Setting up a Subcontract
Child Account
If the Award List screen is already open, click on the search button. Search for the parent’s account number using the Account No. field.

Otherwise, select the menu option **Maintain > Awards**.

Or click on the **Maintain Award** button.

Search for the parent’s account number using the Account No. field.
Once you find the parent account, then select menu option **Edit > Award Hierarchy…**

Or click on the Award Hierarchy button.

Select **New Child** when the Award Hierarchy window opens.

Select **Copy From Parent** when the Create Child window opens and click **OK**.

**Award Detail Screen:**

COEUS will automatically create the new child account and take you to the Award Detail Screen. An award extension of 002 and above denotes a child account. Change the Status of the account to **Hold**.

**Begin Date:** The date spending is officially allowed on the subcontract. In this case, it is the same as the Effective Date.

**Effective Date:** Effective date on fully executed subcontract.

The rest of the data will remain the same as the parent account.
Fund the proposal to the award by selecting the menu option **Details > Funding Proposals**…

Add a proposal by clicking on **Add**

Search for the proposal to the award using any combination of the available fields.
Select the correct proposal and click **OK**

The proposal is now funded under the child account. Click **OK** to close window.

**Money and End Dates Screen:**

**Obligated Amount:** Amount obligated to subcontract *including* both direct costs and applicable indirect costs.

**Anticipated Amount:** Funding anticipated for the entire subcontract. This includes current obligated amount and anticipated incremental funding for future funding years. All anticipated funding *includes* both direct costs and applicable indirect costs.

**Obligation Effective Date:** DO NOT FILL IN.

**Obligation Expiration Date:** End date of current funding period. Must be the same as or earlier than final expiration date.

**Final Expiration Date:** Expiration date of currently funded period plus anticipated unfunded periods, including possible option years.

This examples shows $30,000 being transferred from XCS0007 (parent account) to the child account plus $12,375 of overhead. Therefore, the total amount being transferred to the child is $42,375.

**NOTE:** The transferring of money between parent and child accounts *SHOULD ALWAYS* take place from the child account.
The remaining screens will be populated automatically from the parent account and no changes are required.

Cost Sharing:

Open the Cost Sharing Screen by selecting the menu option Details > Cost Sharing...

If there is any cost share information Delete it.

Indirect Cost:

Open the Indirect Cost Screen by selecting the menu option Details > Indirect Cost...
Indirect Cost Screen:

An additional indirect cost row will appear because a proposal was funded. **Delete** it.

Click **OK** to close the Indirect Cost screen.

Save your work.

All the previous information must be entered in order to request an Agency/Org number but don’t forget you still have to complete the allocation information.

**Allocation:**

Select the menu option **Details > Allocation...**
Or click on the Allocation button.

Award Allocation Screen:

The Fiscal Year Total should always add up to 100. Only one RID Unit should be checked. The Allocation Start Date should always be a year earlier than the Begin Date of the award and the Allocation End Date should always be a year after the Final Expiration date of the award. Save allocation when done.

Technically, there shouldn’t be any allocation on a subcontract child account. But because we cannot clear out the allocation percentages, the PI should have the entire allocation.

Save when you have completed your work. You are now ready to request an AGENY/ORG number.

Select the menu option Details > Account...
Or click on **Account** button.

Award Account Number Screen:

Make sure all the information is correct before creating a new account number. If the information is correct, click **Create New Account**. The **Use Existing Account** button should not be used under any circumstances. If the information is not correct, close the window and make the required changes.

A Warning before the systems creates an account number will be given. If you are sure you want to create a new Account number click **Yes**.

The next screen will give you the new account number. Click **OK**

Then click **Close**.
The new account is now displayed in the Award Detail Screen.

Save and close the award screen.

Updated Award Hierarchy:

If the current activation must get updated and the paperwork has NOT gone to SPA/GCA, use the Edit button to make any corrections. Otherwise, prepare a new activation using the New Entry button. Any corrections made to the Money and End Dates Screen will create a new amount sequence number in the award history when you save.