

Overview

This Job Aid will cover document repositories that exist for each subagreement and subrecipient.

Prerequisites

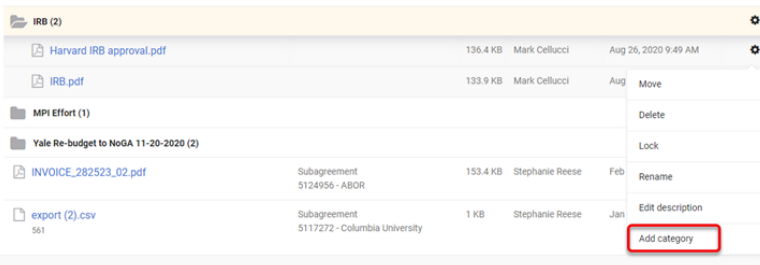
This job aid assumes that the reader understands the basic functionality and terminology of GMAS.

Additional Resources

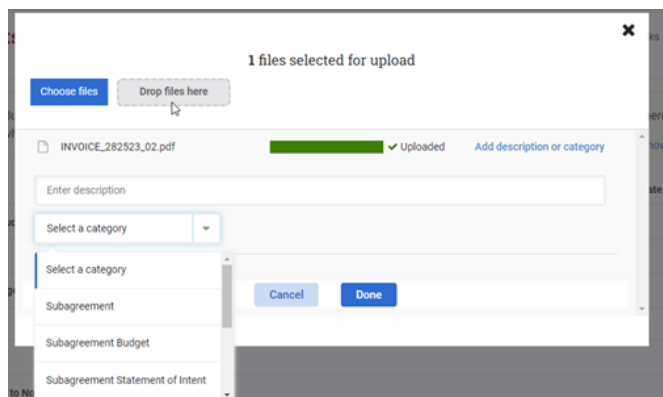
- [Documents Repository Job Aids](#)
- [All Subagreement related Job Aids](#)

Categorizing Documents

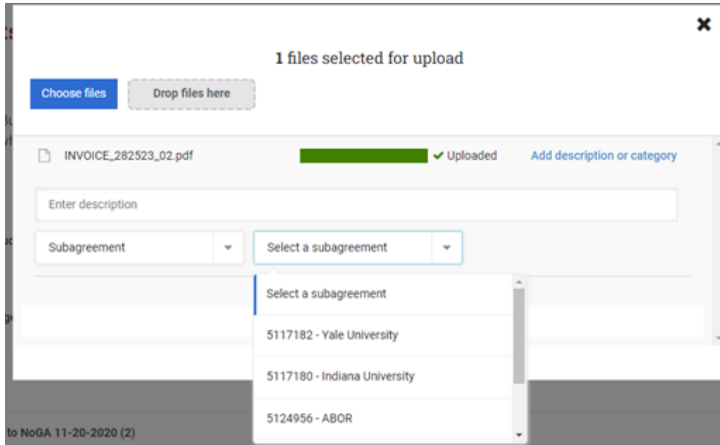
The ability to categorize documents related to subrecipients exists in request repositories, segment repositories, subrecipient repositories and subagreement and subamendment repositories.



Documents can be categorized and if a subrecipient category is selected, an additional option to associate the document to a subrecipient is available. Categories options will only show what's available in that specific repository. Information on available categories can be found in the [Available Categories](#) section of this document.



Prior request version will not display, only subrecipients from that version are available.



Subrecipient Document Repositories

There are three locations from the sub home page where subrecipient related documents can live.

Subagreement and subamendments 1 total | 0 fully executed

Type	Status	Dates	Dollars	Assigned to
Subagreement	Drafting	Jan 13, 2023 - Jan 18, 2023	\$500	Armstrong

Documents 1 document | [Upload](#) [Download all](#)

Filename	Category	Size	Uploaded by	Date
SOW.docx	Subagreement Statement of Work	11.5 KB	Stephanie Reese	Feb 14, 2023 9:33 AM

Documents 1 document | [Upload](#) [Download all](#)

Filename	Category	Size	Uploaded by	Date
Budget.docx		11.5 KB	Stephanie Reese	Feb 14, 2023 9:30 AM

Segment subrecipient documents 1 document | [Download all](#)

Filename	Category	Size	Uploaded by	Date
Training PDF.pdf	Subagreement	83.1 KB	Stephanie Reese	Feb 14, 2023 8:54 AM

Red arrows and numbers 1, 2, and 3 point to the "Documents" link in the "Segment subrecipient documents" section, the "Documents" link in the "Subagreement and subamendments" section, and the document icon in the "Subagreement and subamendments" table, respectively.

