

OFFICE OF RESEARCH INFORMATION SERVICES  
UNIVERSITY *of* WASHINGTON



# OUTGOING SUBAWARDS

QUICK GUIDE

# GETTING STARTED

## WHAT ARE SUBAWARDS...

A subaward is a formal legal agreement between the UW and another organization. There are two types:

**OUTGOING SUBAWARD:** UW portions some work to another institution.

**INCOMING SUBAWARD:** Awarded institution portions some work to UW.

## WHO IS A SUBRECIPIENT...

When UW portions work out to another institution, that institution is referred to as the subrecipient.

If another awarded institution were to portion work to UW, UW would become their subrecipient.

## IN THIS QUICK GUIDE...

The guide will ONLY cover the Outgoing Subaward process and subaward modifications in SAGE.

When reference is made to the subrecipient, this refers ONLY to another institution that is not UW.

## ACCESS WITH ASTRA...

In order to access SAGE, permission must be given via **ASTRA** (Access to Systems, Tools, Resources, and Applications).

**GET ACCESS:** Ask your local ASTRA administrator to authorize the appropriate SAGE ASTRA Roles for you.

If you try to log in to SAGE without an authorized role, SAGE will display a list of your authorizers.

General ASTRA Resources: <https://goo.gl/ximrW3>

ASTRA - Who can authorize me: <http://bit.ly/1YcXxyS>

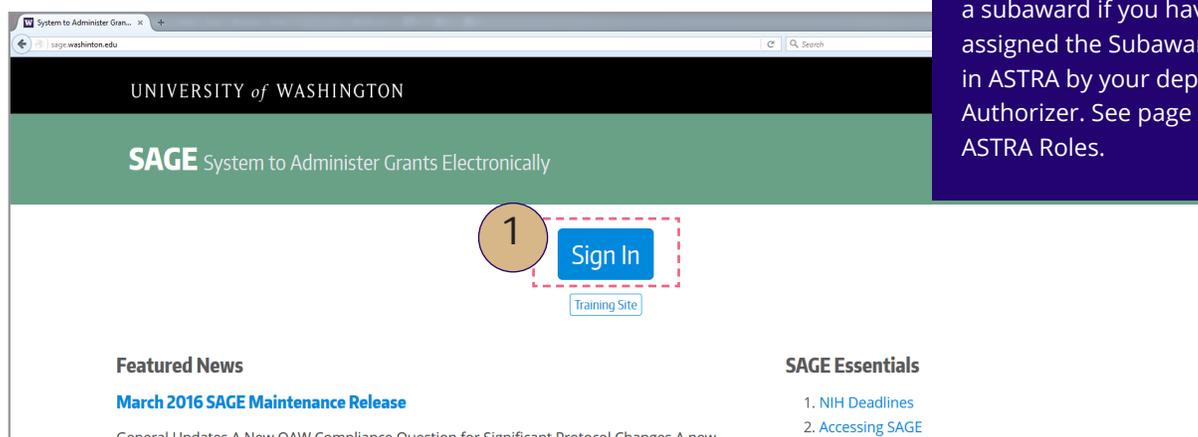
See page A3-7 for more information on roles and access.

# TABLE OF CONTENTS

<b>START A NEW SUBAWARD</b>	3
<b>SEARCH FOR AN eGC1</b>	4
<b>SELECT A SUBRECIPIENT</b>	5
<b>SELECT A FUNDING ACTION</b>	6
<b>FILL IN ADDITIONAL FIELDS</b>	7
<b>ADD ATTACHMENTS</b>	8
<b>ENTER CONTACTS</b>	9
<b>SELECT A FINANCIAL CONTACT</b>	10
<b>SUBMIT YOUR SUBAWARD</b>	11-12
<b>CANCEL REQUEST</b>	13
<b>WITHDRAW REQUEST</b>	13
<b>DETAILS PAGE</b>	14
<b>RESUBMIT SUBAWARD</b>	14
<b>SUBAWARD MODIFICATION</b>	15-17
<b>APPENDIX</b>	
<b>MY SUBAWARDS - TASKLIST</b>	A1
<b>SEARCH FOR SUBAWARDS</b>	A2
<b>SUBAWARD ROLES</b>	A3
<b>SUBAWARD MANAGE ACCESS</b>	A4-A7
<b>RESOURCES</b>	A8

