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General ASTRA Resources: https://goo.gl/ximrW3
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See page A3-7 for more information on roles and access.

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START A NEW SUBAWARD

1. Log in to SAGE: sage.washington.edu

NOTE: You will only be able to create a subaward if you have first been assigned the Subaward Preparer role in ASTRA by your departmental ASTRA Authorizer. See page A3 for more on ASTRA Roles.

2. Select Subawards
3. Select Create New Subaward

4. Select Look Up eGC1 to find the eGC1 the subaward is associated with
SEARCH FOR AN eGC1

5. Select **one of the following** from the dropdown:
   - eGC1 Number
   - PI Name (last, first)
   - Short Title

6. Type all or part of the **(a) search term** and select **(b) Search**

7. Select the eGC1 **Number**; the value will populate on your request form
SELECT A SUBRECIPIENT

8. Select Look Up Subrecipient

9. Type all or part of the **(a) subrecipient name** and select **(b) Search**

10. Select **Subrecipient Name**; the value will populate on your request form

**SEARCH RESULTS:** Results display and are limited to 25. Refine your search if you do not see the item you are looking for.

**NO RESULT?**

**SUBRECIPIENT NOT FOUND:** If you cannot find the subrecipient you are looking for, please do the following:

**EMAIL:** ospsubs@uw.edu  **SUBJECT:** New Subrecipient

**CONTENT:** New Subrecipient information
SELECT A FUNDING ACTION

11. Select Look Up Funding Action

SEARCH RESULTS: Only Funding Actions associated with the selected eGC1 will display.

12. Select FA Number; the value will populate on your request form

FA DATES: These dates are determined by the FA period dates, which populate the FA Start Date and FA End Date fields.

13. The Request Start Date, Request End Date and Request Amount fields will become editable once you select an FA. You must enter values for these fields before submitting the request.

NO FA?

IT’S REQUIRED: If an Approved eGC1 does not yet have an FA, you can continue drafting your subaward but you’ll not be allowed to submit it to OSP until one is selected.
### FILL IN ADDITIONAL FIELDS

14. Follow the chart below and **complete each field**

<table>
<thead>
<tr>
<th>Item</th>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Request Start Date &amp; End Date</td>
<td>*Required for submission.</td>
</tr>
<tr>
<td>B</td>
<td>Request Amount</td>
<td>This amount must be greater than zero, but not greater than the Funding Action amount. *Required for submission.</td>
</tr>
</tbody>
</table>
| C    | Do you anticipate a multi-year subaward? | If answer Yes, two additional fields will display:  
  - Estimated Project End Date  
  - Estimated Project Amount  
  *Required for submission. |
| D    | If allowed by the prime award, is automatic carry forward authorized by the PI? | Select Yes, No, or Not Applicable/Not Allowed. *Required for submission. |
| E    | Purchase Order Number (CR/BPO) | Enter just the number located in Ariba. *Required for submission. |
| F    | Special Terms or Instructions for OSP | Enter any additional information. |

**CR/BPO NUMBER:** This information is located in Ariba. Enter the digits only from your CR or BPO number here.
ADD ATTACHMENTS

15. Select Add Attachment to upload required attachment(s)

**REQUIRED ATTACHMENTS:**
Find a complete listing of required documents on OSP's subaward page: http://goo.gl/YExFBo

16. Type description, choose the file, then select Upload

17. Optional: Update or Delete existing attachments

**MUTLIPLE ATTACHMENTS:**
Select Add Attachment to upload additional items.

**VERSION UPDATES:** If there is more than one version of an attachment, only the most recent can be updated or deleted.
ENTER CONTACTS

18. Enter **contact information** for Subrecipient PI (required) and Contact

*Phone Number is optional*

**Subrecipient Contacts**

- **Subrecipient PI Name**: Bonnie Jones
- **Subrecipient PI Email**: bjones@abc.edu
- **Subrecipient PI Phone**: 215.555.1234

**Subrecipient Contact**

- **Name**: John Smith
- **Subrecipient Contact Email**: jsmith@abc.edu
- **Subrecipient Contact Notes**: You may also add information for a Subrecipient Contact.

