



Outbound Subagreement IBIS Submission Guidance

Prerequisite Checklist:

- Notice of Award or fully executed contract funding the subaward must be processed in Workday (subawards are not issued under advance accounts)
- Subrecipient must be registered and active in UMarketplace as a vendor (supplier is Active for Shopping in UMarketplace)
- Subrecipient must have an active sam.gov registration if original source of funding is federal, state, or local government, including Children’s Trust
- Subaward must be approved by the sponsor as evidenced by the existence of a corresponding sub grant line in Workday (appropriate subrecipient supplier must be associated with the grant line)

Outbound Subagreement IBIS Submission Instructions:

1. Navigate to the associated IBIS Award and click Create Agreement:  [Create Agreement](#)

2. Select Outbound Subagreement from the dropdown:

*Select an Agreement Type to create:

3. Navigate to Related Projects tab in the IBIS Award, where the new OS should now be listed. Select the new OS ID.

4. Click Edit Agreement:

[Edit Agreement](#)

5. Agreement Upload Tab

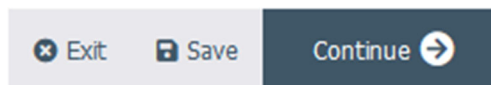
[Agreements](#)

<p>1. Agreement manager/Principal investigator:</p> <input type="text"/>	<p>The Agreement manager/Principal Investigator should be the PI overseeing the overall project</p>
<p>2. * Primary contact:</p> <p>Holly Kasem-Beg <input type="text"/> <input checked="" type="checkbox"/></p>	<p>Primary contact automatically populates with the name of the individual submitting the request but can be changed. Primary contact given will be the administrative contact named in the agreement and the individual contacted for all questions related to the request</p>
<p>3. * Upload agreement draft: (or check the box below) <input type="checkbox"/></p> <p>[None] <input type="button" value="Upload"/></p>	<p>Given that RA drafts all outbound subagreements, the box beside First draft to be generated internally? must be selected</p>
<p>4. Title or internal reference number: <input type="checkbox"/></p> <input type="text"/>	<p>Title should be in the following format: Outbound_[Subrecipient Name/Sponsor Name]_[Workday AWD No.]</p>
<p>5. * Agreement type:</p> <input type="text" value="Outbound Subagreement"/>	<p>Agreement type should always be Outbound Subagreement</p>



<p>6. Description:</p>	<p>The description box must contain the sub grant line. This field should also be used to communicate any special instructions to the Contracts Team.</p>		
<p>7. Supporting documents:</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p style="text-align: center;">+ Add</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Name</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">There are no items to display</td> </tr> </tbody> </table> </div>	Name	There are no items to display	<p>The following documents must be uploaded here:</p> <ol style="list-style-type: none"> 1. Completed Subrecipient Commitment Form 2. Subrecipient SOW 3. Subrecipient Budget and Budget Justification 4. Notice of Award
Name			
There are no items to display			

5. Click Continue:



6. General Information Tab

<p>1. * Contracting party:</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <input style="width: 100%;" type="text"/> ... </div> <p style="font-size: small;">If you cannot find the organization in the list above, enter its information here: Contracting party name:</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <input style="width: 100%;" type="text"/> </div>	<p>Ensure the Contracting Party is consistent with the supplier associated with the established grant line in Workday.</p>						
<p>2. Contracting party contact name:</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <input style="width: 100%;" type="text"/> </div>	<p>This Contact should be an individual employed by the Contracting Party responsible for the negotiation of agreements.</p>						
<p>3. Contracting party contact e-mail:</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <input style="width: 100%;" type="text"/> </div>	<p>Email address is required.</p>						
<p>4. Contracting party contact phone:</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <input style="width: 100%;" type="text"/> </div>	<p>Optional.</p>						
<p>5. * Responsible department/division/institute: ?</p> <p>ORA Administration ... ✕</p>	<p>Automatically populates – change only as needed to ensure accuracy.</p>						
<p>6. Agreements collaborators: (institutional staff given read/edit permissions for this Agreement)</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <input style="width: 100%;" type="text"/> ... </div> <table border="1" style="width: 100%; border-collapse: collapse; font-size: x-small;"> <thead> <tr> <th style="text-align: left;">Name</th> <th style="text-align: left;">E-mail</th> <th style="text-align: left;">Phone</th> </tr> </thead> <tbody> <tr> <td colspan="3" style="text-align: center;">There are no items to display</td> </tr> </tbody> </table>	Name	E-mail	Phone	There are no items to display			<p>Ensure all individuals who must have read/edit access to the request are added.</p>
Name	E-mail	Phone					
There are no items to display							

