Research Subcontracts Business Process

Set up

1. An Office of Sponsored Programs (OPS) 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.

9. An obligation is made for the full amount of the contract

Invoices

10. The subcontracted institution must send invoices to vumc.finance.invoices@vumc.org

11. Post Award finance creates a supplier invoice against the supplier contract in Workday.

12. The invoice routes to the Workday Grant Manager's inbox in Workday.

13. The Workday Grant Manager obtains PI approval.

14. The Workday Grant Manager attaches PI approval to inbox task.

15. The Workday Grant Manager reviews and approves the invoice.

16. The invoice automatically routes back to the Post Award Finance portfolio manager.

   - The portfolio manager certifies that the invoice meets minimum subrecipient monitoring guidelines.

10. 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.

19. The obligation amount of the contract is automatically reduced by the payment amount.

Research Subcontracts Business Process

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 sub is a new supplier to VUMC, OSP will have to submit a supplier request to post award finance. This step may delay your invoice.
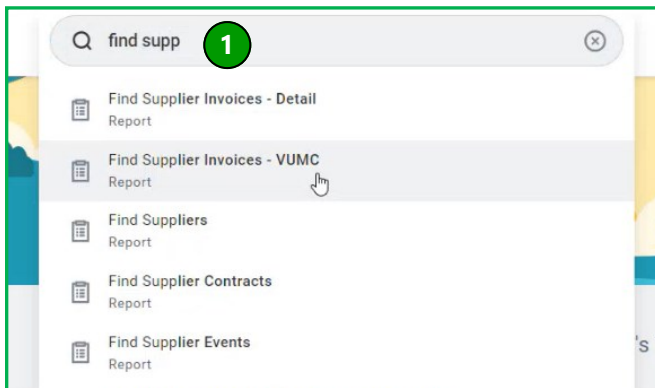
If the sub sends the invoice directly to the department, the invoice must be forward to the central invoice inbox so the business process can be initiated in Workday.

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 SC146 Subcontracts as the Spend Category.

4. Click **OK**.

5. Check the Invoice Status column.

Find Supplier Invoices - VUMC ...

Company	
Supplier	✕ Institution ABC ...
Supplier Hierarchy	
Supplier Category	
Supplier Groups	
Supplier Status	
Purchase Order Type	
Invoice Number	
Supplier's Invoice Number	
Spend Category	✕ SC147 Subcontracts ...

OK   Cancel

find supp

Find Supplier Invoices - Detail
Report

Find Supplier Invoices - VUMC
Report

Find Suppliers
Report

Find Supplier Contracts
Report

Find Supplier Events
Report

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
🔍	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
🔍	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
🔍	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
🔍	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
🔍	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

Research Subcontracts Business Process

Check Process History of an Invoice

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

2. Select the **Process History** tab

3. Scroll process history to see which approvals are completed and which are awaiting action.