# START A NEW SUBAWARD

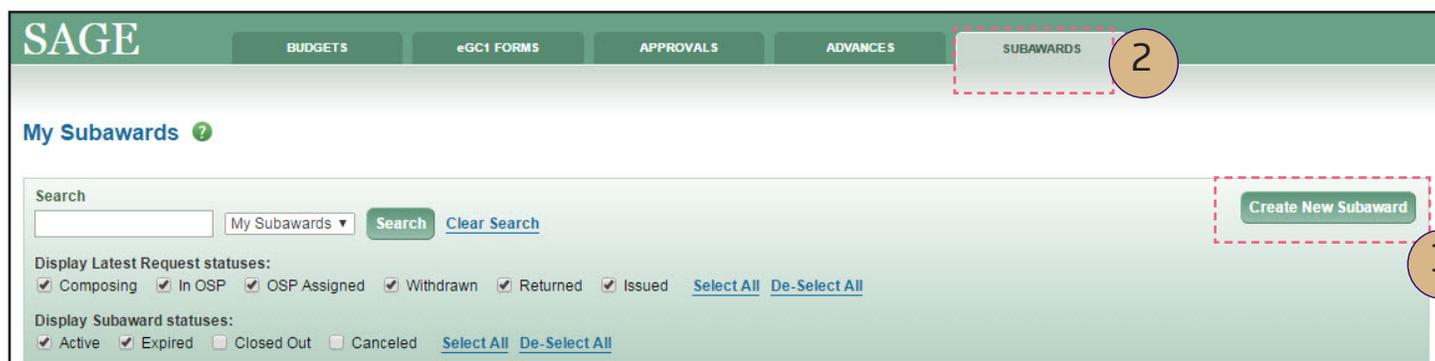
1. Log in to **SAGE**: sage.washington.edu



**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

**Choose eGC1** ✕

Only eGC1s in the same competitive segment (cycle) as your original subaward request will display. Not seeing the eGC1 you expect? Contact OSP.

Search for:

by 5 eGC1 Number Search Cancel

eGC1 Number  
PI Name (Last , First)  
Short Title

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

Search for:

6a  by eGC1 Number 6b Search Cancel

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

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

Number	PI Name	Short Title	Sponsor Name
<span>7</span> <span>A155555</span>	Alice Smith	ABC: CASCADE	ABC Company, Inc.

## SELECT A SUBRECIPIENT

8. Select **Look Up Subrecipient**

New Subaward Request ?

eGC1\*  [Change eGC1](#)

Project Title

Project Short Title

Subrecipient\*  8 [Look Up Subrecipient](#)

Funding Action\*  [Look Up Funding Action](#)

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

Choose Subrecipient ×

Search for subrecipient by name or type:

9a [Search](#) 9b [Cancel](#)

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

Subrecipients Name	Subrecipients Type
<a href="#">Greater Lakes Mental Health</a>	Non-Profit
<a href="#">Lake Stevens School District</a>	K-12 Education

**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**

**New Subaward Request** ?

eGC1\*  [Change eGC1](#)

Project Title

Project Short Title

Subrecipient\*  [Change Subrecipient](#)

Funding Action\* **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

Choose the appropriate funding action for this subaward or modification.

FA Num	Current Period Start Date	Current Period End Date	Current Amount
FA130815	03-02-2016	05-04-2017	\$33,722.00

Funding Action\* FA130815 [Change Funding Action](#)

FA Start Date 3/2/2016

FA End Date 5/4/2017

FA Amount \$33,722.00

Request Start Date\* 1/1/2017

Request End Date\* 5/4/2017

Request Amount\* \$5,000.00

**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**

The screenshot shows a web form with the following fields and annotations:

- eGC1\*** A  [Change eGC1](#)
- Project Title**
- Project Short Title**
- Subrecipient\***  [Look Up Subrecipient](#)
- Funding Action\*** FA  [Change Funding Action](#)
- FA Start Date**
- FA End Date**
- FA Amount**
- A** **Request Start Date\***  e.g. 2/14/2017
- B** **Request End Date\***  e.g. 2/14/2017
- C** **Request Amount\***
- C** **Do you anticipate a multi-year subaward?\***  Yes  No
- D** **If allowed by the prime award, is automatic carry forward authorized by the PI?\***  Yes  No  Not Applicable/Not Allowed
- E** **Purchase Order Number\*** CR/BPO  Numbers only
- F** **Special Terms or Instructions For OSP**

