SUBAWARD BRUINBUY PLUS REQUISITION SETUP
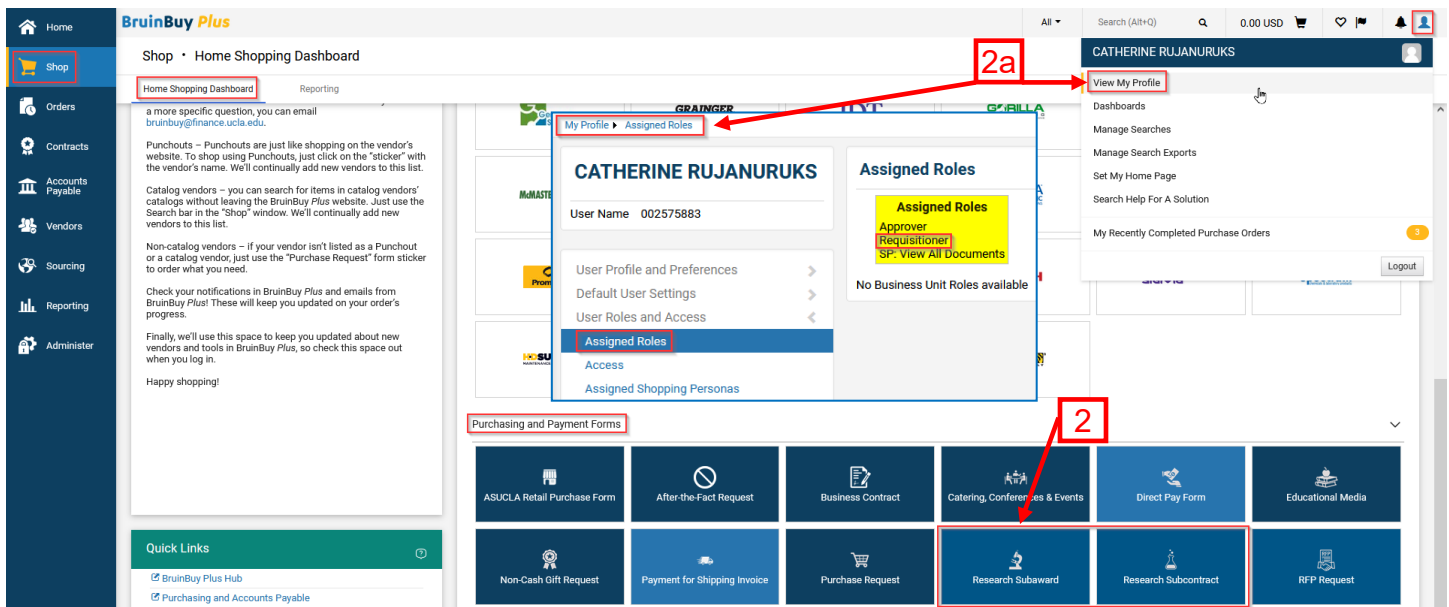*Revised April 18, 2024*

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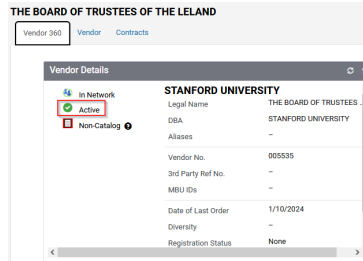
   b. Confirm the Vendor chosen is "Active"
   c. If the Vendor does not exist as a Registered Vendor, click "Request Vendor Onboarding". See FAQs under "Vendor Management" in the BB+ Hub.

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.**

Object Code	Applicable Subs 03 04 05 07 08 09 9H	Restrictions	Object Code Title	Description
ADMINISTRATIVE USE ONLY				
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.
    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 ★

2 ⌄

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   📅
                     mm/dd/yyyy

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

Service End Date   06/30/2024   📅
                   mm/dd/yyyy

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   📅
                     mm/dd/yyyy

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

Service End Date   06/30/2024   📅
                   mm/dd/yyyy

Taxable   No

Catalog No.