**UW Contacts**

- **UW PI Name**: [Redacted]
- **UW PI Email**: [Redacted]@uw.edu
- **UW PI Phone**: [Redacted] +1 206

**Subaward Preparer**

- **Name**: [Redacted]
- **Subaward Preparer Email**: [Redacted]@uw.edu
- **Subaward Preparer Phone**: [Redacted] +1 206

**AUTO-FILL**: With previous selections, these fields will pre-populate. Simply select “Change Principal Investigator” or “Change Subaward Preparer” to update.
SELECT A FINANCIAL CONTACT

20. Select **Look Up Financial Contact** (required)

21. Select **one of the following** from the dropdown:
   
   - Name (Last, First)
   - UW NetID

22. Choose how to search, type all or part of **(a) search term** and select **(b) Search**

**SEARCH RESULTS:** Results display and are limited. Refine your search if you do not see the item you are looking for.
SUBMIT YOUR SUBAWARD

23. Check **required fields are complete**

- eGC1 *
- Subrecipient *
- Funding Action *
- Request Start & End Date *
- Request Amount *
- ...multi year subaward? Yes/No *
- ...automatic carry...? Yes/No *
- Purchase Order Number (CR/BPO) *
- Attachment (1 minimum) *
- UW PI Email & Phone *
- Subaward Preparer Email & Phone *
- UW Financial Contact *
- Subrecipient PI Name & Email *

**RED ASTERISKS:** All required fields are indicated by a red asterisk.

24. Select **(a) Option A** or **(b) Option B** that represents subaward submission status

**OPTION A: NOT READY**

Select **Save Draft and Close**. You will be taken to My Subawards Tasklist. To return to your subaward to continue editing, use the tasklist or search (See page A1 and A2.)

**OPTION B: READY**

Select **Submit**; the window will refresh and confirm submission at the top of the page. **Proceed to Step 25**

**IMPORTANT:** Once you submit, the subaward will NO LONGER be editable and will display as "Read Only". To make changes, the Subaward must be in composing, withdrawn or returned status.
As a subaward is processed, it is given a status in the following order:

1. In OSP - Submitted to OSP for review; it will be assigned to Subaward Intake initially
2. OSP Assigned - Assigned to an OSP staff member for review.
3. Issued - Issued to the Subrecipient.
4. Active - Fully Executed (FE) subaward.

**ACTIVE STATUS:** Once a subaward displays “Active” status, a Subaward Modification can be requested.
CANCEL REQUEST

27. To cancel your request, find the Request in Process section on the overview page, then select (a) Cancel Request.

(b) A confirmation message will appear. Select Yes to cancel the subaward.

WITHDRAW REQUEST

28. To withdraw your request, find the Request in Process section, then select (a) Withdraw.

(b) A confirmation message will appear. Select Ok to withdraw the subaward.
DETAILS PAGE

29. To view the details page, (a) select the request number from the subaward overview page.

From the details page, you can view details of your subaward request, (b) view subaward request status, attachments and (c) view history of the request and comments. If the request has been withdrawn or returned, you can make changes to the request, (d) Save and Close or Resubmit.

From this page, you can also (e) Withdraw or Cancel a request in In OSP status.

RESUBMIT SUBAWARD

30. To resubmit a subaward that has been withdrawn or returned, go to the details page, then select Resubmit at the bottom of the page. If you are resubmitting a returned request, you will be required to enter a comment.
SUBAWARD MODIFICATION

If there is no request in process and the subaward is in Active, Expired or Closed Out status, the **Create Modification Request** button will appear on the overview page in the Request in Process section, and you will be able to request a modification.

31. On My Subawards task list, select (a) **Subaward Number in “Active” status**

On the Subawards Overview page, select (b) **Create Modification Request**.

32. Select the eGC1 **Number**; the value will populate on your request form.
33. Select **Look Up Funding Action**
Follow Steps 11 & 12 on how to select

34. Type the **Purchase Order Number (CR/BPO)**

**SEARCH RESULTS:** Only Funding Actions associated with the selected eGC1 will display.

35. Select **Modification Type(s).** Select all types that apply. At least one type is required. Follow the chart below to help complete Modification Type(s).

