

ERSO BearBuy Subaward Process

PO Process

Step	Owner	Activity
1	RSO	Fills out SPO <i>Request for New Subaward</i> form
2	SPO	Issues SA# and agreement; sends completed agreement to RSO email alias.
3	RSO	Secures PI approval ² ; sends email to Purchasing (ersopurchasing@erso.berkeley.edu) to initiate Subaward PO in BearBuy. Email includes: chartstring ¹ , PI approval, SPO SA Agreement and SPO <i>Request for New Subaward</i> form. <ul style="list-style-type: none"> Email subject line: "Subaward: <PI last name> <Fund #> <Subawardee>"
4	Purchasing	Completes the <i>BearBuy Subaward</i> form ³ based on the completed SA Agreement. Applies naming convention for each line (one each for account 57810 and 57811): Subaward #, period of performance, e.g. "SA1234, 01/01/2013 - 12/31/2015". Submits Requisition for RSO approval.

¹ Note that program code is 80 for other UC campus subaward POs (one line only).

² In lieu of email approval/signature, RSO can copy PI in subaward request to purchasing

³ SA PO creation guidelines for non-UC Subawards:

- PO Line 1 is overhead \$25K (account code: 57811)
- PO Line 2 is subaward balance (account code: 57810)

Amendment Process⁵

1	RSO	Uploads the completed <i>Request to Amend Existing Subaward</i> form as an attachment with comment noting 'SA Amendment' to the ERSO Purchasing coordinator. (This action will require a change order by Purchasing).
2	Purchasing	Revises the PO with new amount or chartstring, finalizing the PO.

⁵ Note that a Subaward amendment is necessary in BearBuy only if the change affects the PO; i.e., if dollar amount or chartstring change.

Invoice Process

1	Disbursements	Vouchers invoice against PO ⁶
2	RSO	Identifies pending voucher for approval through BearBuy Document Search; downloads invoice from BearBuy and sends to PI for review and payment approval. Email approval is acceptable.
3	PI	Signs or emails acceptance of invoice.
4	RSO	Scans PI-approved invoice or email and uploads docs to the <i>Receipts</i> tab.
5	RSO	Approves voucher in Bearbuy.

⁶ Invoices vouchered by Disbursements to BearBuy need not be received in BearBuy; those signed by PI and scanned/uploaded by RSO must be received in BearBuy by RSO in the Receipts tab; see the [ERSO BearBuy Receiving Process](#) and ERSO [BearBuy Cost Receiving Quick Guide](#) for further guidance.