SUBAWARD BRUINBUY PLUS REQUISITION SETUP
Revised April 18, 2024

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.

Recommend having the completed OCGA Subaward Checklist 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
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. Choose the BB+ Vendor address that most closely matches #9 on the [OCGA/Purchasing Subaward Checklist](#).
   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. **New Subaward**: *Only for brand new, Year 1 Subawards set up in BB+
      ii. **Subaward Amendment**: For *all other* Subaward transactions
         1. **Does your Amendment require funding?**
a. No: If only administrative amendment, such as update to assigned Fund Manager or change in PI.
b. Yes: If amendment requires changes to funding $, choose “Yes”.

iii. Will any of this work be performed in the USA? Answer Yes/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. FAU Number: Not required, but can add FAU, if desired. Actual funding chart string will be added later in the subaward set up process.

c. Principal Investigator (PI): Only full Name and Email is required. Responsible for subaward invoice approval, as PI.

d. Fund Manager: Enter full name and email address of individual responsible for approving subaward invoices.

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

<table>
<thead>
<tr>
<th>Object Code</th>
<th>Applicable Subs</th>
<th>Restrictions</th>
<th>Object Code Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>7300</td>
<td>X - X X X -</td>
<td>ALLOWABLE</td>
<td>SUBCONTRACTS &gt; $25K, EXCL FROM OH</td>
<td></td>
</tr>
<tr>
<td>7310</td>
<td>X - X X X -</td>
<td>ALLOWABLE</td>
<td>SUBCONTRACTS &lt; $25K</td>
<td></td>
</tr>
</tbody>
</table>

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.
      3. **Quantity:** 1
      4. **Unit of Measure:** EA – EACH
      5. **Service Start Date:** *Recommend leaving blank since not required.* But if you want to list the date, the Start date must be a future date.
      6. **Service End Date:** *Recommend leaving blank since not required.*
      7. **Taxable:** No
      8. **Catalogue No:** Leave blank
   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
      3. All other fields remain the same as 6.b. above.
### Subaward Amendment Pricing

**Number of Lines Needed**

![Dropdown](36x763)

**Line 1**

<table>
<thead>
<tr>
<th>Product Description</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Legacy BruinBuy PO # 1553GZB123 Subaward for the Project Titled: Multi-Dimensional Outcome Prediction Algorithm for Hospitalized COVID-19 Patients</td>
<td>$25,000</td>
<td>1</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

**Unit:** EA - EACH

<table>
<thead>
<tr>
<th>Service Start Date</th>
<th>Service End Date</th>
<th>Taxable</th>
<th>Catalog No.</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/01/2023</td>
<td>06/30/2024</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

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

**Line 2**

<table>
<thead>
<tr>
<th>Product Description</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Balance of funding specified above.</td>
<td>$75,000</td>
<td>1</td>
<td>$0.00</td>
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</tbody>
</table>

**Unit:** EA - EACH

<table>
<thead>
<tr>
<th>Service Start Date</th>
<th>Service End Date</th>
<th>Taxable</th>
<th>Catalog No.</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/01/2023</td>
<td>06/30/2024</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

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

### 7. Subaward Amendment:

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

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

a. **General**
   i. **Requires Receiving:** Choose “Yes”
   ii. **Receiving Type:** Choose “Receiving required before payment (will never release for payment if not received)”
   iii. **Declining Balance PO:** Choose “Yes”
   iv. If your subaward requires any specific criteria, i.e. wire transfer, make sure to choose appropriate value here

b. **Shipping:**
   i. Complete profile as necessary
   ii. **Tax Code:** Choose “E” for Exempt

c. **Accounting Codes:** Complete fully.
   i. When typing in segments of FAU, make sure to click on the selection (rather than just typing in fields) 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:**
      1. **7310:** Choose for lines $\leq$ $25K on MTDC funds
      2. **7300:** Choose for lines $>25K$ on MTDC funds
      3. If both object codes/split F&A rates/2 lines are required, click on plus sign to add additional FAU to split between 7310/7300
   iv. **Source Code:** Use Sub 07 for all subaward FAUs
   v. Once full FAU is complete, validate FAU by clicking on check mark
   vi. Save
11. 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: OCGA’s fully executed (FE) subaward agreement. 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.

12. Once everything is complete, “Validate FAU” in the upper right-hand corner.
   a. Correct any errors, if applicable
   b. Place Order
13. Immediately email Subaward Checklist and all applicable attachment to OCGA @ ocgasubawards@research.ucla.edu referencing the BruinBuy+ Requisition # in the PO # field.