7. SUB Agreement Information

<p>1. * Prime Funding Agency:</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <input style="width: 100%;" type="text"/> ... </div>	<p>Prime Funding Agency should be the entity funding the subaward.</p>
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<p>2. Project Title:</p> <input type="text"/>	<p>Project Title should be consistent with the prime award project title or the title given in the Subrecipient Commitment Form.</p>
<p>3. Prime Award ID:</p> <input type="text"/>	<p>Prime Award ID should be consistent with the prime award funding the subaward (FAIN or other unique identifier)</p>
<p>4. * Subaward ID:</p> <input type="text"/>	<p>Should be the IBIS ID (OSXXXXXXXX)</p>
<p>5. * Subrecipient PI First Name:</p> <input type="text"/>	<p>This should be consistent with the Subrecipient Commitment Form.</p>
<p>6. Subrecipient PI Middle Initial:</p> <input type="text"/>	<p>This should be consistent with the Subrecipient Commitment Form.</p>
<p>7. * Subrecipient PI Last Name:</p> <input type="text"/>	<p>This should be consistent with the Subrecipient Commitment Form.</p>
<p>8. * Direct costs:</p> <input type="text" value="\$0"/>	<p>Direct Cost total given must be equal to the total direct costs specified in the subrecipient's budget for the annual increment being obligated.</p>
<p>9. * Indirect costs:</p> <input type="text" value="\$0"/>	<p>Indirect Cost total given must be equal to the total indirect costs specified in the subrecipient's budget for the annual increment being obligated.</p>
<p>10. * Total costs:</p> <input type="text" value="\$0"/>	<p>Automatically populates.</p>
<p>11. Estimated Total Costs:</p> <input type="text"/>	<p>Optional.</p>
<p>12. * Budget start date:</p> <input type="text"/>	<p>Budget Start Date must be within the prime award period of performance.</p>
<p>13. * Budget end date:</p> <input type="text"/>	<p>Budget End Date must be within the prime award period of performance.</p>
<p>14. Estimated project start date:</p> <input type="text"/>	<p>Optional.</p>
<p>15. Estimated project end date:</p> <input type="text"/>	<p>Optional.</p>
<p>16. Carryover: <input type="radio"/> Yes <input type="radio"/> No Clear</p>	<p>Optional.</p>
<p>17. Subject to FFATA: <input type="radio"/> Yes <input type="radio"/> No Clear</p>	<p>Optional.</p>
<p>18. Fixed-price Subaward: <input type="radio"/> Yes <input type="radio"/> No Clear</p>	<p>Optional.</p>



<p>19. Foreign Entity: <input type="radio"/> Yes <input type="radio"/> No Clear</p>	<p>Optional.</p>
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8. SUB Regulatory Compliance Tab

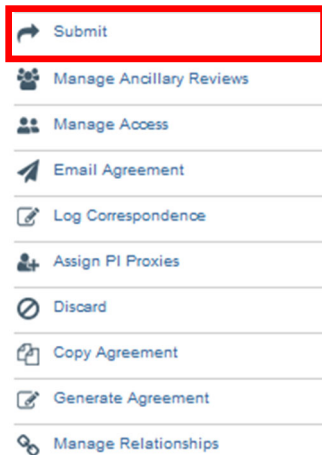
<p>1. Are Human Subjects Involved: <input type="radio"/> Yes <input type="radio"/> No Clear</p>	<p>Must be consistent with the Subrecipient Commitment Form.</p>
<p>2. Are Vertebrate Animals Involved: <input type="radio"/> Yes <input type="radio"/> No Clear</p>	<p>Must be consistent with the Subrecipient Commitment Form.</p>

9. SUB Risk Assessment Tab: DO NOT COMPLETE

10. Completion Instructions Tab: confirm all information inputted accurately and Click Finish



11. The OS should now be in Pre-Submission status. Click Submit on the leftmost menu:



Notes: 1) Submission of an Outbound Subagreement request in IBIS constitutes department and PI approval to proceed with execution of the agreement in accordance with the information supplied in the IBIS Create Agreement form.

2) Failure to comply with this guidance document may result in rejection/discarding of the Outbound Subagreement request or a formal Request for Clarification in IBIS.