Kuali Proposal Development SUBCONTRACTS
UMass Amherst Best Practices and Kuali Knowledge Base Guide

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https://umass.kuali.co/dashboard

GET HELP
- The **Help Icon** in Kuali brings you to Kuali knowledge base:
  https://kuali-research.zendesk.com/hc/en-us/categories/115001645868-Knowledge-Base
- Research & Engagement website: www.umass.edu/research/kuali-guides
- Kuali Knowledge Base **Field Definitions by Tab:**
  https://kuali-research.zendesk.com/hc/en-us/articles/115012912788-Proposal-Field-Definitions-by-Tab
- TIP: Use **Wildcard asterisk (*before and after*)** to assist with searching for sponsors, people, etc. in Kuali.

SUBCONTRACTS
https://kuali-research.zendesk.com/hc/en-us/articles/115016054048-Proposal-Budget-Subawards

ADD SUBRECIPIENTS IN ORGANZIATIONS & LOCATIONS TAB
1. Always add subcontracts in the **Other Organizations** tab.
2. Click the blue **Add Organization** button to search for your subcontract organization.
3. If the organization is not in the system, make a request to **Research IT** to have it added (provide link when available).
4. If this is a GRANTS.GOV proposal, don't forget to add the Congressional District.
   a. Click the white **+ Add Congressional District** button.

NOTE: If there is no **DUNS Number** listed, then you will need to make a request to **Research IT** to have it added.

ADD SUBRECIPEINT KEY PERSONNEL IN PERSONNEL SECTION
1. Click the blue **Add Personnel** button.
2. Select **Non-Employee**.
3. Search for the subcontract personnel **or** manually add the person in the **Address Book** by clicking **Add New Address Book** in in the upper right corner.
4. Fill out as much detail as possible including; Email, Phone and Address & 9 digit zip code
5. Once added or selected, assign the role of **Key Person** and identify their role. Examples: Subcontract PI, Subcontract CO-I, etc.

ADD THE SUBRECIPEINT TO THE BUDGET IN SUBAWARDS
1. Click the white **+ Add Subaward** button.
2. Search for **Subrecipient Organization**.
3. Once the organization is added you can manually add the Direct and F&A Costs for each subrecipient for each year **OR** upload the completed fillable R&R budget form if you are doing a detailed NIH budget.
4. Subrecipient cost will then be populated in the UMass Prime Budget.