

Module 4

Subawards



MODULE OBJECTIVES



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**.

Find Supplier Contracts for Subawards - Final - GV

Company	<input type="text"/>
Cost Center	<input type="text"/>
Subject to FFATA	<input type="text"/>
Months Remaining is Greater Than or Equal To	<input type="text" value="0"/>
Months Remaining is Less Than or Equal To	<input type="text" value="0"/>
Percent of Funds Remaining is Greater Than or Equal To	<input type="text" value="0"/>
Percent of Funds Remaining is Less Than or Equal To	<input type="text" value="0"/>
Supplier Start Date is After Or Equal To	<input type="text" value="MM/DD/YYYY"/>
Supplier Start Date is Before Or Equal To	<input type="text" value="MM/DD/YYYY"/>
Supplier End Date is After Or Equal To	<input type="text" value="MM/DD/YYYY"/>
Supplier End Date is Before Or Equal To	<input type="text" value="MM/DD/YYYY"/>
Total Contract Amount is Greater Than or Equal To	<input type="text" value="0"/>
Total Contract Amount is Less Than or Equal To	<input type="text" value="0"/>

Manage Filters
0 Saved Filters

VIEW SUPPLIER CONTRACT FOR SUBAWARD

Subaward Analyst

Find Supplier Contracts for Subawards - Final - GV PDF

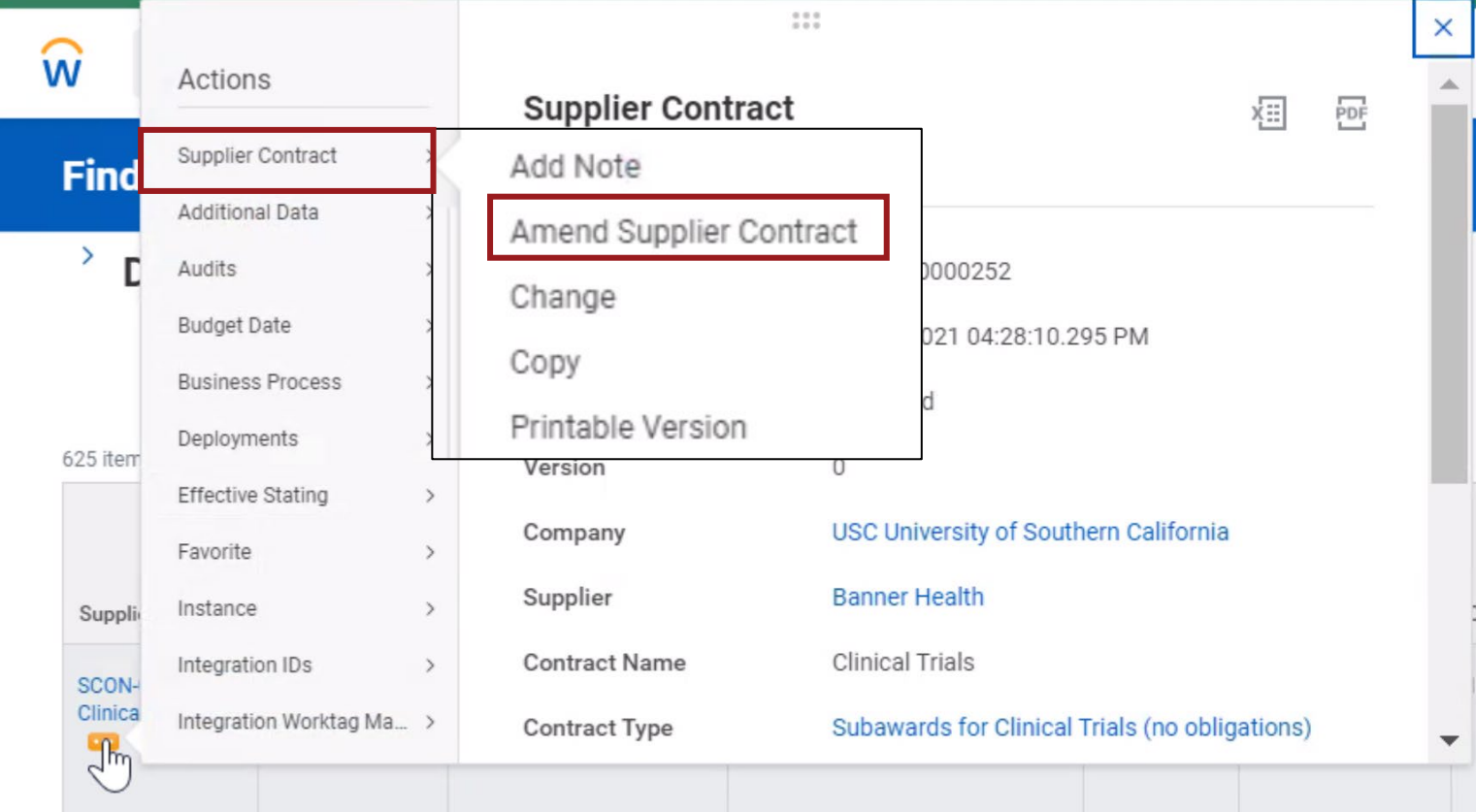
> Details Turn on the new tables view

617 items Grid Filter Print

Supplier Contract	Supplier	Subrecipient for Subaward	Service Lines for Supplier Contract	Locations	Contract Start Date	Contract End Date	Supplier Contract !
SCON-00000276: Consortium Site	Indiana University	Indiana University	SCON-00000276 (Line 1)		09/15/2019	08/31/2020	Approved
SCON-00000277: Subcontract to Abt Associates	Abt Associates Inc.	Abt Associates Inc.	SCON-00000277 (Line 1)		12/15/2019	12/14/2020	Approved
SCON-00000278: For collaboration on sponsored research project	Kaiser Foundation Hospitals	Kaiser Foundation Hospitals	SCON-00000278 (Line 1)		07/01/2019	06/30/2020	Approved
SCON-00000279: A NEW subaward will be issued to Harvard University for Dr. Tambe contributions and work on the pr	President and Fellows of Harvard College	President and Fellows of Harvard College	SCON-00000279 (Line 1)		08/16/2019	05/31/2021	Approved
SCON-00000280: Dr. Michael Anne Gratton WUSTL subcontract Y1 for Dr. John Oghalai's blast R01 grant.	Washington University in St Louis	Washington University in St Louis	SCON-00000280 (Line 1)		01/01/2020	12/31/2021	Approved
SCON-00000281: Consortium Site	Rush University Medical Center	Rush University Medical Center	SCON-00000281 (Line 1)		05/15/2019	04/30/2021	Approved