**14** is circled in the top left corner of the form area.

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

Item:	Field	Description
(A)	<b>Request Start Date &amp; End Date</b>	<b>*Required for submission.</b>
(B)	<b>Request Amount</b>	This amount must be greater than zero, but not greater than the Funding Action amount. <b>*Required for submission.</b>
(C)	<b>Do you anticipate a multi-year subaward?</b>	If answer <b>Yes</b> , two additional fields will display <ul style="list-style-type: none"> <li>Estimated Project End Date</li> <li>Estimated Project Amount</li> </ul> <b>*Required for submission.</b>
(D)	<b>If allowed by the prime award, is automatic carry forward authorized by the PI?</b>	Select Yes, No, or Not Applicable/Not Allowed. <b>*Required for submission.</b>
(E)	<b>Purchase Order Number (CR/BPO)</b>	Enter just the number located in Ariba. <b>*Required for submission.</b>
(F)	<b>Special Terms or Instructions for OSP</b>	Enter any additional information.

## ADD ATTACHMENTS

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

**Attachments\*** ?

No attachments have been associated

**15**

[Add Attachment](#)

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

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

**Upload Attachment** x

**Description\*** Attachment Sample 1 **16**

**File** Choose File attachment-sample-1.pdf

Upload Cancel

17. *Optional:* **Update** or **Delete** existing attachments

**Attachments\*** ?

Description	File Name	Version	File Type	Attached On	
<a href="#">Attachment Sample 1</a>	attachment-sample-1.pdf	1	Department Attachment	4/21/2016 9:12:00 AM	<a href="#">Update Delete</a>

**17**

[Add Attachment](#)

**MULTIPLE 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.

Description	File Name	Version	File Type	Attached On	
▼ <a href="#">Attachment Sample 1</a>	attachment-sample-1.pdf	2	Department Attachment	4/21/2016 10:32:04 AM	<a href="#">Update Delete</a>
<a href="#">Attachment Sample 1</a>	attachment-sample-1.pdf	1	Department Attachment	4/21/2016 9:12:00 AM	

## ENTER CONTACTS

18. Enter **contact information** for Subrecipient PI (required) and Contact  
*Phone Number is optional*

### Subrecipient Contacts

<b>Subrecipient PI Name*</b>	Bonnie Jones
<b>Subrecipient PI Email*</b>	bjones@abc.edu
<b>Subrecipient PI Phone</b>	215.555.1234
<b>Subrecipient Contact Name</b>	
	John Smith
<b>Subrecipient Contact Email</b>	jsmith@abc.edu
<b>Subrecipient Contact Notes</b>	

**SUBRECIPIENT CONTACT:**  
 You may also add information for a Subrecipient Contact. Include any other contact information in the Notes field.

19. Enter **UW PI** and **Subaward Preparer** information (required)

### UW Contacts

<b>UW PI Name</b>	[Redacted] (EIN: [Redacted])
<b>UW PI Email*</b>	[Redacted]@uw.edu
<b>UW PI Phone*</b>	+1 206 [Redacted]
	<a href="#">Change Principal Investigator?</a>
<b>Subaward Preparer Name</b>	
	[Redacted] (EIN: [Redacted])
<b>Subaward Preparer Email*</b>	[Redacted]@uw.edu
<b>Subaward Preparer Phone*</b>	+1 206 [Redacted]
	<a href="#">Change Subaward Preparer?</a>