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 requsition

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.

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

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#.
Show less

Internal Attachments	Date	
↓ 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: no value

External Notes and Attachments

Note to all Vendors	no value
PO Clauses	no clause
Attachments for all vendors	Add

12. Once everything is complete, "Validate FAU" in the upper right-hand corner.

   a. Correct any errors, if applicable

   b. Place Order

Requisition • 184187534   👁 🖨 ? ⋯   Validate FAU   Assign Cart   Place Order

Summary   Taxes/S&H   PO Preview   Comments 1   Attachments 3   History

General ✏ ⋯   Shipping ✏ ⋯   Contacts & Additional Approvals ✏ ⋯ ⌄   Summary →|

Cart Assigned

Requisition Summary

		Options
Requisition number	184187534	Create new draft cart
Cart name	D7/31791/GLAVREF Sub (1553GZB189)	Recent orders
Requisition total	58,430.00 USD	Return to your home page
Number of line items	1	

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

UCLA Research Administration
Contract & Grant Administration

UCLA OCGA SUBAWARD CHECKLIST

ONCE COMPLETED, EMAIL THIS FORM WITH ALL REQUIRED BACKUP DOCUMENTATION NOTED BELOW TO: OCGAsubawards@research.ucla.edu
Please include the Requisition (New Subaward) or PO (Amendment) number in the e-mail submission subject line.

This form is to be used to request the issuance of any new or amended subaward from the OCGA Outgoing Subawards Team (OCGA - OST). The OST is responsible for outgoing subaward agreements under grants or cooperative agreements that are handled by OCGA. To request the issuance of a new or amended subcontract from UCLA Purchasing, please use the Subcontract Checklist found at: https://www.purchasing.ucla.edu/purchasing/Purchasing-forms.

☐ **NEW SUBAWARD**	☐ **AMENDMENT and/or CHANGE ORDER TO CURRENT SUBAWARD**
Under Requisition #_____	Under Purchase Order #_____ Amendment #_____
(Complete all sections below except IV.)	*(Complete all sections below.)*

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.

Summary - Draft Requisition 184187534

General

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

GASB Reporting

Leases / Rentals ✖

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	✖
Ship Via	Best Carrier-Best Way
Requested Delivery Date	

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)

Contacts & Additional Approvals

Buyer Contact Information

Buyer Name	Buyer Email	Buyer Position
Anthony Rice Anthony Rice	arice@finance.ucla.edu arice@finance.ucla.edu	Contract Buyer Contract Buyer

Additional Approvals

CISO	no value
Export Control	no value
IRM	no value
Legal	no value
OCGA	no value
Privacy	no value
Tax Services	no value
TDG	no value

OASISLoginID	BICYR

Accounting Codes

Location	Department	Account	CC	Fund	Project	Object	Sub	Source	Reference	Account Effective Date
0004	1553	441357	D7	31791	GLAVRE	7300	07	no	no value	no value

| UCLA | MEDICINE-CARDIOLOGY | MED-CARDIOLOGY-FAC RES & SUP/ BROWNELL | D7 | NIH-NIAID R01AI159946 DENG 06/26 56% | | SUBCONTRACTS > $25K, EXCL FROM OH / IMPROVEMENTS | SPECIAL ITEMS | value |

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 E 🌐

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

Contract	*no value*
PO Number	To Be Assigned
Quote number	
PO Clauses	
no clause	

	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		EA	58,430.00 USD	1	58,430.00
		Taxable ✖		Internal Note		Legacy BruinBuy PO # 1553GZB189
		Commodity Code	*no value*	Internal Attachments		

External Note	*no note*	
Attachments for vendor		

Vendor subtotal	**58,430.00**	
Tax1	0.00	
Use Tax	0.00	
Vendor total	**58,430.00**	**USD**

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.

Subtotal	**58,430.00**
Tax1	0.00
Use Tax	0.00
Total	**58,430.00**