Module 4

Subawards
After completing this module, you will be able to view, initiate and amend a supplier contract, and view invoices for a subaward.
VIEW SUPPLIER CONTRACT FOR SUBAWARD

Subaward Analyst

• Use the Find Supplier Contracts for Subaward report.
• Type in or select criteria using filters.
• Click OK.
**VIEW SUPPLIER CONTRACT FOR SUBAWARD**

Subaward Analyst

<table>
<thead>
<tr>
<th>Supplier Contract</th>
<th>Supplier</th>
<th>Subrecipient for Subaward</th>
<th>Service Lines for Supplier Contract</th>
<th>Locations</th>
<th>Contract Start Date</th>
<th>Contract End Date</th>
<th>Supplier Contract Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>SCON-00000276: Consortium Site</td>
<td>Indiana University</td>
<td>Indiana University</td>
<td>SCON-00000276 (Line 1)</td>
<td></td>
<td>09/15/2019</td>
<td>08/31/2020</td>
<td>Approved</td>
</tr>
<tr>
<td>SCON-00000278: For collaboration on sponsored research project</td>
<td>Kaiser Foundation Hospitals</td>
<td>Kaiser Foundation Hospitals</td>
<td>SCON-00000278 (Line 1)</td>
<td></td>
<td>07/01/2019</td>
<td>06/30/2020</td>
<td>Approved</td>
</tr>
<tr>
<td>SCON-00000279: A NEW subaward will be issued to Harvard University for Dr. Tambis contributions and work on the pr</td>
<td>President and Fellows of Harvard College</td>
<td>President and Fellows of Harvard College</td>
<td>SCON-00000279 (Line 1)</td>
<td></td>
<td>08/16/2019</td>
<td>05/31/2021</td>
<td>Approved</td>
</tr>
<tr>
<td>SCON-00000280: Dr. Michael Anne Gratton WUSTL subcontract Y1 for Dr. John Oghalai's blast R01 grant.</td>
<td>Washington University in St Louis</td>
<td>Washington University in St Louis</td>
<td>SCON-00000280 (Line 1)</td>
<td></td>
<td>01/01/2020</td>
<td>12/31/2021</td>
<td>Approved</td>
</tr>
<tr>
<td>SCON-00000281: Consortium Site</td>
<td>Rush University Medical Center</td>
<td>Rush University Medical Center</td>
<td>SCON-00000281 (Line 1)</td>
<td></td>
<td>05/15/2019</td>
<td>04/30/2021</td>
<td>Approved</td>
</tr>
</tbody>
</table>
To amend a supplier contract, from the Supplier Contract field, click Related Actions (three dots) and hover over Supplier Contract. Select Amend Supplier Contract.

Note: Only clinical trials will have “Change” as an option.
AMEND SUPPLIER CONTRACT FOR SUBAWARD

Subaward Analyst

- Select Amendment Type and Date
- Make appropriate changes and submit for review and approval.
• A grant is required to initiate a supplier contract. After Go Live, grant Worktags for subawards must be requested through SPA using the Award Line Establishment Form in Workday Business Forms Dashboard.

• Access the Business Forms Dashboard using the Workday Applications area or Search field.
Select the Award Line Establishment Request in the FDM tab.
**AWARD LINE ESTABLISHMENT REQUEST**

- Search for the **Request type** SPA – Award Line Establishment Request.
- Fill out and submit the request prior to initiating a Supplier Contract.
CREATE SUPPLIER CONTRACTS
Subaward Analyst

- To initiate a supplier contract, search for Create Supplier Contract.
- In Create Supplier Contract, add the Company, Supplier and Contract Type: Subaward, or Subaward for clinical trials (no obligations).
- Select Create Blank Supplier Contract. Optional to Copy Details from Existing Supplier Contract.
CREATE SUPPLIER CONTRACTS

Subaward Analyst

- Add the subaward Contract Information.

**Contract Information**

- **Company**: USC University of Southern California
- **Supplier**: Children's Hospital Los Angeles
- **Contract Specialist**: [Name redacted]
- **Contract Type**: Sub Award
- **Contract Name**: CHLA Example
- **Contract Reference**: DMS2012345
- **Contract Document Link**: [Link redacted]
- **On Hold**: [Box checked or unchecked redacted]
CREATE SUPPLIER CONTRACTS

Subaward Analyst

- Add subaward Terms and Amounts.
CREATE SUPPLIER CONTRACTS

Subaward Analyst

- In the **Service Lines** tab, add details for purchasing using +.
- Scroll right to reach all fields.
CREATE SUPPLIER CONTRACTS

Subaward Analyst

- Add Attachments, including Budget and Letter of Intent, as available.
- Submit for review and approval.
CREATE SUPPLIER CONTRACTS

Subaward Analyst

- Confirmation displays.
- Expand Details and Processes.
CREATE SUPPLIER CONTRACTS

Subaward Analyst

- Supplier contract goes to Grant Manager, followed by Department of Contracts and Grants (DCG) (sub-award specialist role) for review and approval. DCG can amend the supplier contract during their approval process.
VIEW SUPPLIER INVOICE FOR SUBAWARD

Subaward Analyst

• Use the Supplier Invoice Summary for Subrecipients report.
• Type in or select criteria using filters.
• Click OK.
## View Supplier Invoice for Subaward