**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)

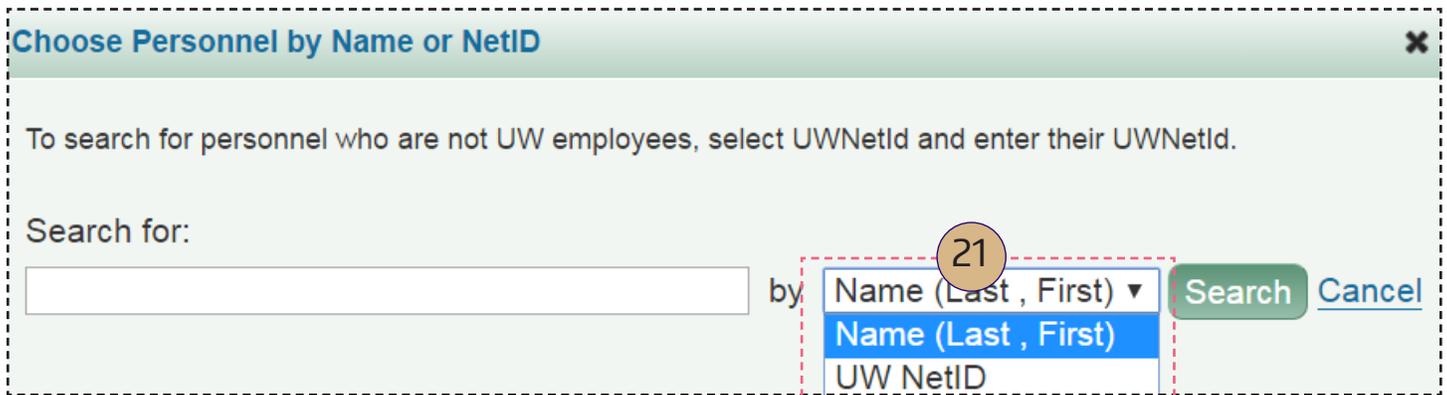


UW Financial Contact\* **Look Up Financial Contact**

**FINANCIAL CONTACT:** The Financial Contact is the invoice and Ariba procurement related point-of-contact. The Subaward Preparer and the Financial Contact can be the same person.

21. Select **one of the following** from the dropdown:

- Name (Last, First)
- UW NetID



Choose Personnel by Name or NetID

To search for personnel who are not UW employees, select UWNtId and enter their UWNtId.

Search for:

by **Name (Last, First)**

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



Search for: **Smith, Clyde** by **Name (Last, First)**

**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\*

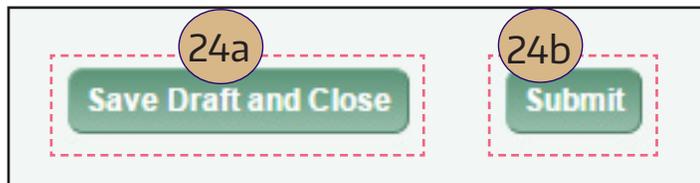


**RED ASTERISKS:** All required fields are indicated by a red asterisk.

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.)

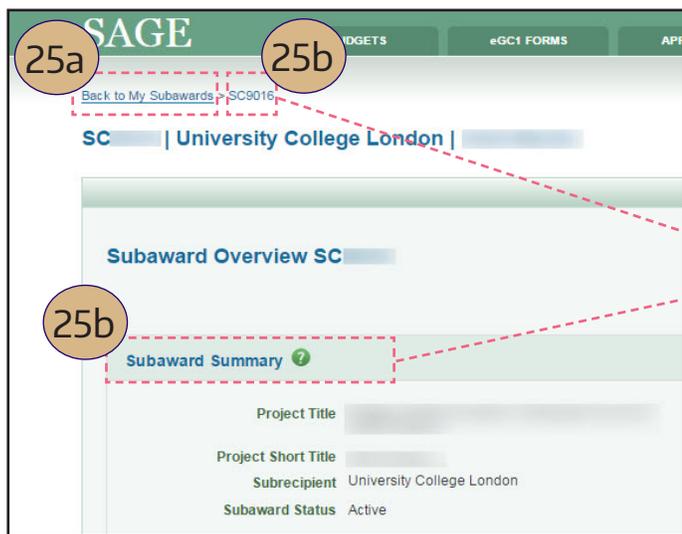


### OPTION B: READY

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.

25. After you submit, you can **(a) return to My Subawards Tasklist, (b) display the Subaward Overview page, or withdraw or cancel** your request (see 27 & 28, next page).