AMEND SUPPLIER CONTRACT FOR SUBAWARD

Subaward Analyst



The screenshot shows a software interface with a left sidebar and a main content area. The sidebar has a 'Find' button and a list of items. The main content area has a 'Supplier Contract' header and a list of actions. The 'Amend Supplier Contract' option is highlighted with a red box. The main content area also displays contract details for 'USC University of Southern California'.

Field	Value
Company	USC University of Southern California
Supplier	Banner Health
Contract Name	Clinical Trials
Contract Type	Subawards for Clinical Trials (no obligations)

- 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.

Create Supplier Contract Amendment

Contract Number **SCON-00000252** Version **1**

Amendment Information

Amendment Type * ☰

Amendment Date * Change Extension Renewal Termination

Amendment Number

Amendment Signed Date 📅

Amendment Description

Contract Information

Company * USC University of Southern California

Supplier * Banner Health

Contract Specialist * ☰

Contract Type * ☰

Contract Name *

Contract Reference

Contract Document Link

On Hold

Terms and Amounts

Start Date * 📅

Contract Signed Date 📅

End Date 📅

Total Contract Amount

Original Contract Amount 98,000.00

Line Extended Amount 98,000.00

Line Tax Amount 0.00

Spend Transactions

Invoiced PO Amount 0.00

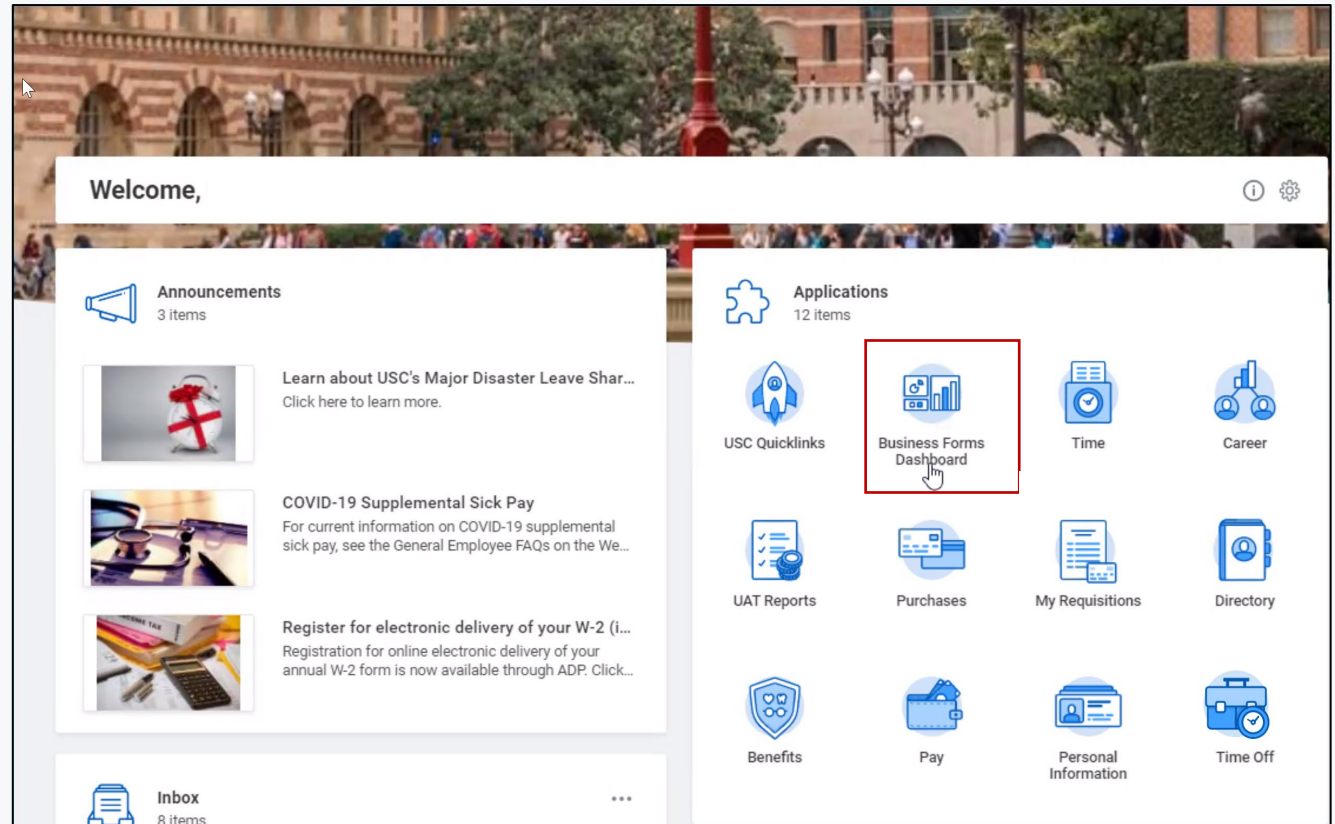
Non-PO Invoice Amount 0.00

Invoice Balance Remaining 98,000.00

Currency * USD

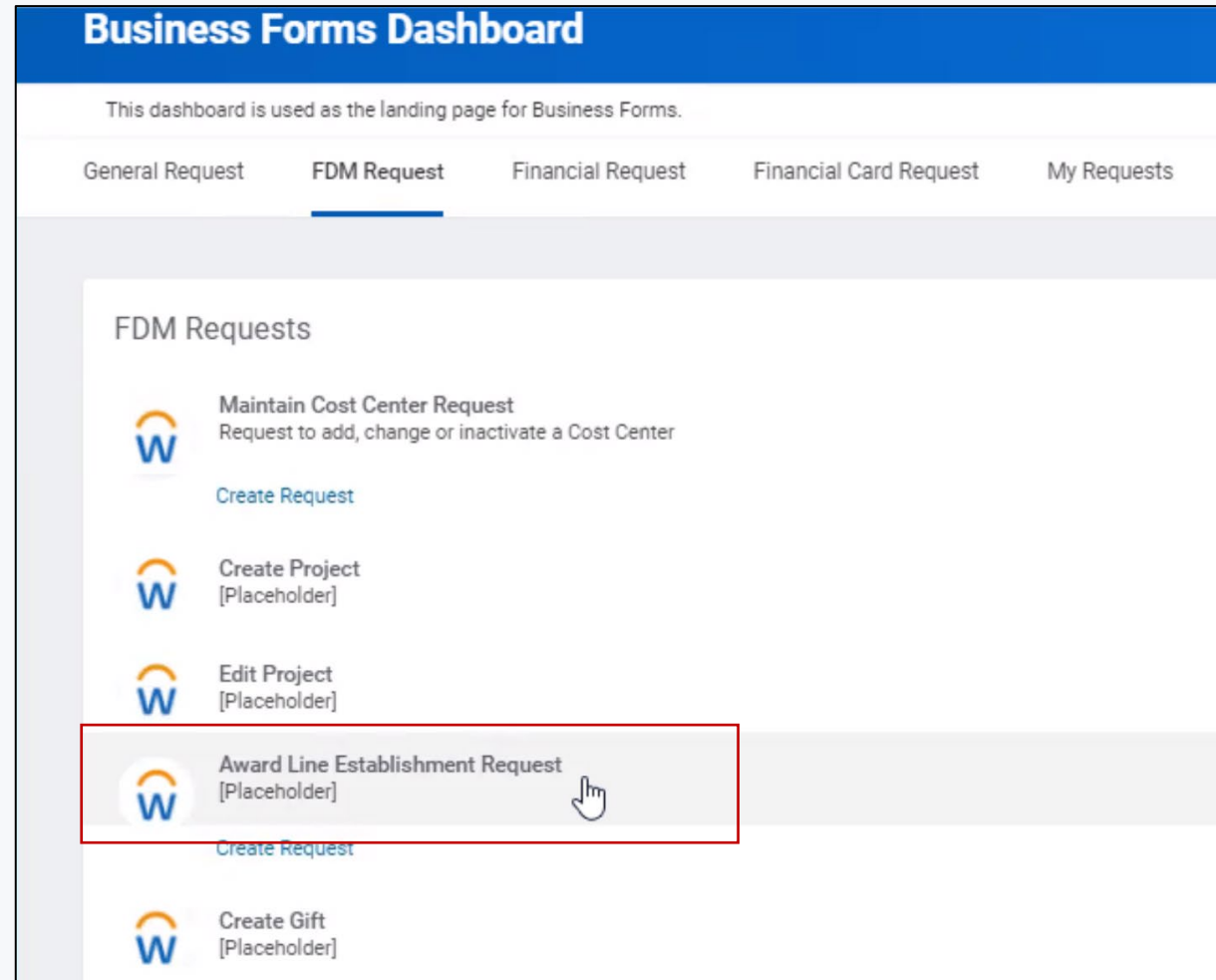
BUSINESS FORMS DASHBOARD

- 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.



AWARD LINE ESTABLISHMENT REQUEST

Select the **Award Line Establishment Request** in the **FDM** tab.









Business Forms Dashboard

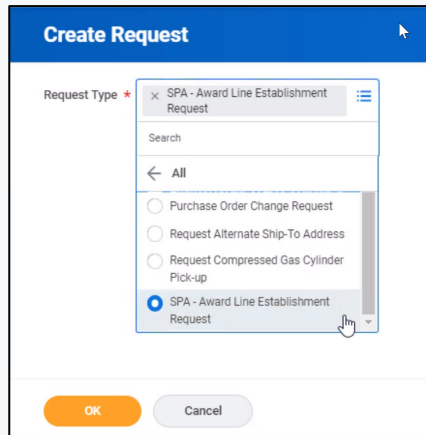
This dashboard is used as the landing page for Business Forms.

General Request **FDM Request** Financial Request Financial Card Request My Requests