14. Print out a copy of the BB+ Requisition for the Subaward files. See next page for sample.
15. Follow-up with OCGAs Outgoing Subaward Team (OST) as necessary until subaward is fully executed.
## General

<table>
<thead>
<tr>
<th>Cart Name</th>
<th>D7/31791/GLAVREF Sub (1553GZB189)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounting Date</td>
<td>3/15/2024</td>
</tr>
<tr>
<td>Description</td>
<td>1553GZB189</td>
</tr>
<tr>
<td>Prepared by</td>
<td>INJEEL HARRIS</td>
</tr>
<tr>
<td>Prepared for</td>
<td>CATHERINE RUJANURUKS</td>
</tr>
<tr>
<td>Department</td>
<td>MEDICINE-DEPT ADMINISTRATION (1565)</td>
</tr>
<tr>
<td>Requires Receiving</td>
<td>Yes</td>
</tr>
<tr>
<td>Receiving Type</td>
<td>Receiving required before payment (will never release for payment if not received)</td>
</tr>
<tr>
<td>Declining Balance PO</td>
<td>Yes</td>
</tr>
<tr>
<td>Override Distribution</td>
<td>no value</td>
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<tr>
<td>Override Distribution Email Address</td>
<td>no value</td>
</tr>
<tr>
<td>Manual Check?</td>
<td>no value</td>
</tr>
<tr>
<td>Wire Transfer?</td>
<td>no value</td>
</tr>
</tbody>
</table>

## Contacts & Additional Approvals

### Buyer Contact Information

<table>
<thead>
<tr>
<th>Buyer Name</th>
<th><a href="mailto:arice@finance.ucla.edu">arice@finance.ucla.edu</a></th>
<th>Buyer Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anthony Rice</td>
<td><a href="mailto:arice@finance.ucla.edu">arice@finance.ucla.edu</a></td>
<td>Buyer Contract</td>
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</table>

### Additional Approvals

<table>
<thead>
<tr>
<th>CISO</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Export Control</td>
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</tr>
<tr>
<td>IRM</td>
<td>no value</td>
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<tr>
<td>Legal</td>
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</tr>
<tr>
<td>OCGA</td>
<td>no value</td>
</tr>
<tr>
<td>Privacy</td>
<td>no value</td>
</tr>
<tr>
<td>Tax Services</td>
<td>no value</td>
</tr>
<tr>
<td>TDG</td>
<td>no value</td>
</tr>
</tbody>
</table>

## Shipping

### Ship To

| Attn: CATHERINE RUJANURUKS/ K. KWAN DOM ORA (Suite 1820) 1100 Glendon Ave Suite 710 Los Angeles, CA 90024 United States |

### Delivery Options

- Expedite: X
- Ship Via: Best Carrier-Best Way

### Bill-To

| Attn: Accounts Payable 10920 Wilshire Blvd Los Angeles, CA 90024 United States |

## Tax Codes

- Tax Rate Code: no value
- Tax Code: E EXEMPT (non-taxable)

## Accounting Codes

<table>
<thead>
<tr>
<th>Location</th>
<th>Department</th>
<th>Account</th>
<th>CC</th>
<th>Fund</th>
<th>Project</th>
<th>Object</th>
<th>Sub</th>
<th>Source</th>
<th>Reference</th>
<th>Account Effective Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>0004</td>
<td>1553</td>
<td>441357</td>
<td>D7</td>
<td>31791</td>
<td>GLAVRE</td>
<td>7300</td>
<td>07</td>
<td>no</td>
<td>no value</td>
<td>no value</td>
</tr>
</tbody>
</table>
Internal Notes and Attachments

Internal Note
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#.

Internal Attachments
- 31791_AwardSnapsh...
- 20214238 01-02 GL...
- UCLA-OCGA-subawar...

Has Comment
no value

External Notes and Attachments

Note to all Vendors
no note

PO Clauses
no clause

Attachments for all vendors

Vendor / Line Item Details

GREATER LOS ANGELES VETERANS RESEARCH

GREATER LOS ANGELES VETERANS RESEARCH AND EDUCATION FOUNDATION, PO BOX 25027, LOS ANGELES, California 900250027 United States

Product Description
Catalog No
Size / Packaging
Unit Price
Quantity
Ext. Price

GLAVREF - PI: David Beenhouwer

1 Legacy BruinBuy PO # 1553GZB189
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: $58,430.00
Key Personnel: UCLA PI: Mario Deng Subrecipient PI: David Beenhouwer
Sponsor Award #: 5R01AI159946-03

Procurement Request: GLAVREF - PI: David Beenhouwer

Taxable
Commodity Code
no value
Internal Note
Legacy BruinBuy PO # 1553GZB189
Internal Attachments
<table>
<thead>
<tr>
<th>External Note</th>
<th>no note</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attachments for vendor</td>
<td></td>
</tr>
</tbody>
</table>

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Vendor subtotal</td>
<td>$58,430.00</td>
</tr>
<tr>
<td>Tax1</td>
<td>0.00</td>
</tr>
<tr>
<td>Use Tax</td>
<td>0.00</td>
</tr>
<tr>
<td>Vendor total</td>
<td>$58,430.00 <strong>USD</strong></td>
</tr>
</tbody>
</table>

Shipping, Handling, and Tax charges are calculated and charged by each vendor. The values shown here are for estimation purposes, budget checking, and workflow approvals.

<table>
<thead>
<tr>
<th>Subtotal</th>
<th>$58,430.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tax1</td>
<td>0.00</td>
</tr>
<tr>
<td>Use Tax</td>
<td>0.00</td>
</tr>
<tr>
<td>Total</td>
<td>$58,430.00</td>
</tr>
</tbody>
</table>