<table>
<thead>
<tr>
<th>Modification Type</th>
<th>Request Description</th>
<th>Data Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extension**</td>
<td>For a new Subaward End Date which extends the current project period</td>
<td>New Request End Date</td>
</tr>
<tr>
<td>Early Termination**</td>
<td>For a new Subaward End Date which shortens the project period</td>
<td>New Request End Date</td>
</tr>
<tr>
<td>Funding Change</td>
<td>For a decrease (Deobligation) or increase (Supplement) to the subaward’s funding.</td>
<td>• Funding Change Type: Deobligation or Supplement</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Funding Change Amount</td>
</tr>
<tr>
<td></td>
<td>Enter a negative Funding Change Amount for a Deobligation</td>
<td></td>
</tr>
<tr>
<td>Scope Change</td>
<td>For a change in the Scope of Work (SoW)</td>
<td>An attachment that includes background info/ objectives and work to be performed</td>
</tr>
<tr>
<td>Other Modification</td>
<td>For other changes</td>
<td>Special Terms or Instructions for OSP</td>
</tr>
</tbody>
</table>

**SAGE will not allow the selection of both an Extension and an Early Termination on a modification.**
36. Optional: **Upload Attachment(s)** for a Scope Change modification. Follow Steps 15 & 16 on how to upload

37. Check **required fields are complete**

- eGC1*
- Funding Action*
- Purchase Order Number (CR/BPO)*
- Attachments* (Only if Scope Change is selected)

38. Select (a) **Option A** or (b) **Option B** that represents the modification request

**OPTION A: NOT READY**
Select **Save Draft and Close**

**OPTION B: READY**
Select **Submit**; the window will refresh and confirm submission.
APPENDIX

MY SUBAWARDS – TASKLIST

The My Subawards page displays all of the subawards to which you have edit access.

The items are listed in order by Subaward Number, with the newest one first.

<table>
<thead>
<tr>
<th>Subaward Number</th>
<th>Subrecipient Name</th>
<th>Latest Request Status</th>
<th>Subaward Status</th>
<th>Subaward Start Date</th>
<th>Subaward End Date</th>
<th>Total Subaward Amount</th>
<th>UW PI</th>
<th>Latest BPO Number</th>
<th>FA Org Code</th>
<th>eGC1 Number</th>
<th>eGC1 Short Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>SC</td>
<td>University of Cambridge</td>
<td>Composing</td>
<td>Active</td>
<td>5/6/2016</td>
<td>5/4/2017</td>
<td>$254,914.00</td>
<td>E016</td>
<td>0040122560</td>
<td>A</td>
<td>GSK Phase II</td>
<td></td>
</tr>
<tr>
<td>SC</td>
<td>University College London</td>
<td>Composing</td>
<td>Active</td>
<td>5/6/2016</td>
<td>5/4/2017</td>
<td>$200,734.00</td>
<td>E017</td>
<td>0040122560</td>
<td>A</td>
<td>GSK Phase II</td>
<td></td>
</tr>
<tr>
<td>SC</td>
<td>Virginia Polytechnic Institute and State University</td>
<td>In OSP</td>
<td>Active</td>
<td>6/1/2013</td>
<td>5/31/2017</td>
<td>$60,426.00</td>
<td>E0081</td>
<td>0040022870</td>
<td>A</td>
<td>A/R Resp R01</td>
<td></td>
</tr>
</tbody>
</table>

ACCESS: SEARCH & VIEW

If you are named in one or more of the following roles on an eGC1 associated with the subaward, you will be able to search for, open and view details of the subaward:

- Administrative Contact, Pre-Award Budget Contact or eGC1 Preparer
- Assigned Read-Write or Read-Only access to the eGC1 or the subaward

ACCESS: TASKLIST & EDIT

If you are named as Subaward Preparer, UW PI or Financial Contact on the subaward or have been granted Read-Write Access to the subaward, a subaward will display in your tasklist, and you will be able to view and edit the subaward.
To search for a subaward, options are available:

**A1 - SEARCH**
Type all or part of the item you wish to search for within the following columns:
- Subaward Number
- Subrecipient Name
- Dates (MM/DD/YYYY)
- Total Subaward Amount
- UW PI
- BPO Number
- FA Org Code
- eGC1 Number
- eGC1 Short Title

From the dropdown choose “My Subawards” or “All Subawards,” then select Search.

**A2 - FILTER REQUEST STATUSES**
Select a filter checkbox(es)
- Composing
- In OSP
- OSP Assigned
- Withdrawn
- Returned
- Issued

**A3 - FILTER SUBAWARD STATUSES**
Select a filter checkbox(es)
- Active
- Expired
- Closed Out
- Canceled

**A4 - REORDER**
Select a column heading to reorder your tasklist alphabetically or numerically.
- Blank, A to Z
- Blank, Oldest to Newest
- Blank, Smallest to Largest

**SUBAWARD NUMBER:** The Subaward Number may not be clickable depending on your permissions.
SUBAWARD ROLES

To create and submit subaward and subaward modification requests, you will need the Subaward Preparer ASTRA role.