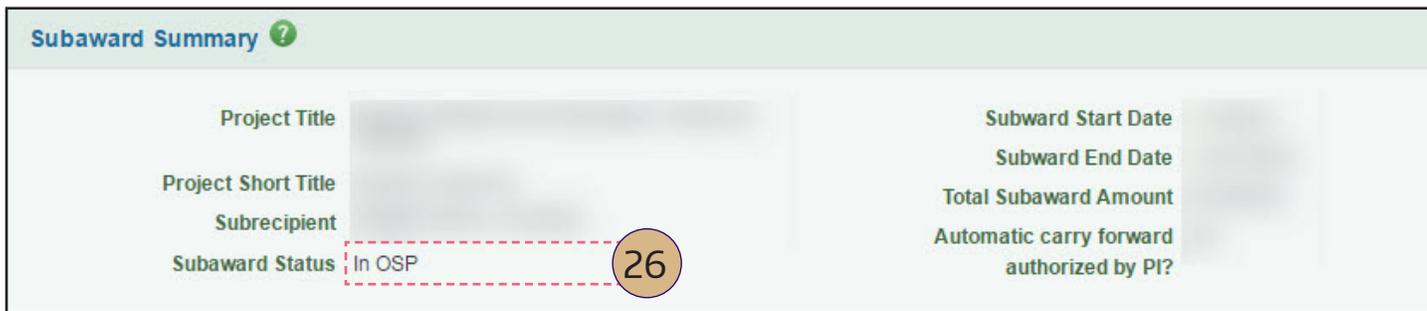
**(a)** Select **Back to My Subawards Tasklist**

**TASKLIST:** Displays a screen with all current subawards.

**(b)** Select the SC number to open the **Subaward Summary** section

**OVERVIEW:** Displays your just submitted subaward in "Read-Only" view.

26. Note the **Subaward Status** in the **Subaward Summary** section



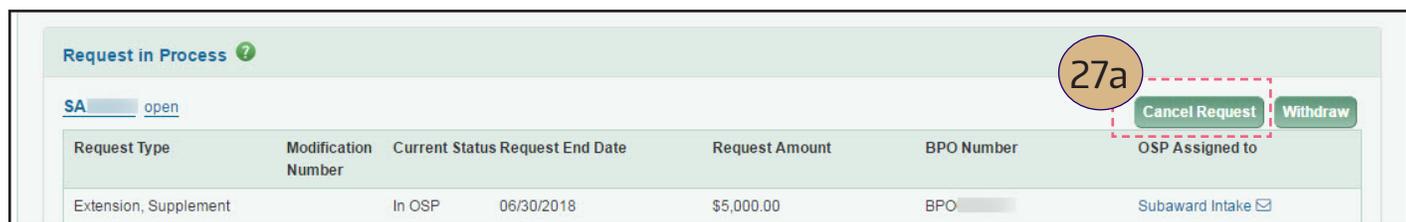
As a subaward is processed, it is given a status in the following order:

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**.

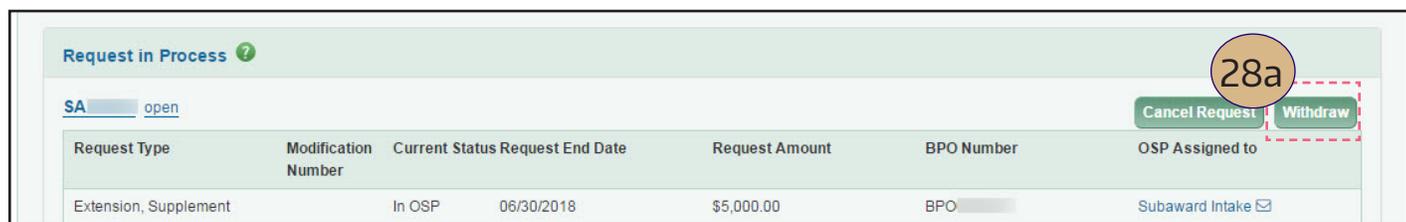


**(b)** A confirmation message will appear. Select **Yes** to cancel the subaward.

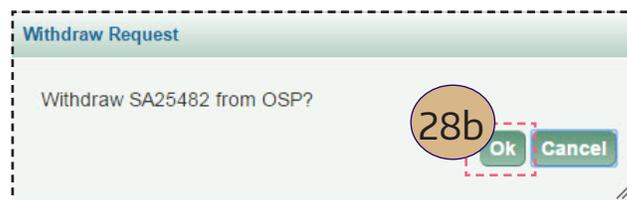


## WITHDRAW REQUEST

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.

