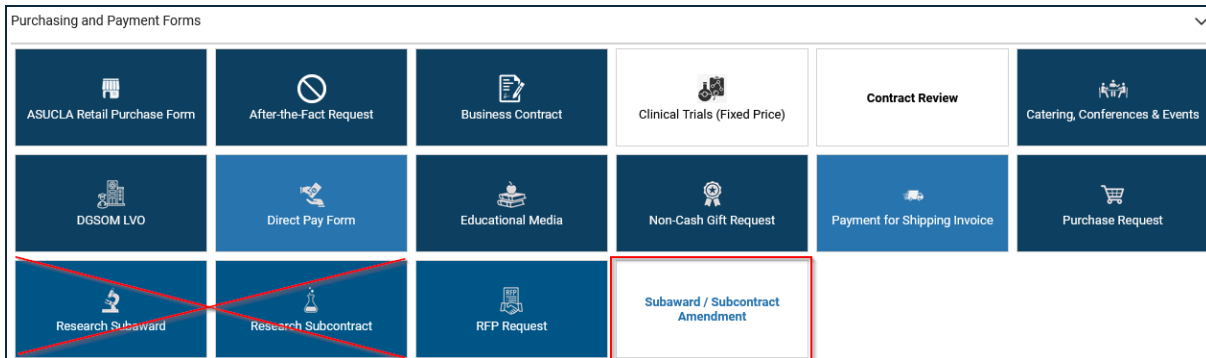
Catalog No.

7. Subaward Amendment: DO NOT USE SUBAWARD AMENDMENT AT THIS TIME.

- a. Amendment #: Enter amendment #. Increase by 1 for each amendment.
b. New End Date: If this is a continuation, enter new end date.
c. Will the UCLA Principal Investigator change? Answer Yes/No. If yes, add

- i. ~~PI's Name~~
- ii. ~~PI's Email~~
- d. ~~Will the Subrecipient PI change? Answer Yes/No. If yes, add~~
 - i. ~~Subrecipient PI's Name~~
 - ii. ~~Subrecipient PI's Email~~
- e. ~~Will the Fund Manager change? Answer Yes/No~~
 - i. ~~Fund Manager's Name~~
 - ii. ~~Fund Manager's Email~~
- f. ~~Are updates to FAU required? Answer Yes/No. If yes, update the FAU in the Accounting Codes section of the requisition.~~

8. **Subaward Amendment:** Use Subaward/Subcontract Amendment Form set in BB+




- a. Subaward Amendment Form is to create the following actions
 - i. No-Cost Extension
 - ii. Add Additional Funding
 - iii. Release Encumbrance / De-Obligate Funds
 - iv. Change FAU
 - v. Subaward Close-Out
 - vi. Subcontract Close-Out

While you can use a single form to submit multiple amendments for the **same purchase order (PO)**, you must submit a separate form for each PO you wish to modify.

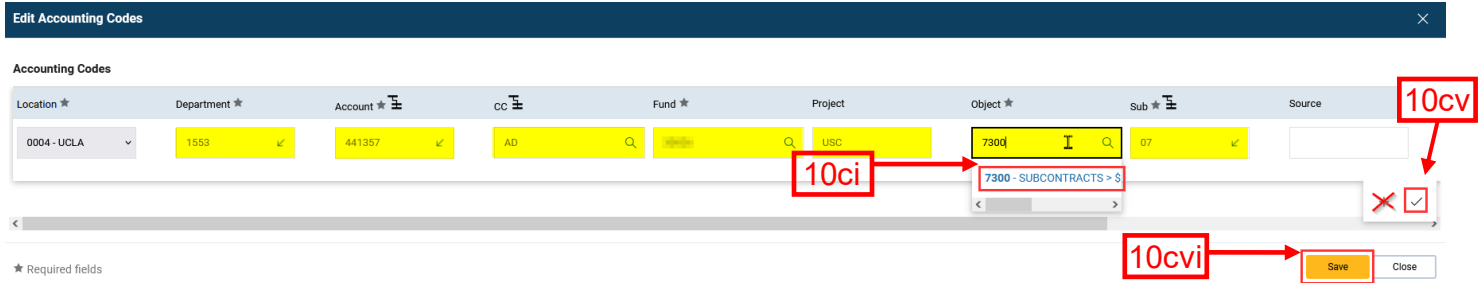
- b. Answer all questions in the form, each Type of Change will bring up a unique set of questions specific to the change requested
- c. Review & Submit > Submit

9. **Review and Submit:** After review of requisition and all required fields are complete, click “Add and go to Cart” to complete subward requisition

