



Research Subcontracts Business Process

Set up

1. The Grants Manager submits a proposal that includes an outgoing subaward in Coeus.
2. An OSP Grants Specialist receives, reviews, and submits the proposal to the sponsor.
3. When the project is funded, the department submits a contract request for the subaward and links it to the Coeus proposal in PEER.
 - Department users can check the status of the subcontract set up in the PEER Awards Management Dashboard: <https://ospupdatesblog.wordpress.com/2023/08/21/how-to-check-the-status-of-osp-post-award-requests/>
4. When the subcontract on the award is executed, OSP will create a corresponding award line and grant worktag.
 - The award line value will be equivalent to the contract amount.
 - If federal, the award line will be set up with a basis limit and have a cap on F&A.
5. Post Award Finance receives a copy of the subaward from PEER.
6. Post Award Finance reviews and puts the subaward into affect.
7. Post Award Finance creates a supplier contract to represent the full amount of the contract.
 - A supplier contract contains subcontract start and end dates and dollar amount.
 - This replaces what was a purchase order prior to Workday.
 - The supplier contract is linked to the subcontract award line.
8. An obligation is made for the full amount of the contract

Invoices

9. The subcontracted institution must send invoices to vumc.finance.invoices@vumc.org
The VUMC Contact Number (VUMCxxxxxx) must be included on each invoice.
 10. Post Award finance creates a supplier invoice against the supplier contract in Workday.
 11. The invoice routes to the Workday Grant Manager's inbox in Workday.
 12. The Workday Grant Manager obtains PI approval.
 13. The Workday Grant Manager attaches PI approval to inbox task.
 14. The Workday Grant Manager reviews and approves the invoice.
 15. The invoice automatically routes back to the Post Award Finance portfolio manager.
 - The portfolio manager certifies that the invoice meets minimum subrecipient monitoring guidelines.
 16. The invoice is routed to Accounts Payable to be paid.
 - Accounts Payable has 30 days to send payment to the sub.
 - The indirect cost rate will be included in the payment.
 17. The obligation amount of the contract is automatically reduced by the payment amount.
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Variable Situations for Invoices:

If the PI or Grant Manager do not agree with the invoice received, the Grant Manager must click “Send Back” and include a note describing what is incorrect about the invoice. Central finance will cancel the original invoice. **The grant manager must contact the sub to have a correct invoice submitted.**

If the subcontractor is brand new to VUMC, OSP will submit a supplier request to Disbursements. If the subcontractor needs to update their banking information, they can work with Vendor Maintenance in Supply Chain (vumcdsvendormaintenance@vumc.org) to update the supplier record.

If the sub sends the invoice directly to the department, the invoice must be forwarded to the central invoice inbox (vumc.finance.invoices@vumc.org) so the business process can be initiated in Workday.

If the invoice is showing as paid, and the sponsor is requesting additional detail, reach out to vumcdspayments@vumc.org for additional information.

When a grant or contract is closing, please confirm the subcontract site sends a final invoice **marked FINAL**. It is the responsibility of the research department to confirm this final invoice is PAID in a timely manner and included in the final financial report.

If subcontractor is an international site and the payment should be sent via wire, Disbursements requires:

1. The signed W-8 (no more than three years old)
2. Completed and signed Location of Services form
3. Current wire banking information , if not already included on the invoice.

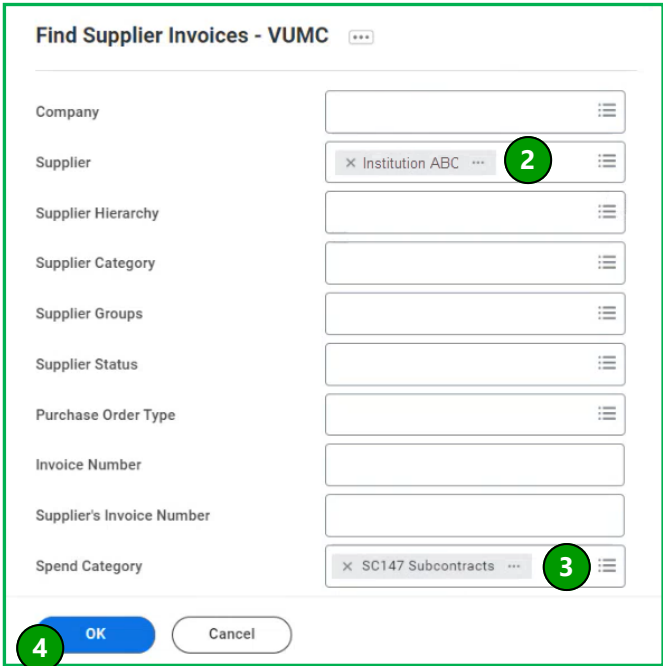
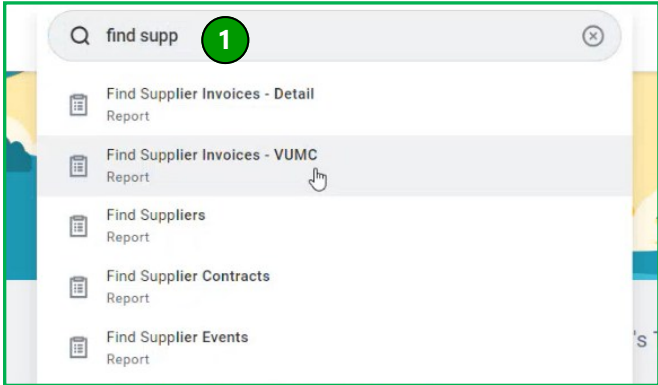
These documents can be uploaded along with the signed PI by the research department (step 14 on previous page).