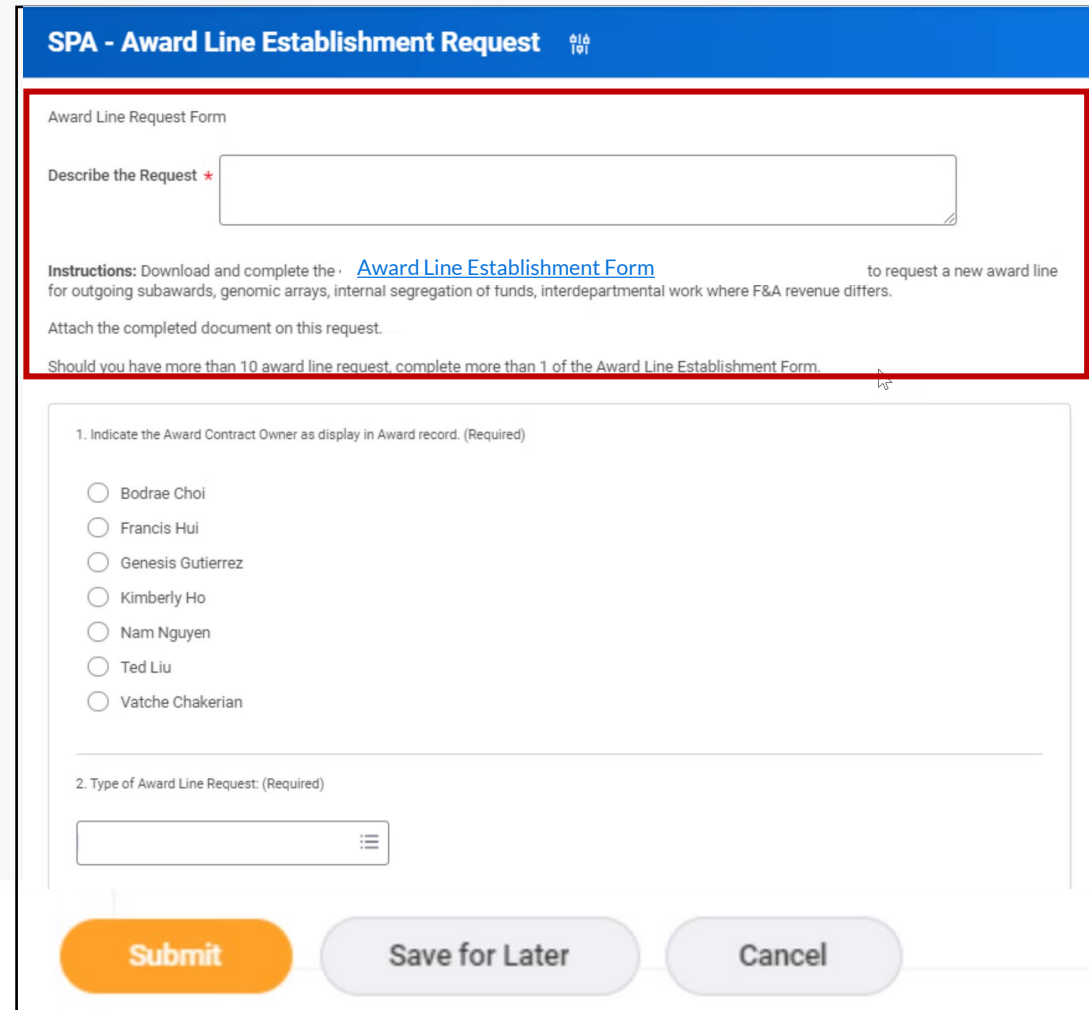
FDM Requests

-  **Maintain Cost Center Request**
Request to add, change or inactivate a Cost Center
[Create Request](#)
-  **Create Project**
[Placeholder]
-  **Edit Project**
[Placeholder]
-  **Award Line Establishment Request**
[Placeholder] 
-  **Create Gift**
[Placeholder]

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.



SPA - Award Line Establishment Request

Award Line Request Form

Describe the Request *

Instructions: Download and complete the [Award Line Establishment Form](#) to request a new award line for outgoing subawards, genomic arrays, internal segregation of funds, interdepartmental work where F&A revenue differs.

Attach the completed document on this request.

Should you have more than 10 award line request, complete more than 1 of the Award Line Establishment Form.

1. Indicate the Award Contract Owner as display in Award record. (Required)

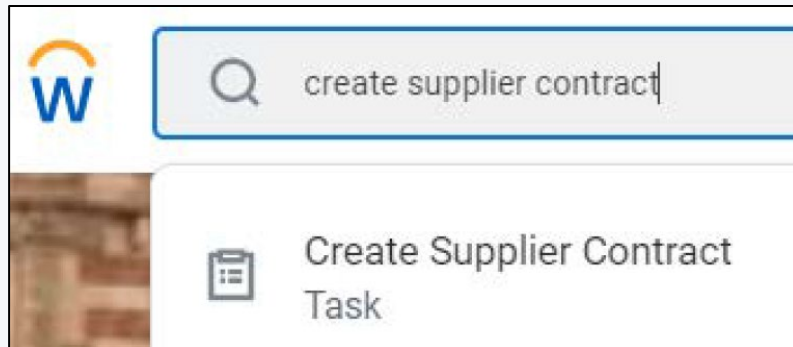
- Bodrae Choi
- Francis Hui
- Genesis Gutierrez
- Kimberly Ho
- Nam Nguyen
- Ted Liu
- Vatche Chakerian

2. Type of Award Line Request: (Required)

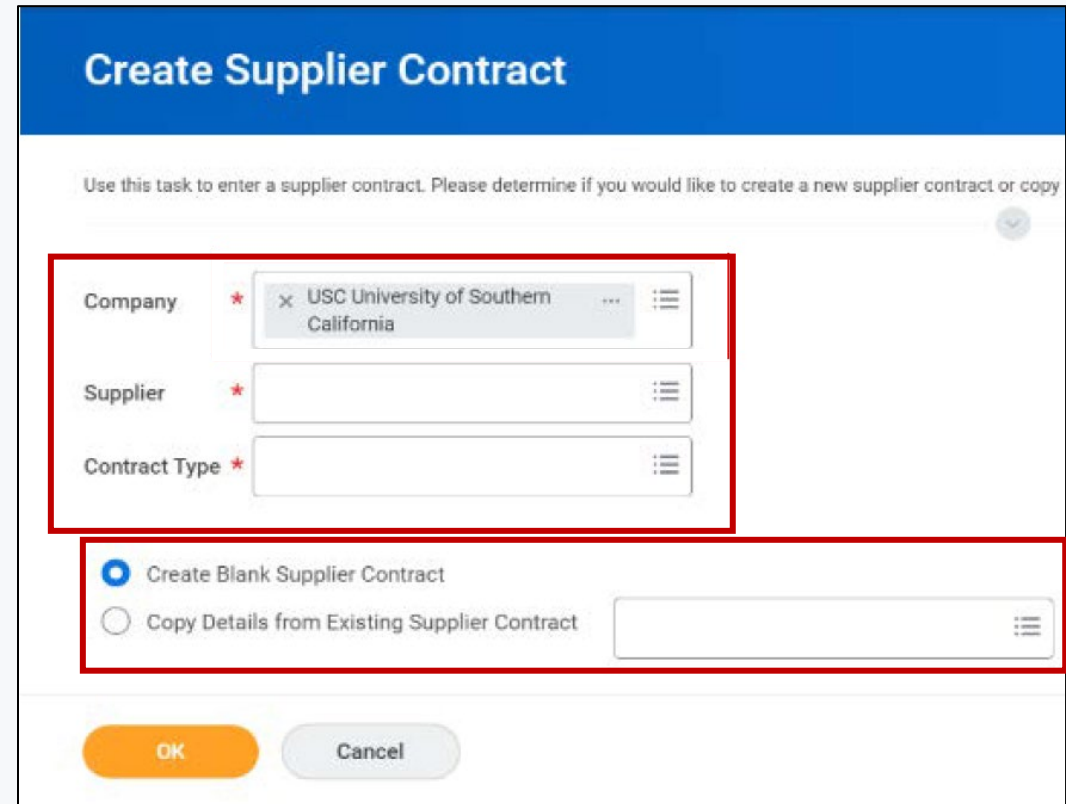
Submit **Save for Later** **Cancel**

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**.