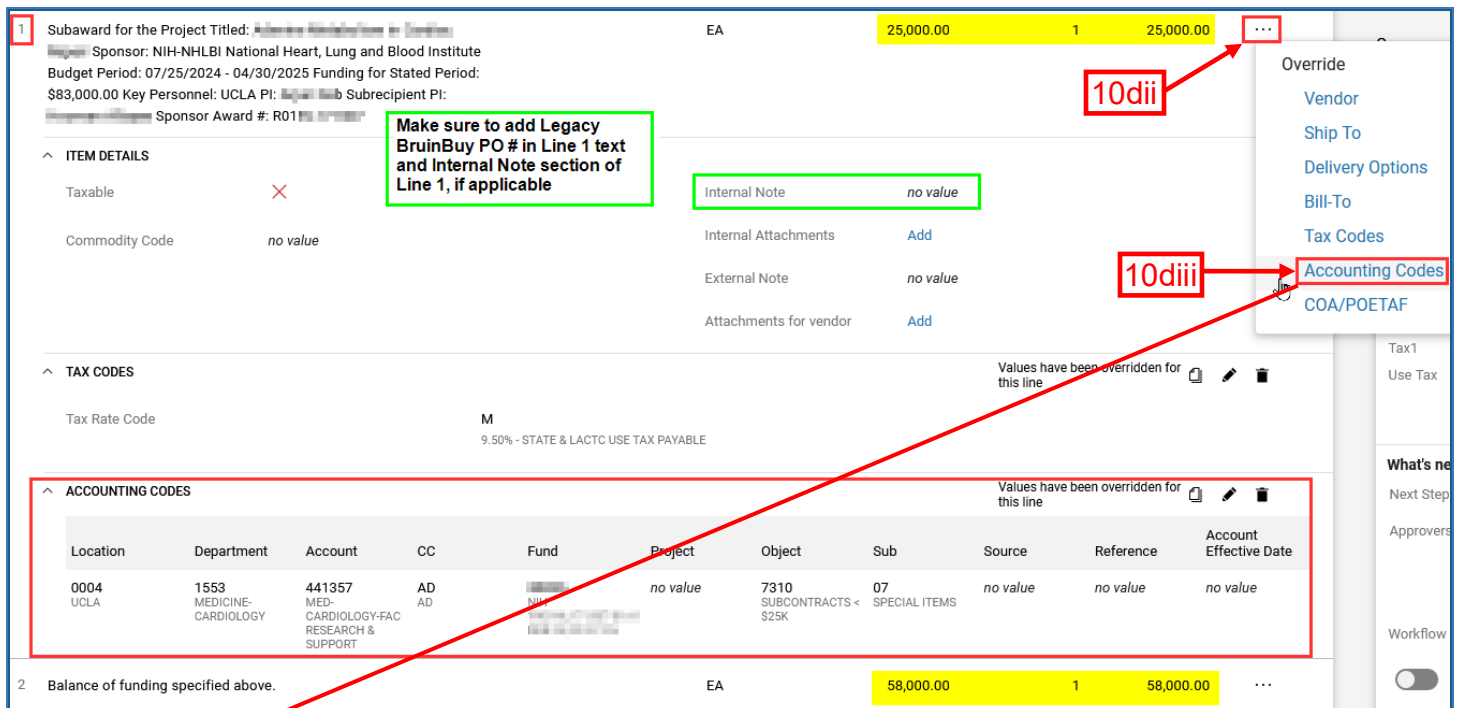
10. Go to Shopping Cart by clicking on the cart icon in the upper right to complete transaction
- Cart Name:** Add Dept specific order identifiers. Suggested format: Cost Center/Fund #/Subaward Entity (Legacy BruinBuy PO #, if applicable)
 - Description:** Add Legacy BruinBuy PO #, if applicable. If not, can leave blank.
 - Internal Note:** Add Legacy BruinBuy PO #, if applicable.
 - Click “Proceed to Checkout”

11. In the Requisition Page, complete the following by clicking on the pencil icon  to edit:
- General** – leave everything default *except* below:
 - Requires Receiving:** Choose “Yes”
 - Receiving Type:** Choose “Receiving required before payment (will never release for payment if not received)”
 - Declining Balance PO:** Choose “Yes”
 - If your subaward requires any specific criteria, i.e. wire transfer, make sure to choose appropriate value here
 - Shipping:**
 - Complete profile as necessary
 - Tax Rate Code:** Choose “#” for 0.00% No Rate – Use only for tax code “E” or “I”
 - Tax Code:** Choose “E” for Exempt (non-taxable)

- c. **Accounting Codes:** Complete fully. **Any alphabetical component of FAU must be ALL CAPS**; lower case letters are not allowed, i.e. cost center, project & source codes.
 - i. When typing in segments of FAU, select the values from the drop-down menus to ensure response is captured in BB+.
 - ii. **Project Code:** Recommend using first 6 characters to differentiate subaward entity. Especially useful when there are multiple subawards on the same fund.
 - iii. **Object Code:** Enter **only ONE single FAU** in this section, regardless if you have to split object codes. Use **7300 as default object code**, regardless of line amounts. See instructions below funding source is MTDC & lines are ≤ \$25K.
 - iv. **Sub Code:** Use **Sub 07** for all subaward FAUs
 - v. Once full FAU is complete, validate FAU by clicking on check mark ✓
 - vi. Save