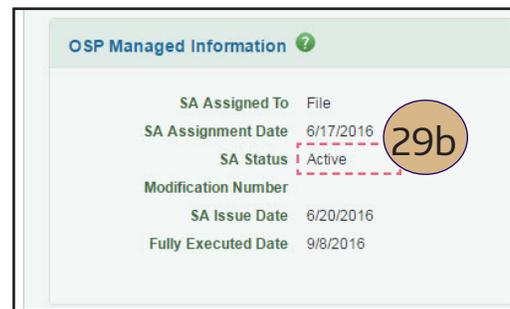


## DETAILS PAGE

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 or Expired 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" or "Expired" status**

**My Subawards** ?

Search:  My Subawards

Display Latest Request statuses:  
 Composing  In OSP  OSP Assigned  Withdrawn  Returned  Issued [Select All](#) [De-Select All](#)

Display Subaward statuses:  
 Active  Expired  Closed Out  Canceled [Select All](#) [De-Select All](#)

Subaward Number	Subrecipient Name	Latest Request Status	Subaward Status	Subaward Start Date	Subaward End Date	Total Subaward Amount	UW PI	Latest BPO Number	FA Org Code	eGC1 Number	eGC1 Short Title
SC	University of Cambridge	Composing	Active	5/5/2016	5/4/2017	\$254,014.00		BPO158	3040122500	A	GSK Phase II
SC	University College London	Composing	Active	5/5/2016	5/4/2017	\$200,734.00		BPO157	3040122500	A	GSK Phase II
SC	Virginia Polytechnic Institute and State University	In OSP	Active	6/1/2013	5/31/2017	\$60,425.00		BPO006	3040922670	A	AAV Resp R01

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

**Request in Process** ?

There is no request in process for this subaward.

32. Select the eGC1 **Number**; the value will populate on your request form

**Choose eGC1** x

Only eGC1s in the same competitive segment (cycle) as your original subaward request will display. Not seeing the eGC1 you expect? Contact OSP.

Search for:  by eGC1 Number

Number	PI Name	Short Title	Sponsor Name	Start Date	End Date
A10					
A10					

**SEARCH RESULTS:** Only eGC1s associated with the same competitive segment (cycle) will display.

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.

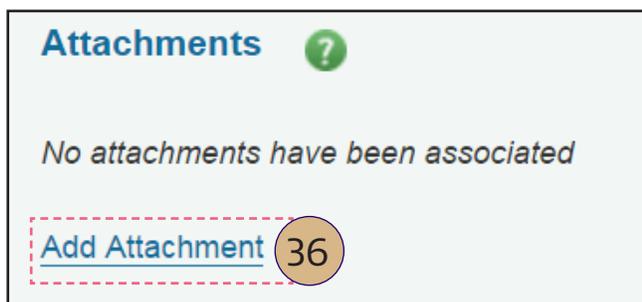
**CR/BPO NUMBER:** This information is located in Ariba. Enter the digits only from your CR or BPO number here.

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).

Modification Type	Request Description	Data Required
Extension**	For a new Subaward End Date which extends the current project period	New Request End Date
Early Termination**	For a new Subaward End Date which shortens the project period	New Request End Date
Funding Change	For a decrease (Deobligation) or increase (Supplement) to the subaward's funding.  Enter a negative Funding Change Amount for a Deobligation	<ul style="list-style-type: none"> <li>Funding Change Type: Deobligation or Supplement</li> <li>Funding Change Amount</li> </ul>
Scope Change	For a change in the Scope of Work (SoW)	An attachment that includes background info/objectives and work to be performed
Other Modification	For other changes	Special Terms or Instructions for OSP

\*\*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



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

37. Check **required fields are complete**

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



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

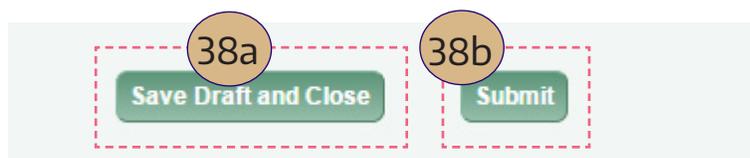
38. Select **(a) Option A** or **(b) Option B** that represents the modification request

## 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.

**My Subawards** ?

Search:  My Subawards

Display Latest Request statuses:  
 Composing  In OSP  OSP Assigned  Withdrawn  Returned  Issued [Select All](#) [De-Select All](#)

Display Subaward statuses:  
 Active  Expired  Closed Out  Canceled [Select All](#) [De-Select All](#)

