



Overview:

Subrecipients perform a portion of the project’s scope of work, subject to review and oversight by CSU’s lead PI.

Note: To add subrecipient information in all places needed in a proposal record, a user needs full edit access. This is the Aggregator Document Level role in Access section.

Procedure:

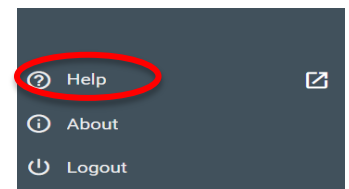
NOTE: In order to be added to the proposal, and for the budget Subaward section to be used, the subrecipient organization must be in our system’s Organization Table.

We ask that you first search, using a partial name with * or % wildcards, to see if the Organization is already in our database.

Go to 'All Links'. Begin typing 'Organization' into the search links field. Choose Organization, which will open the Organization lookup (search) page:

If you don't find the subrecipient using a name search:

From the Research Home page, click on **Help** in the lower section of the left navigation menu.



On the Help page in the Request New section, click the **New Organization** link, which will open a request form in a new tab.

Complete the fields as indicated. This form will route to OSP for review. A response will be sent to the submitter when the Organization record has been added to our system.



Once the Organization is available, add the information to the KR PD record and budget according to the following:

In the **Proposal Basics, Sponsor & Program Information** section, Check the box for Subawards:

In the **Proposal Basics, Organization and Location** section:

- Add the subrecipient organization(s)

In the **Attachments** section:

- **BEST PRACTICE:** It is 'best practice' to add a separate entry for each organization (not for each file) in **Internal** section:
 - Combine all documents (into PDF) for each subaward organization.
 - Commitment letter and/or form, scope of work, budget & budget justification
- The budget can be attached here in Excel or PDF format.
 - If the subrecipient has used a compatible Grants.gov Subrecipient R&R Budget form, it can be uploaded in the **Budget > Subawards** section



Type: Choose Subcontract Documents
Description: Enter the Subrecipient name

Budgeting subaward costs: Subawards section

If the organization is in our system, and there are no sponsor indirect cost restrictions or special circumstances that affect subaward expenses, use the **Subawards** section for budget entry:

1. Click Add Subaward

2. Use Organization Lookup to find subrecipient

3. Use partial name search to restrict results



4. Select to return the code to the add subaward lightbox

Organization Lookup

One item retrieved.

Show 10 entries

Actions	Organization Id	Organization Name	Address	Federal Employer Id	Congressional District	Contact Address Id	DUNS Number	DUNS Plus Four Number	Human Sub Assurance
4 select	000054	Kansas State University	2 Fairchild	480771751	KS-002	54	929773554		

search term beginning with the partial name Kansas* returns this result

5. Click 'Add Subaward'.

Add Subaward

Organization Id: 000054

File Name: Choose File No file chosen

Comments:

5 ★ Add Subaward

select returns the code for the organization

• Click the **Details** button for the subrecipient organization:

Subawards

Upload a pre-formatted budget document for a subawardee organization or enter details manually.

+ Add Subaward

Organization Id	File Name	Actions
Kansas State University (000054)		Details



- Enter the direct and indirect costs for the sub in **Details**, or upload a Grants.gov sub R&R budget pdf:

Subaward Details

File Name: Add
Choose File No file chosen

Organization Name: Kansas State University Form Name:

Details

Budget Period	Direct Cost	F&A Cost	Cost Sharing	Total Cost
1	15,000.00	5,000.00	0.00	20,000.00
2	15,000.00	5000	0.00	20,000.00

Save Changes No

These entries will map to the appropriate object codes in **Non-Personnel Costs** section:

Non-Personnel Costs
Add and configure non-personnel items for this budget period.

Period 1 **Period 2**

Period 1 Assign Non-Personnel...

Description	Description	Quantity	Total Base Cost	Actions
Other Direct				
Sub - charge CSU F&A	Kansas State University		20,000.00	Details

Period 1 **Period 2**

Period 2 Assign Non-Personnel...

Description	Description	Quantity	Total Base Cost	Actions
Other Direct				
Sub - charge CSU F&A	Kansas State University		5,000.00	Details
Sub - no CSU F&A charged (if MTDC)	Kansas State University		15,000.00	Details

NOTE: if using the R&R budget form, the budget period start/end dates in the form must match those of the CSU proposal. If a sub doesn't have costs in all periods of CSU's project, enter -0- for those periods in the form.



Direct data entry in Non-Personnel costs

When the organization is not yet in CSU’s Kuali Research system, subaward costs can be entered directly in the Non-Personnel section. There is a web tool to assist with how to enter costs in each period using the four available object codes.

Special considerations:

1. When a sponsor has indirect cost restrictions on subrecipients (e.g., CSU can’t calculate F&A on the subaward amount OR CSU is adding supplemental funding that includes funding for a sub who is already over the \$25K threshold for indirect costs):
 - a. Use direct data entry for each period, using the ‘Sub – no CSU F&A charged (if MTDC)’ object code
 - b. In the Details lightbox for the subaward, uncheck the indirect cost rate (MTDC or TDC)
2. When the sponsor has a different threshold for indirect costs on subs (e.g., Gates Foundation allows idc on first \$100k), and the rate type is MTDC:
 - a. Use direct data entry for each period, using the ‘Sub – charge CSU F&A’ object code up to the first \$100k
 - b. Use the ‘Sub – no CSU F&A charged (if MTDC)’ object code for amounts over \$100k.
3. When the rate type is TDC, the system calculates indirect costs on all subaward line items, regardless of the object code used.
 - a. When a sub line item should not have indirect calculated on it, use the ‘Sub – no CSU F&A charged (if MTDC)’ object code, and uncheck the rate in the Details lightbox.
 - b. Add information in the description to explain how the line item was entered/modified.

Edit Assigned Non-Personnel [Close]

test if TDC is charged

Details Cost Sharing Rates

Rates

Class	Type	Rate Cost	Rate Cost Sharing	Apply Rate?
TDC	TDC	250.00	0.00	<input type="checkbox"/>

Save Changes Save And Apply To Other Periods Sync To Period Direct Cost Limit

Sync To Period Cost Limit Cancel