

## Requesting an Outgoing Subaward – Quick Guide

- 1 Anyone with access to the Award can request an outgoing subaward. Navigate to the Grants module, Awards page. Use the Filter by search options to find the Award. Open the Award.
- 2 For Awards converted from legacy ResearchUVA, on the Award Workspace, click on the Manage Access activity. Add the Admin Contact. Confirm the correct individuals are listed with edit rights and read only rights. Otherwise skip to **Step 4**.
- 3 Add any individuals necessary by searching for the individual. Click the three dots for additional search filters.
- 4 On the Award Workspace, select the Create Agreement activity in the left navigation pane.
- 5 In the Create Agreement pop up window, select Outgoing Subaward from the dropdown and click OK. The pop up will disappear and you will be returned to your Award Workspace.
- 6 On the Award Workspace, navigate to the Related Projects tab. You may need to click the ellipsis (...) to find the tab.
- 7 Click on the ID of your subaward. If there are multiple related projects, check the Modified Date. Outgoing subawards will start with SUB in the ID.
- 8 If you have not logged in to the Agreements module yet, clicking the Sub ID may take you back to your Dashboard. Use the Recently Viewed navigation pane to return to your Award and repeat Steps 6 and 7.
- 9 Clicking on the ID of your outgoing subaward will take you to the Agreements Workspace. Click Edit Agreement and follow the instructions on page 2 for completing the Outgoing Subaward Request.

*Note: If you are unable to access your Awards, reach out to [ruva-huron-help@virginia.edu](mailto:ruva-huron-help@virginia.edu).*



# Subaward Request Part 2 – Quick Guide

The screenshot displays the 'Agreement Upload' section of the SmartForm. The sidebar on the left is highlighted with a red box and a '1' callout. The main workspace shows the 'Agreement Upload' details for SUB00000156, including the Agreement manager/Principal investigator (Jason Lyman) and Administrative contact (Christina Bousquet). A 'Pre-Submission' pop-up window is overlaid on the workspace, showing details for 'Subaward to Mayo' and a flow diagram with 'Pre-Submission', 'Unassigned', and 'Clarification Requested' steps. The 'Pre-Submission' window has a 'Submit' button (callout 3) and a 'Manage Ancillary Reviews' button (callout 2). Below the 'Pre-Submission' window, there are buttons for 'Edit Agreement', 'Printer Version', and 'View All Correspondence'. At the bottom of the 'Pre-Submission' window, there are buttons for 'Submit', 'Manage Ancillary Reviews', 'Manage Access', and 'Email Agreement'.

- 1 Complete the SmartForm by filling out all required fields. *See chart.*
- 2 On the Agreement Workspace, click Manage Ancillary Reviews to add the UVA PI and your Dept/School required approvers.
- 3 Click Submit on the Agreement Workspace after all Ancillary Reviews are complete.

*Next Steps: OSP will assign to a member of Pre-Award for processing.*

Completing the Outgoing Subaward Agreement SmartForm			
Page	Q#	Tip	
Agreement Upload	1	PI: Confirm PI name matches Funding Proposal (FP).	
	2	Admin Contact: Defaults to your name. Change to FP Admin Contact.	
	3	Agreement: Check first draft to be generated internally.	
	4	Title: Edit to include "Subaward to [Subrecipient]" before the Award short title.	
	5	Type: No change needed – Outgoing Subaward.	
	6	Description: Provide a description of your request.	
	7	Supporting Docs: Upload documents needed for the subaward – Subrecipient scope of work, budget, justification, Commitment Form, etc.	
	8	Goods/Services: Mark No, this is not applicable to this agreement type.	
General Info	1	Counterparty: Enter the name of the Subrecipient. Use the wildcard % to assist with searching.	
	2-4	Contact Info: Enter the contact info if known. Otherwise put TBD. These are required fields.	
	5	Dept: Confirm the department matches the FP.	
	6	Collaborators: Add anyone listed on the FP with edit rights.	
	7	Additional counterparties: Not needed. Skip.	
	8	Address: Add the address for Subrecipient in Q1, if known.	
	Sub Agreement Info	1-16	Complete fields 1-16. The remaining questions will be completed by OSP. These questions directly relate to your subaward request.
	Subaward Regulatory Compliance	1 - 3	Complete fields 1-3. These relate to whether the Subrecipient is using Human Subjects, Animals or HS Data. Include any related approval documents.
Sub Amendment Info	1-3	Complete fields 1-3 only if you are requesting an Amendment to a previously executed Subaward. This includes Subawards that were started in the legacy ResearchUVA system and now in ResearchUVA PBH.	