Subaward Number	Subrecipient Name	Latest Request Status	Subaward Status	Subaward Start Date	Subaward End Date	Total Subaward Amount	UW PI	Latest BPO Number	FA Org Code	eGC1 Number	eGC1 Short Title
SC	University of Cambridge	Composing	Active	5/5/2016	5/4/2017	\$254,014.00		BPO158	3040122500	A	GSK Phase II
SC	University College London	Composing	Active	5/5/2016	5/4/2017	\$200,734.00		BPO157	3040122500	A	GSK Phase II
SC	Virginia Polytechnic Institute and State University	In OSP	Active	6/1/2013	5/31/2017	\$60,425.00		BPO0064	3040922670	A	AAV Resp R01

### 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.

# SEARCH FOR SUBAWARDS

**My Subawards** ?

Search  My Subawards **A1** Search Clear Search Create New Subaward

Display Latest Request statuses: **A2**

Composing  In OSP  OSP Assigned  Withdrawn  Returned  Issued [Select All](#) [De-Select All](#)

Display Subaward statuses: **A3**

Active  Expired  Closed Out  Canceled [Select All](#) [De-Select All](#) **A4**

Subaward Number	Subrecipient Name	Latest Request Status	Subaward Status	Subaward Start Date	Subaward End Date	Total Subaward Amount	UW PI	Latest BPO Number	FA Org Code	eGC1 Number	eGC1 Short Title
SC	University of Cambridge	Composing	Active	5/5/2016	5/4/2017	\$254,014.00		BPO158	3040122500	A	GSK Phase II
SC	University College London	Composing	Active	5/5/2016	5/4/2017	\$200,734.00		BPO157	3040122500	A	GSK Phase II
SC	Virginia Polytechnic Institute and State University	In OSP	Active	6/1/2013	5/31/2017	\$60,425.00		BPO0064	3040922670	A	AAV Resp R01

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

The screenshot shows a web form for requesting an ASTRA role. The fields are as follows:

- Application:** A5 (Callout) - SAGE (System to Administer Grants Electronically) [dropdown]
- Role:** A6 (Callout) - Subaward Preparer [dropdown] [Help]
- Action:** A7 (Callout) - Read-Write [dropdown]
- Limit:** Please Select a Limit [dropdown]
- ASTRA Role:** [Help]
  - User A8 (Callout) Authorizer
  - Delegator
  - Process Authorizer

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.

Subawards/Modifications					
Campus Role or Access Type	Create New Subaward or Modification	Edit in Composing, Withdrawn or Returned Status	Edit Contact Info (from Overview Page)	Edit Manage Access List	Open Subaward & View Request Details
ASTRA Role SAGE Subaward Preparer	Create Only New Subawards		YES	YES	YES
SAGE Role Subaward Contact (PI, Preparer, Financial)	Create Only Modifications	YES	YES	YES	YES
SAGE Role Assigned Read-Write	Create Only Modifications	YES	YES	YES	YES
SAGE Role Assigned Read-Only					YES
Any SAGE Role on associated eGC1s					YES

## 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 or have the Subaward Preparer ASTRA role, 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.

The screenshot shows the 'Subaward Request Details' page. At the top right, a green button labeled 'Manage Access' is circled in orange and labeled 'A9a'. Below the header, there are several fields: 'eGC1\*' with a 'Change eGC1' link, 'Project Title' (A randomized controlled trial of telephone-delivered cognitive behavioral therapy, modafinil, and combination therapy for fatigue in multiple sclerosis), 'Project Short Title' (UMich PCORI SubC), 'Subrecipient\*' with a 'Look Up Subrecipient' button, and 'Funding Action\*' with a 'Look Up Funding Action' 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.

The screenshot shows the 'Subaward Overview' page. At the top right, a green button labeled 'Manage Access' is circled in orange and labeled 'A9b'. Below the header, there is a 'Subaward Summary' section with the following details:

<b>Project Title</b>	Phase 2 of the Innovation Challenge Fund (ICF) (GSK Phase II)	<b>Subaward Start Date</b>	5/5/2016
<b>Project Short Title</b>	GSK Phase II	<b>Subaward End Date</b>	5/4/2017
<b>Subrecipient</b>	University of Cambridge	<b>Subaward Total Amount</b>	\$254,014.00
<b>Subaward Status</b>	Active	<b>Automatic carry forward authorized by PI?</b>	No

# 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).

The screenshot shows a web interface titled "Manage Access For SC". It contains two main sections:

- Subaward Managed Access (A10):** A table with columns "Name", "Permission Type", and "Reason". It lists three users with "Owner" permissions. Below the table is a link "Add Another User".
- Related eGC1 Access (A11):** A table with columns "Name", "Permission Type", and "Reason (eGC1 Number)". It lists three users with different permission types: "Budget Preparer", "Administrative Contact", and "Budget Contact".