A screenshot of a web form titled 'Create Supplier Contract'. The form has a blue header with the title. Below the header is a instruction: 'Use this task to enter a supplier contract. Please determine if you would like to create a new supplier contract or copy'. The form contains three required fields: 'Company' (with a dropdown menu showing 'USC University of Southern California'), 'Supplier' (with an empty dropdown menu), and 'Contract Type' (with an empty dropdown menu). Below these fields are two radio button options: 'Create Blank Supplier Contract' (which is selected) and 'Copy Details from Existing Supplier Contract' (with an empty dropdown menu). At the bottom of the form are two buttons: 'OK' (orange) and 'Cancel' (grey).

CREATE SUPPLIER CONTRACTS

Subaward Analyst

▼ **Contract Information**

Company *

Supplier *

Contract Specialist *

Contract Type *

Contract Name *

Contract Reference

Contract Document Link


On Hold


- Add the subaward **Contract Information**.


CREATE SUPPLIER CONTRACTS

Subaward Analyst

▼ **Terms and Amounts**

Start Date * 10/20/2020 


Contract Signed Date MM/DD/YYYY 


End Date 01/01/2021 

Total Contract Amount 100,000.00


Line Extended Amount 0.00

Line Tax Amount 0.00

Currency * x USD ... 

Default Tax Code 

Default Payment Type Check

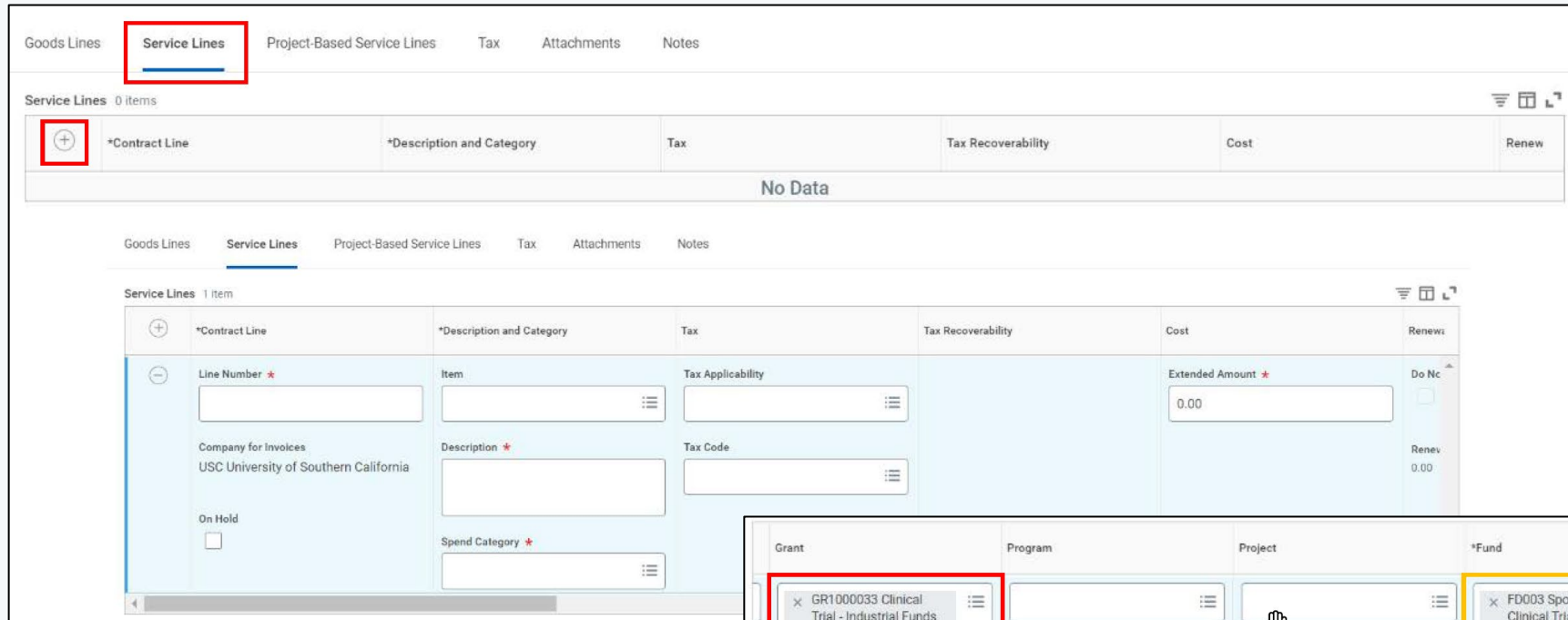
Override Payment Type 

Credit Card (empty)