For additional training, please visit the Learning Exchange for course **WDRG-122** Outgoing Subawards in Workday.



Research Subcontracts Business Process

- Check the Status of an Invoice
1. Search and select report **Find Supplier Invoices—VUMC**
 2. Enter the subrecipient as the Supplier.
 3. Enter SC147 Subcontracts as the Spend Category.
 4. Click **OK**.
 5. Check the Invoice Status column.



Find Supplier Invoices - VUMC

16 Items

Supplier Invoice	Company	Supplier	Supplier Remit	Supplier's Invoice Number	Invoice Number	Invoice Date	Due Date	Invoice Amount with Sign	Invoice Accounting Date	Invoice Status	Match Status	Payment Status
Q	Vanderbilt University Medical Center	DUKE UNIVERSITY	DUKE UNIVERSITY - Remit-To: 0001009890_108_RT	2200097566	SI-000312160	10/18/2023	11/17/2023	352.03		In Progress		Unpaid
Q	Vanderbilt University Medical Center	DUKE UNIVERSITY	DUKE UNIVERSITY - Remit-To: 0001009890_108_RT	1801054336	SI-000313181	10/17/2023	11/16/2023	3,220.00		In Progress		Unpaid
Q	Vanderbilt University Medical Center	DUKE UNIVERSITY	DUKE UNIVERSITY - Remit-To: 0001009890_108_RT	2200097433	SI-000286237	10/16/2023	11/15/2023	3,363.05		In Progress		Unpaid
Q	Vanderbilt University Medical Center	DUKE UNIVERSITY	DUKE UNIVERSITY - Remit-To: 0001009890_108_RT	2200097288	SI-000300961	10/11/2023	11/10/2023	3,765.76		In Progress		Unpaid
Q	Vanderbilt University Medical Center	DUKE UNIVERSITY	DUKE UNIVERSITY - Remit-To: 0001009890_108_RT	2200097077	SI-000300782	10/09/2023	11/08/2023	26,240.71		In Progress		Unpaid

A green circle with the number '5' is placed over the 'Invoice Status' column header.



Research Subcontracts Business Process

Check Process History of an Invoice

1. Search and select the sponsor invoice number or the supplier invoice number from the global search menu.

If the sponsor does not show, ensure you are on the VPN.

If the sponsor number still does not show, ensure your Workday search settings are set up as “Classic Workday Search” and that the preferred search category is set to “All of Workday.”

2. Select the **Process History** tab.
3. Scroll process history to see which approvals are completed and which are awaiting action.

Ship-To Address 1161 21ST AVE S., SUITE D3300 MCN Nashville, TN 37232 United States of America

On Hold No

Supplier Document Received No

Supplier's Invoice Number 0000000000

External PO Number (empty)

Referenced Invoices (empty)

Attachments 383001280 2200097566...

Invoice

UNIVERSITY

Customer Number 7000000

BILL TO: VANDERBILT UNIVERSITY MEDICAL CTR
319 WEST END AVE, STE 600
NASHVILLE, TN 37203

Invoice Number: 0000000000
Invoice Period: 08/01/2023-08/30/2023
Invoice Date: October 18, 2023
Amount Due: \$ 322.00
Date Due: November 17, 2023

PLEASE REFERENCE CUSTOMER 00000000 AND INVOICE 0000000000 ON PAYMENTS

Process History

Invoice Line	Company	Item	Supplier Contract	Spend Category	Com Code
Q	Vanderbilt University Medical Center		CON-000000: VUMC	SC147 Subcontracts	

Process History

28 Items

Process	Step	Status	Completed	Due Date
Supplier Invoice Event	Integration: INT042 IS Supplier Invoice Remit-to Connection SI Boomerang	Not Required	11/16/24 PM	
Supplier Invoice Event	Approval by System CFO, System COO, or System Deputy CEO	Not Required		
Supplier Invoice Event	Approval by System CFO, System COO, or System Deputy CEO	Not Required		
Supplier Invoice Event	Approval by System CFO, System COO, or System Deputy CEO	Not Required		
Supplier Invoice Event	Approval by Tax Manager	Not Required		
Supplier Invoice Event	Approval by Tax Manager	Not Required		
Supplier Invoice Event	Review Supplier Invoice	Awaiting Action		11/09/24