- d. **# Line (Items):** Since you have chosen 7300 as the default object code, you need to update the object code for the amount ≤ \$25k to 7310. If you have just a single line single line ≤ \$25k, you would do it for that line. If you have or two lines split between ≤ \$25K and > \$25K, you would do it just for the line ≤ \$25K. *You may need to scroll down to see all lines.*
 - i. Recommend using 7300 as the overall/default accounting code in section 10.c
 - ii. Click on ellipses (...) in the upper right hand corner of line item 1
 - iii. Choose Accounting Codes
 - iv. Update Object Code to 7310 for the amount ≤ \$25K
 - v. Once full FAU is complete, validate FAU by clicking on check mark ✓
 - vi. Save



Override Line 1: Accounting Codes

Location *	Department *	Account *	CC	Fund *	Project	Object *	Sub *	Source
0004 - UCLA	1553	441357	AD			7310 7310 - SUBCONTRACTS < \$	07	

10div → 7310 → 10dv → Save

★ Required fields

12. Internal Notes & Attachments – Add any notes and attachments you would like to share with Campus Purchasing

- a. Required Attachments:
 - i. Current [Award Snapshot](#) – should reflect subaward entity in Section IV
 - ii. Completed [Subaward Checklist](#)
- b. Other possible attachment:
 - i. OCGA’s fully executed (FE) subaward agreement.
 - ii. No need to upload all other attachments requested in the subaward checklist. Those attachment only need to be email to OCGA for subaward agreement execution.

11ai →

Section IV: Subawards Approved in the Award	
Subawardee	Budget Period
Baylor College of Medicine	7/8/2021 - 6/30/2022
Bronx Veterans Medical Research Foundation, Inc.	
Foundation for Atlanta Veterans Education and Research, Inc.	
Greater Los Angeles Veterans Research And Education Foundation	
Lundquist Institute for Biomedical Innovation at Harbor-UCLA Medical Center	
Olive View-UCLA Education and Research Institute	
Baylor College of Medicine	7/1/2022 - 6/30/2023
Bronx Veterans Medical Research Foundation, Inc.	
Foundation for Atlanta Veterans Education and Research, Inc.	
Greater Los Angeles Veterans Research And Education Foundation	
Lundquist Institute for Biomedical Innovation at Harbor-UCLA Medical Center	
Olive View-UCLA Education and Research Institute	
Baylor College of Medicine	7/1/2023 - 6/30/2024
Bronx Veterans Medical Research Foundation, Inc.	
Foundation for Atlanta Veterans Education and Research, Inc.	
Greater Los Angeles Veterans Research And Education Foundation	
Lundquist Institute for Biomedical Innovation at Harbor-UCLA Medical Center	
Olive View-UCLA Education and Research Institute	

Internal Notes and Attachments	External Notes and Attachments												
<p>Internal Note</p> <p>See attached OCGA fully executed this sub Y3 amendment agreement completed prior to transition to BB+. OCGA just needs to provide sub with new BB+ PO#.</p> <p>Show less</p>	<p>Note to all Vendors <i>no value</i></p> <p>PO Clauses <i>no clause</i></p> <p>Attachments for all vendors Add</p>												
<p>Internal Attachments</p> <table border="1"> <thead> <tr> <th></th> <th>Date</th> <th>Add</th> </tr> </thead> <tbody> <tr> <td>UCLA-OCGA-subaward-checklist_GLA VR_Signed.pdf</td> <td>4/18/2024</td> <td>...</td> </tr> <tr> <td>20214238 01-02 GLAVREF 1553 G ZB 189_FE.pdf</td> <td>4/18/2024</td> <td>...</td> </tr> <tr> <td>31791_AwardSnapshotY3.pdf</td> <td>4/18/2024</td> <td>...</td> </tr> </tbody> </table>		Date	Add	UCLA-OCGA-subaward-checklist_GLA VR_Signed.pdf	4/18/2024	...	20214238 01-02 GLAVREF 1553 G ZB 189_FE.pdf	4/18/2024	...	31791_AwardSnapshotY3.pdf	4/18/2024	...	<p>11</p>
	Date	Add											
UCLA-OCGA-subaward-checklist_GLA VR_Signed.pdf	4/18/2024	...											
20214238 01-02 GLAVREF 1553 G ZB 189_FE.pdf	4/18/2024	...											
31791_AwardSnapshotY3.pdf	4/18/2024	...											
Has Comment <i>no value</i>													

13. Once everything is complete, “Validate FAU” in the upper right-hand corner.

- a. Correct any errors, if applicable.
 - i. Click on “History” tab to view explanation for errors.
 - ii. Common validation error: Transactor (you) do not have sufficient \$ amount approval to place order. Request increased \$ limit from DSA.

b. Place Order

14. Immediately email Subaward Checklist and all applicable attachment to OCGA @ ocgasubawards@research.ucla.edu referencing the BruinBuy+ Requisition # in the PO # field.

15. Print out a copy of the BB+ Requisition for the Subaward files.

16. Follow-up with OCGAs Outgoing Subaward Team (OST) as necessary until subaward is fully executed.