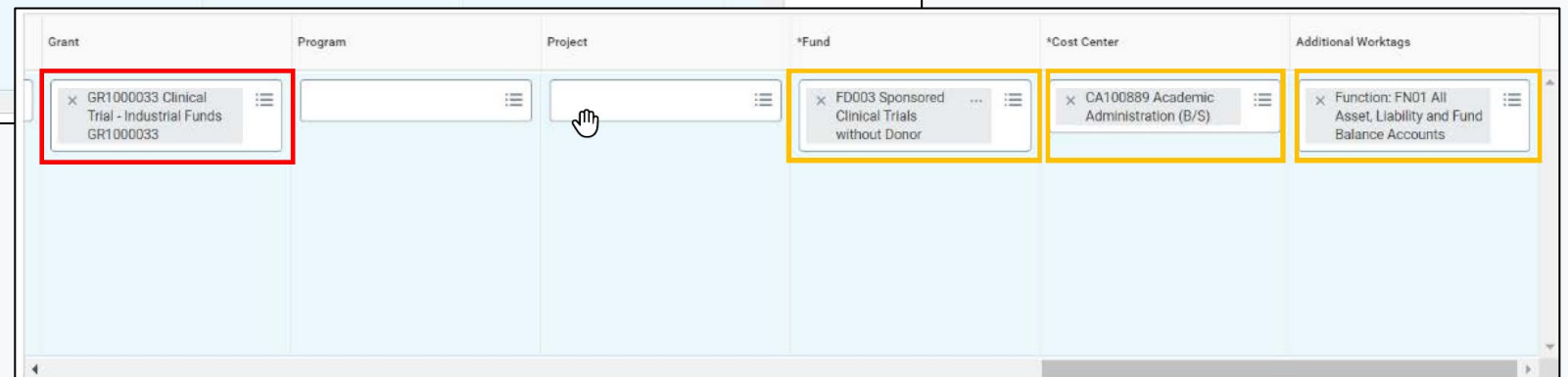
- Add subaward **Terms and Amounts**.

CREATE SUPPLIER CONTRACTS

Subaward Analyst



The screenshot shows the 'Service Lines' tab in a software interface. At the top, there are navigation tabs: 'Goods Lines', 'Service Lines' (highlighted with a red box), 'Project-Based Service Lines', 'Tax', 'Attachments', and 'Notes'. Below the tabs, there is a table with the following columns: '*Contract Line', '*Description and Category', 'Tax', 'Tax Recoverability', 'Cost', and 'Renew'. A red box highlights a '+' button in the first column. The table currently displays 'No Data'. Below this, there is a detailed view of a service line item with various input fields for 'Line Number', 'Item', 'Description', 'Tax Code', 'Spend Category', 'Extended Amount', and 'Renew'.



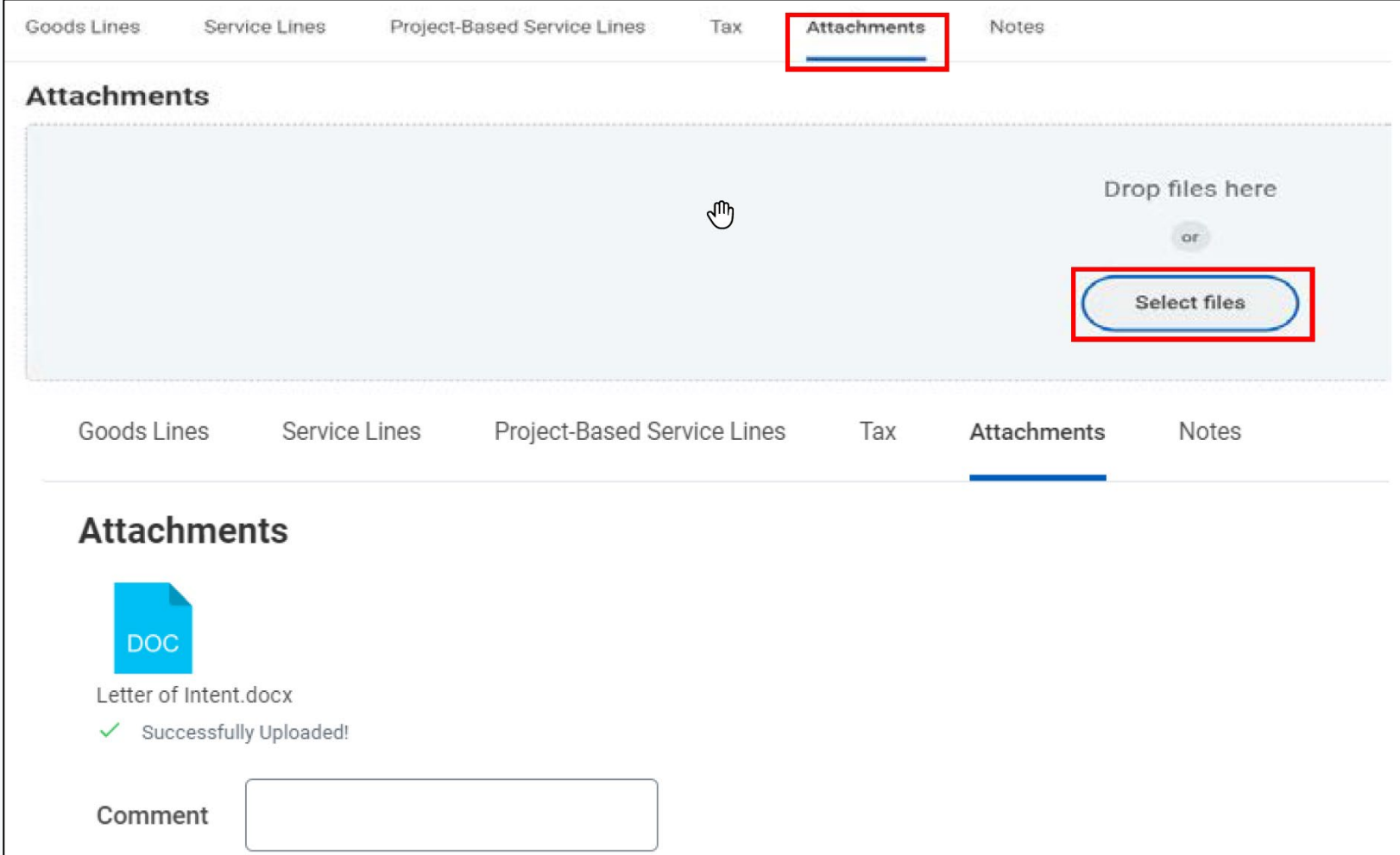
This screenshot shows a detailed view of a service line item. The 'Grant' field is highlighted with a red box and contains the text: 'GR1000033 Clinical Trial - Industrial Funds GR1000033'. The 'Fund' field is highlighted with a yellow box and contains: 'FD003 Sponsored Clinical Trials without Donor'. The 'Cost Center' field is highlighted with a yellow box and contains: 'CA100889 Academic Administration (B/S)'. The 'Additional Worktags' field is highlighted with a yellow box and contains: 'Function: FN01 All Asset, Liability and Fund Balance Accounts'. A hand cursor is visible over the 'Project' field.