This role is NOT limited by Organization Code.

REQUEST A SUBAWARD PREPARER ROLE

When requesting this role from your local ASTRA Administrator, request the following:

A5: Application - SAGE
A6: Role - Subaward Preparer
A7: Action - Read-Write
A8: ASTRA Role - User

In addition to the Subaward Preparer, those with access to an eGC1 associated with one of the subaward’s requests have the ability to perform the following subaward actions.

<table>
<thead>
<tr>
<th>Campus Role or Access Type</th>
<th>Create New Subaward or Modification</th>
<th>Edit in Composing, Withdrawn or Returned Status</th>
<th>Edit Contact Info (from Overview Page)</th>
<th>Edit Manage Access List</th>
<th>Open Subaward &amp; View Request Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASTRA Role SAGE Subaward Preparer</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td>SAGE Role Subaward Contact (PI, Preparer, Financial) Create Only Modifications</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td>SAGE Role Assigned Read-Write Create Only Modifications</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td>SAGE Role Assigned Read-Only Create Only Modifications</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td>Any SAGE Role on associated eGC1s</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
</tr>
</tbody>
</table>
SUBAWARD MANAGE ACCESS

The Manage Access page allows you to see who has access to the subaward. If you are named as a contact on the subaward, you can use the Manage Access page to grant additional users either Read-Write or Read-Only access.

A9a. From a request in Composing status, you can open the Manage Access page by navigating to the Subaward Request Details section and selecting the Manage Access button.

A9b. From a request in a status other than composing, you can open the Manage Access page by navigating to the Subaward Overview page and selecting the Manage Access button.
SUBAWARD MANAGED & RELATED EGC1 ACCESS

SUBAWARD MANAGED ACCESS

A10. The **Subaward Managed Access** section allows you to view owners of the subaward and grant access to additional users to view or edit (see A12, next page).

![Subaward Managed Access Diagram]

RELATED eGC1 ACCESS

A11. The **Related eGC1 Access** section shows people who have access to the subaward because they have access to an eGC1 associated with one of the subaward’s requests.

If your subaward access is through an eGC1, the subaward will not appear on your tasklist. You can only search for it and then view it.
A12. To grant someone access to your subaward, select the **Add Another User** link to display the personnel chooser.

A13. Enter the name of the person you would like to add in the **Search For** box, then select **Search**. You can search by name or UW NetID using the drop-down options to the right of the search box.

A14. Select the name of the person from the list of results that appears below the search box. The page will refresh and display the added person with Read-Only access permission by default.
A15. You can use the drop-down menu to change the permission to **Read/Write**.

Read-Write access allows the person to edit the subaward. Only subawards that someone has Read-Write access for will appear on their tasklist.

Someone with Read-Only access can view the subaward, but not edit it. They can search for and then view any subaward for which they have Read-Only access.

A16. To remove a person with assigned access, select the **trash can icon**. The system will not prompt you to confirm the deletion.
RESOURCES

The following resources help provide information for the SAGE product, subaward process and application status. Use the Research Administration Data (RAD) to generate reports for departments.

About Subawards
{http://www.washington.edu/research/index.php?page=subawards}

Check Subaward Status
{https://myresearch.washington.edu/}

Subawards Workflow Chart

Subawards User Guide
{http://www.washington.edu/research/tools/sage/guide/subawards}

Research Administration Data (RAD)
{http://www.washington.edu/research/rad/}

Support:

<table>
<thead>
<tr>
<th>Support</th>
<th>Office Hours: Mon-Fri</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product: SAGE Subawards</td>
<td>(206) 685-8335 <a href="mailto:sagehelp@uw.edu">sagehelp@uw.edu</a></td>
</tr>
<tr>
<td>Policy: Subawards</td>
<td>(206) 543-4043 <a href="mailto:ospsubs@uw.edu">ospsubs@uw.edu</a></td>
</tr>
<tr>
<td>Procurement: Ariba</td>
<td>(206) 543-4500 <a href="mailto:pcshelp@uw.edu">pcshelp@uw.edu</a></td>
</tr>
</tbody>
</table>
OTHER QUESTIONS

SAGE SUBAWARDS:
sagehelp@uw.edu
(206) 685-8335

SUBAWARD AGREEMENT OR MODIFICATIONS:
ospsubs@uw.edu
(206) 543-4043

PROCUREMENT SERVICES/ARIBA:
pcshelp@uw.edu

ABOUT THIS QUICK GUIDE:
orislearn@uw.edu