

BruinBuy *Plus*
Research Update

SUBAWARD/SUBCONTRACT INVOICE APPROVAL WORKFLOW

As we discussed in last month's meeting, beginning this fall Principal Investigators (PIs) will be required to approve subaward/subcontract invoices in the **BruinBuy Plus** system. This is a change from current state, where PIs' approval is obtained **outside the system**.

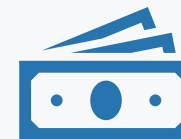
Subaward/Subcontract Invoice Review/Approval Process



First, the **Fund Manager** will review the invoice



Then, the **PI** will review & approve the invoice



Finally, **Accounts Payable** will pay the invoice



PROCESS FOR APPROVING SUBAWARD & SUBCONTRACT INVOICES

- **Fund Managers will review subaward/subcontract invoices** and make corrections and/or adjustments, before the invoice is **sent to the PI for review and approval**
 - **Fund Manager** information will be imported from the Post Award Management System (PAMS) into BruinBuy *Plus*
 - Only Fund Managers with the **Preparer role in PAMS** will be granted access to BruinBuy *Plus*
 - **Department Administrators (“DAs”)** in PAMS will determine whether a different individual (someone other than the individual assigned the Preparer role in PAMS) should be reviewing invoices in BruinBuy *Plus* for their department (i.e., determine if an “override” is necessary)
 - **Next step:** Program Team to **determine process and owner** for sending current list of Preparers to the DAs in PAMS & develop a plan to **maintain Fund Manager “overrides”**
 - **PIs with open awards with subawards/subcontracts** will be granted access to BruinBuy *Plus*, to review and approve subaward/subcontract invoices
 - **Next step:** Program Team to determine how to **access data on PIs with open awards with subawards/subcontracts**
- Fund Managers and PIs will be **set up in DACSS by their DSA**, and will have their **DACSS profile validated** to ensure they have the **right access on the day of go-live**

BENEFITS TO INVOICE APPROVAL IN SYSTEM

- ✓ **Meets federal regulations** regarding PI invoice approvals
- ✓ **Reduces risk of lost invoices** and **incomplete approvals**
- ✓ **Automates invoice routing** with Digital Capture
- ✓ **Generates automatic email notifications** any time there is an invoice pending a PI's approval
- ✓ **Calls out invoices against subcontracts and subawards** to the appropriate the Accounts Payable specialist



DISCUSSION

Given that approving subcontract and subaward invoices in the BruinBuy Plus system is a significant change to the way Pls do business, what will be important for the Program Team to consider when planning training and engagement activities for Fund Managers and Pls?