- 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.




Goods Lines Service Lines Project-Based Service Lines Tax **Attachments** Notes

Attachments

Drop files here
or
Select files

Goods Lines Service Lines Project-Based Service Lines Tax **Attachments** Notes

Attachments

 DOC
Letter of Intent.docx
✓ Successfully Uploaded!

Comment

CREATE SUPPLIER CONTRACTS

Subaward Analyst

- Confirmation displays.
- Expand **Details and Processes**.

You have submitted
 Supplier Contract: SCON-000013 for Supplier: Children's Hospital Los Angeles starting on 10/20/2020 [Actions](#)

Up Next

Grant Manager
 Approval by Grant Manager
 Due Date 10/22/2020

Do Another

[Create Supplier Contract](#)

⌵ **Details and Process**

For [SCON-000013: Example](#)

Overall Process [Supplier Contract: SCON-000013 for Supplier: Children's Hospital Los Angeles starting on 10/20/2020](#)

Overall Status [In Progress](#)

Due Date [10/22/2020](#)

Details

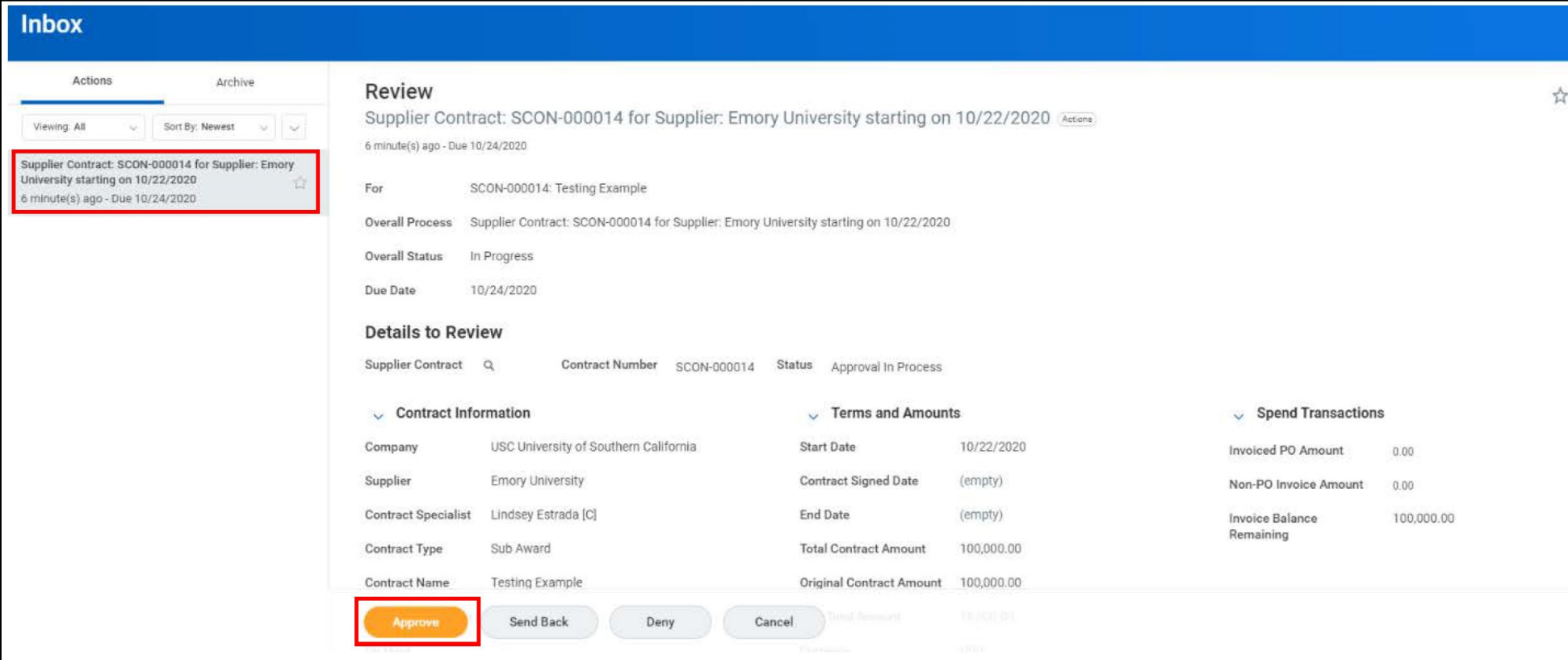
Process

Process History 9 items

Process	Step	Status	Completed On	Due Date	Person	Comment
Supplier Contract Event	Supplier Contract Event	Step Completed	10/20/2020 10:27:34 AM	10/22/2020	Lindsey Estrada [C]	
Supplier Contract Event	Approval by Grant Manager	Awaiting Action		10/22/2020	Carol Chau (Grant Manager)	
					Hiroki Lee (Grant Manager)	
					Kimberly Ho (Grant Manager)	
					Kimberly Ho (Grant Manager)	
					Kimmie Lu (Grant Manager)	
					Philip Chen (Grant Manager)	
					Tom Pham (Grant Manager)	
					Tom Pham (Grant Manager)	

CREATE SUPPLIER CONTRACTS

Subaward Analyst



Inbox

Actions Archive

Viewing: All Sort By: Newest

Supplier Contract: SCON-000014 for Supplier: Emory University starting on 10/22/2020
6 minute(s) ago - Due 10/24/2020

Review

Supplier Contract: SCON-000014 for Supplier: Emory University starting on 10/22/2020

6 minute(s) ago - Due 10/24/2020

For: SCON-000014: Testing Example

Overall Process: Supplier Contract: SCON-000014 for Supplier: Emory University starting on 10/22/2020

Overall Status: In Progress

Due Date: 10/24/2020

Details to Review

Supplier Contract	Contract Number	Status
SCON-000014	SCON-000014	Approval In Process

Contract Information		Terms and Amounts		Spend Transactions	
Company	USC University of Southern California	Start Date	10/22/2020	Invoiced PO Amount	0.00
Supplier	Emory University	Contract Signed Date	(empty)	Non-PO Invoice Amount	0.00
Contract Specialist	Lindsey Estrada [C]	End Date	(empty)	Invoice Balance Remaining	100,000.00
Contract Type	Sub Award	Total Contract Amount	100,000.00		
Contract Name	Testing Example	Original Contract Amount	100,000.00		

Approve Send Back Deny Cancel

- 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**.

