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
- TIP: Use Wildcard asterisk (*before and after*) to assist with searching for sponsors, people, etc. in Kuali.

SUBCONTRACTS

ADD SUBRECIPIENTS IN ORGANIZATIONS & 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.