### Subaward Analyst

<table>
<thead>
<tr>
<th>Company</th>
<th>Aging Days Greater Than</th>
<th>Subrecipient</th>
<th>Aging Days Less Than</th>
</tr>
</thead>
<tbody>
<tr>
<td>USC University of Southern California</td>
<td>0</td>
<td>Abington Neurological Associates, Ltd. Abt Associates Inc.</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Advance Clinical Research</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Advanced Clinical Research Network, Corp</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Advanced Memory Research Institute of NJ, PC</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>More (296)</td>
<td></td>
</tr>
</tbody>
</table>

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**Click the blue hyperlinks to drill into data.**

<table>
<thead>
<tr>
<th>Supplier Invoice</th>
<th>Invoice Number</th>
<th>Awaiting Persons</th>
<th>Subrecipient</th>
<th>Supplier Invoice Lines</th>
<th>Invoice Status</th>
<th>Invoice Date</th>
<th>Aging Days</th>
<th>Invoice Amount</th>
<th>Due Date</th>
<th>Payment Status</th>
<th>Paid In Full Date</th>
<th>Amount Due</th>
<th>Supplier Invoice Payments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>SINV-00202212</td>
<td>Jason Chan</td>
<td>UCLA</td>
<td>CONV-AWD-0004665: Homelessness Policy Research Institute 2018 - 535701 07/01/2018 (version 0)</td>
<td>In Progress</td>
<td>05/11/2020</td>
<td>331</td>
<td>$1.00</td>
<td>06/10/2020</td>
<td>Unpaid</td>
<td></td>
<td>$1.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td>SINV-00202243</td>
<td>Huy An Le</td>
<td>UCLA</td>
<td>CONV-AWD-0000547: Subcontract with UCLA for Dr. A. A. A. A. Support</td>
<td>In Progress</td>
<td>06/30/2020</td>
<td>281</td>
<td>$1,000.00</td>
<td>07/30/2020</td>
<td>Unpaid</td>
<td></td>
<td>$1,000.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td>SINV-00202302</td>
<td>Jason Chan</td>
<td>Regents of the University of California UCSD</td>
<td>CONV-AWD-00003513: Urban air pollution and neurobehavioral trajectories 09/09/2020 (version 0)</td>
<td>In Progress</td>
<td>04/19/2021</td>
<td>8</td>
<td>$114,080.00</td>
<td>04/29/2021</td>
<td>Unpaid</td>
<td></td>
<td>$114,080.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td>SINV-00202303</td>
<td>Iowa State University</td>
<td>CONV-AWD-0001368: Research study on the Thompson Scholars’ impact</td>
<td>CONV-AWD-00000511: subcontract for qualitative research support</td>
<td>Approved</td>
<td>04/19/2021</td>
<td>0</td>
<td>$31,780.00</td>
<td>05/19/2021</td>
<td>Paid</td>
<td></td>
<td>$0.00</td>
<td></td>
</tr>
</tbody>
</table>

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*Turn on the PDF viewer for a full view of the document.*

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*Image reference:* USC University of Southern California
Select the Related Actions (three dots) icon in the Supplier Invoice field, and hover over Supplier Invoice. Select the Supplier Invoice to view.
### View Supplier Invoice for Subaward

**Subaward Analyst**

#### View Supplier Invoice

<table>
<thead>
<tr>
<th>Supplier Invoice</th>
<th>Invoice Number</th>
<th>Status</th>
<th>Approved</th>
<th>Match Status</th>
<th>Matched</th>
<th>Payment Status</th>
<th>Paid</th>
</tr>
</thead>
</table>

#### Invoice Information

- **Company**: USC University of Southern California
- **Supplier**: Iowa State University
- **Remit To Connection**: Iowa State University - Remit-To: Ofc Of Sponsored Programs Adm (p718836)
- **Currency**: USD
- **Invoice Date**: 04/19/2021
- **Invoice Received Date**: (empty)
- **Total Invoice Amount**: $31,780.64
- **Amount Due**: 0.00

#### Terms and Taxes

- **Payment Terms**: Net 30 Days
- **Discount Date**: (empty)
- **Due Date**: 05/19/2021
- **Default Payment Type**: Check
- **Default Tax Option**: Calculate Tax Due to Supplier
- **Ship To Address**: 3551 Trousdale Parkway ADM 352 Los Angeles, CA 90089-9013 United States of America
- **Settlement Runs**: 07991
- **On Hold**: No
- **Supplier Document Received**: No
- **Supplier's Invoice Number**: (empty)
- **External PO Number**: (empty)
- **Referenced Invoices**: (empty)

#### Invoice Lines

<table>
<thead>
<tr>
<th>Invoice Line</th>
<th>Company</th>
<th>Item</th>
<th>Line Item Description</th>
<th>Business Document</th>
<th>Supplier Contract</th>
<th>Spend Category</th>
<th>Ship-To Address</th>
<th>Ship-To Contact</th>
<th>Tax</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>USC University of Southern California</td>
<td></td>
<td>Provide Qualitative Research as Lead and Researcher for TELC project with primary focus on UNO campus</td>
<td>SCON-000006611 (Line 1)</td>
<td>SCON-000006611: subcontract for qualitative research support</td>
<td>Subaward Expenditures (Research) (SC0600)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Matching**

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