Supplier Invoice Summary for Subrecipients

Company	* <input type="text" value="x USC University of Southern California"/> ...
Subrecipient	* <input type="text" value="x Abington Neurological Associates, Ltd."/> ... <input type="text" value="x Abt Associates Inc."/> ... <input type="text" value="x Advance Clinical Research"/> ... <input type="text" value="x Advanced Clinical Research Network, Corp"/> ... <input type="text" value="x Advanced Memory Research Institute of NJ, PC"/> ... MORE (296)
Supplier's Invoice Number	<input type="text"/>
Supplier Status	<input type="text"/> ...
Supplier Group	<input type="text"/> ...
Award	<input type="text"/> ...
Invoice Status	<input type="text"/> ...
Invoice Number	<input type="text"/>

Invoice Date On or After	<input type="text" value="MM/DD/YYYY"/> <input type="button" value="📅"/>
Invoice Date On or Before	<input type="text" value="MM/DD/YYYY"/> <input type="button" value="📅"/>
Aging Days Greater Than	<input type="text" value="0"/>
Aging Days Less Than	<input type="text" value="0"/>
Payment Status	<input type="text"/> ...
Due Date On or After	<input type="text" value="MM/DD/YYYY"/> <input type="button" value="📅"/>
Due Date On or Before	<input type="text" value="MM/DD/YYYY"/> <input type="button" value="📅"/>
Grant	<input type="text"/> ...
Supplier Contract	<input type="text"/> ...

VIEW SUPPLIER INVOICE FOR SUBAWARD

Subaward Analyst

Company [USC University of Southern California](#) Aging Days Greater Than 0

Subrecipient [Abington Neurological Associates, Ltd.](#) Aging Days Less Than 0
[Abt Associates Inc.](#)
[Advance Clinical Research](#)
[Advanced Clinical Research Network, Corp](#)
[Advanced Memory Research Institute of NJ, PC](#)
[More \(296\)](#)

Click the blue hyperlinks to drill into data.

Turn on the ne

27 items

Supplier Invoice	Invoice Number	Awaiting Persons	Subrecipient	Supplier Invoice Lines			Invoice Status	Invoice Date	Aging Days	Invoice Amount	Due Date	Payment Status	Paid In Full Date	Amount Due	Supplier Invoice Payments
				Award	Supplier Contract	Grant									
...	SINV-00202212	Jason Chan	UCLA	CONV-AWD-00004665: Homelessness Policy Research Institute 2018-535701 07/01/2018 (version 0)	SCON-00000255: UCLA will be a subcontractor	GR1047210 Homelessness Policy Research Institute 2018 - 5357018036	In Progress	05/11/2020	331	\$1.00	06/10/2020	Unpaid		\$1.00	
...	SINV-00202233	Myiam Le Patti Goldberger Philip Chen Shane Taylor Xue-jiao Luo	Childrens Hospital Los Angeles		SCON-00000347: Subcontract with CHLA for Dr. Amatruda	GR1030826 USC/Norris Comprehensive Cancer Center (Core) Support - 5351144880	In Progress	06/30/2020	281	\$1,000.00	07/30/2020	Unpaid		\$1,000.00	
...	SINV-00202302	Jason Chan	Regents of the University of California UCSD	CONV-AWD-00003513: Urban air pollution and neurobehavioral trajectory 09/09/2020 (version 0)	SCON-00000555: New subaward with UCSD in the amount of \$114,080 for the period 9/9/20 through 6/30/21.	GR1054418 Urban Air Pollution And Neurobehavioral Trajectories In The Abcd Study - 5351461074	In Progress	04/19/2021	8	\$114,080.00	04/29/2021	Unpaid		\$114,080.00	
...	SINV-00202303		Iowa State University	CONV-AWD-00001368: Research study on the Thompson Scholars Learning	SCON-00000611: subcontract for qualitative research support	GR1009906 Research Study On The Thompson Scholars Learning Communities At The	Approved	04/19/2021	0	\$31,780.00	05/19/2021	Paid	04/28/2021	\$0.00	31780.64 - Suppl Invoice: SINV-00202303

VIEW SUPPLIER INVOICE FOR SUBAWARD

Subaward Analyst

View Supplier Invoice

Supplier Invoice Invoice Number SINV-00202303 Status Approved Match Status Matched Payment Status Paid

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 (p7188386)

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

Invoice Reference Information

Ship-To Address: 3551 Trousdale Parkway ADM 352 Los Angeles, CA United States of America

Settlement Runs: 07991

On Hold: No

Supplier Document Received: No

Supplier's Invoice Number: sdf

External PO Number: (empty)

Referenced Invoices: (empty)

Invoice Lines Matching Summary Additional Fields Activity Process History

Invoice Lines 1 item

Invoice Line	Company	Item	Line Item Description	Business Document	Supplier Contract	Spend Category	Ship-To Address	Ship-To Contact	Tax
Q	USC University of Southern California		Provide Qualitative Research as Lead and Researcher for TSLC project with primary focus on UNO campus	SCON-00000611 (Line 1) Matching 2	SCON-00000611: subcontract for qualitative research support	Subaward Expenditures (Research) (SC0600)	3551 Trousdale Parkway ADM 352 Los Angeles, CA 90089-5013 United States of America		Tax Applicability Tax Code Withholding Tax Code Tax Point Date Type