Name	Permission Type	Reason
C. [redacted]	Owner	UW PI
M. [redacted]	Owner	Subaward Preparer
M. [redacted]	Owner	Financial Contact

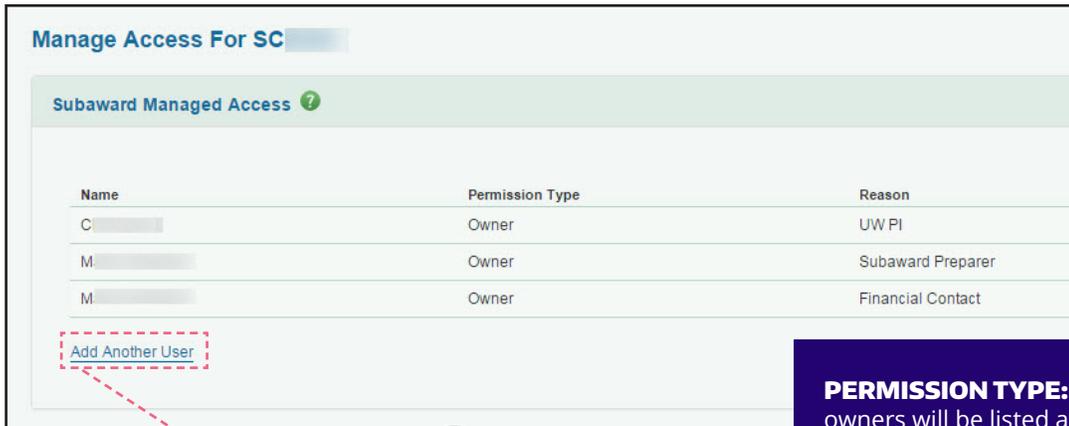
Name	Permission Type	Reason (eGC1 Number)
M. [redacted]	Budget Preparer	A10 [redacted]
M. [redacted]	Administrative Contact	A10 [redacted]
M. [redacted]	Budget Contact	A10 [redacted]

## 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.

# SUBAWARD MANAGE ACCESS: ADD A USER



**PERMISSION TYPE:** Subaward owners will be listed automatically. Owners include UW Principal Investigator (PI), Subaward Preparer and Financial Contact.

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.

## SUBAWARD MANAGE ACCESS: READ-WRITE

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.

The screenshot shows a web interface titled "Manage Access For SC". Below the title is a section "Subaward Managed Access" with a table. The table has three columns: "Name", "Permission Type", and "Reason". There are five rows of data. The fourth row has a dropdown menu for "Permission Type" that is open, showing "Read/Write", "Read Only", and "Read/Write" options. A red dashed box highlights this dropdown menu, and a callout bubble labeled "A15" points to it. The fifth row has a trash can icon in the right margin, which is also highlighted with a red dashed box and a callout bubble labeled "A16". At the bottom left of the table area, there is a link "Add Another User".

Name	Permission Type	Reason
C [redacted]	Owner	UW PI
M [redacted]	Owner	Subaward Preparer
M [redacted]	Owner	Financial Contact
S [redacted]	Read Only	Assigned Access
B [redacted]	Read/Write	Assigned 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/myresearch-lifecycle/setup/subawards/>

Check Subaward Status <https://myresearch.washington.edu/>

Subawards User Guide <http://www.washington.edu/research/tools/sage/guide/subawards>

Research Administration Data <http://www.washington.edu/research/tools/research-administration-data-rad/>

### Support:

### Office Hours: Mon-Fri

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

8am-5pm

Policy: Subawards (206) 543-4043  
ospsubs@uw.edu

8am-5pm

Procurement: Ariba (206) 543-4500  
pcshelp@uw.edu

8am-12pm  
1pm-4:30pm

# 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