

Subawards.com Instructions

Welcome to Subawards.com, a new and simple way of transmitting subaward proposal data to UCSC's Office of Sponsored Projects and other institutions using Cayuse for Grants.gov proposal submissions. Subawards.com eliminates document repetition over many proposals from your campus, lowers the risk of budget mistakes crossing over into Federal proposal forms, and ends the often-confusing practice of sending multiple PDF attachments and budget iterations to UCSC's Office of Sponsored Projects.

Once you have created an institutional account and profile in Subawards.com, your basic data remains in the system and can be used for each subaward proposal to UCSC and other institutions with Cayuse. Subawards.com has been developed by Evisions, the makers of Cayuse, but your institution does not need to be using Cayuse to access Subawards.com. However, by using Subawards.com, your institution benefits from the network of Cayuse users, therefore simplifying the process of document transfer and subaward support.

For your first session on Subawards.com, you will need to setup your institution:

- Select the Institutions tab or link.
- Search for your institution. If it is not already in the system, click the + Institution button.
- If it is already in the system, select.
- In the Institutional Name section, enter your legal institution name, address, DUNS, EIN, and Congressional District. This information will be automatically entered into the Subaward application from this section, and will be so for each subaward hereafter.
- Unless there are only 1 or 2 fringe benefits rates for all personnel at your university, we suggest leaving the Fringe Rates & Benefits section alone
- Setup your standard institutional indirect cost rate in the Indirect Costs section by clicking the + New Type button and entering in the applicable date range(s)/rate(s). Once complete, set the Default Indirect Cost Type for Budget Page Items, as this will allow for correct budget auto calculations.
- If desired, automated annual escalation rates can be set in the Escalation Rates tab.

Secondly, please set-up People:

- Select the People tab.
- Search for the first senior/key person to be added to the proposal. If they have not been entered into Subawards.com, select the + Person button.
- Enter in their name and click Create New Profile.
- If applicable, enter in their prefix and/or suffix and their NIH Commons ID.
- Add applicable information to all other sections.
- Add all other senior/key personnel who will be involved with the application from your institution.
- You will not need to add the biosketches here, as they can be added directly to the proposal.
- Each time you use Subawards.com, you are adding to the database of your key personnel that can cross over into multiple subawards with UCSC and other institutions.

Starting the Subaward Proposal

- Select the Subawards tab.

- Select + Create Subaward to start a new sub award.
- Fill in all the required information for the RR Performance Site, RR Key Persons, and RR Fed NonFed Budget. We suggest starting with the RR Key Persons form, as the RR Performance site and some RR Budget information can be auto filled based on the key personnel information.
- For the RR Budget, it is helpful to just complete the first budget period, click the Replication/Escalate button (blue staircase) at the top-right of the screen, input the desired replication/escalation information, and then click either the Escalate Selected Categories or Replicate Selected Categories button to auto fill the future budget periods.
- Upload the required biosketch(es) and budget justification
- Click on the Error (x) / Warning (x) / Info (x) button at the bottom of the screen to show all errors, warnings and helpful information associated with your subaward proposal. If you click on the individual errors or warnings, you will be taken to the site of concern and the specific field will be highlighted green.

Once the subaward proposal is complete, select the Export button on the left of the screen and email the resulting .cayuse file to your UCSC OSP representative. Note: you will not be able to open this file on your computer with Cayuse. Once we receive this file, the importing process will instantly populate our Cayuse file for this proposal.

User tips:

- The pencil buttons can be used to enter new information, and there is usually an option to select from institutional or people information already entered.
- The green circular arrows button (next your institutional name) automatically fills in information from the institutional and/or people profiles you created after they are selected.
- The staircase icon enables you to pre-set your replication/escalation rates across budget years.
- The Error/Warning/Info tab at the bottom of the page will clearly point out missing data, clicking on this tab will reveal the full list and direct access to each error/warning point.

To help us maintain our compliance files, we ask that you still continue to complete, sign, and email our standard Subrecipient Commitment Form and FFATA Addendum

(http://officeofresearch.ucsc.edu/osp/forms/SUB%202020subrecipient-commitment-form_V3.pdf).

Additionally, as only the biosketch and budget justification are uploaded into the .cayuse file, we also still need the following documents emailed to us...

- Most Recent A-133 Audit
- F&A Rate Agreement
- Scope of Work
- Any other agency required documents (ie Equipment, Facilities, etc.)