Segment Subrecipient Documents

Documents in the request repositories and segment repositories that are associated to subrecipients are visible in a panel on the subrecipient homepage called “Segment subrecipient documents”

Segment subrecipient documents 1 document Download all

Filename	Category	Size	Uploaded by	Date
Segment repository				
INVOICE_282523_02.pdf	Subagreement	153.4 KB	Stephanie Reese	Feb 6, 2023 11:23 AM

This panel is only visible on the screen if there are other repositories throughout the segment that have been associated with the subrecipient record. Secondary headers link to the document repository that the documents were uploaded in.

Segment subrecipient documents 5 documents Download all

Filename	Category	Size	Uploaded by	Date
Segment repository				
Budget Edits.docx	Subagreement	2.8 MB	Stephanie Reese	Feb 9, 2023 1:10 PM
Budget Justification.pdf	Subagreement Budget Justification	153.4 KB	Stephanie Reese	Feb 9, 2023 1:10 PM
Initial proposal #6471481				
2018 - Manderson Harling R21 - Complete.pdf <small>Awarded in 2019, but deferred. PI has indicated the work is to begin 2022.</small>	Subagreement	4.2 MB	Jeanne Frey	Jun 6, 2022 2:21 PM
Wits R21_Facilities.docx	Subagreement Statement of Work	18.6 KB	Jeanne Frey	Jun 6, 2022 2:08 PM
Confirm research team #6487333				
Funding.xlsx <small>Funding Information</small>	Subrecipient IRB Document	11.7 KB	Stephanie Reese	Feb 9, 2023 1:12 PM

Subrecipient Home Documents

In addition to the documents uploaded in other repositories associated with the sub, there is also a section on the subrecipient homepage for documents uploaded to that location. These documents do not need to be categorized to be associated to the subrecipient.

Documents 2 documents Upload Download all

Filename	Size	Uploaded by	Date
AGM.doc <small>Sub Info</small>	52.5 KB	Stephanie Reese	Feb 9, 2023 1:15 PM
SubBudget.docx <small>Budget info</small>	77.2 KB	Stephanie Reese	Feb 9, 2023 1:15 PM

Subagreement/Subamendment Documents

Subamendments have own repositories. Documents can be uploaded to a specific amendment from the amendment homepage.

Subagreement for 5126512
 Arnot Research and Consulting Inc.
 Florence Bareyre

History (10) Info Send to subrecipient Settings

Primary performance location Incomplete [Edit](#)

FFATA statement of work summary [Edit](#)

test

Subrecipient contacts [Edit](#)

testing contact

Documents 1 document [Upload](#) [Download all](#)

Filename	Category	Size	Uploaded by	Date
SOW.docx	Subagreement Statement of Work	11.5 KB	Stephanie Reese	Feb 14, 2023 9:33 AM

Once uploaded to the amendment page, the documents will also show on the subrecipient homepage under each subagreement/subamendment.

Subagreement and subamendments 4 total | 3 fully executed

Type	Status	Dates	Dollars	Assigned to										
Subagreement	Fully executed	Jun 1, 2022 - May 31, 2024		Unassigned										
<table border="1"> <thead> <tr> <th>Filename</th> <th>Category</th> <th>Size</th> <th>Uploaded by</th> <th>Date</th> </tr> </thead> <tbody> <tr> <td> Budget.docx</td> <td></td> <td>11.5 KB</td> <td>Stephanie Reese</td> <td>Feb 9, 2023 1:08 PM</td> </tr> </tbody> </table>					Filename	Category	Size	Uploaded by	Date	Budget.docx		11.5 KB	Stephanie Reese	Feb 9, 2023 1:08 PM
Filename	Category	Size	Uploaded by	Date										
Budget.docx		11.5 KB	Stephanie Reese	Feb 9, 2023 1:08 PM										
Subamendment 1	Fully executed	Jun 1, 2022 - May 31, 2024		Unassigned										
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Subamendment 2	Fully executed	Jun 1, 2022 - May 31, 2024		Unassigned										
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Filename	Category	Size	Uploaded by	Date										
Additional Doc.docx		2.8 MB	Stephanie Reese	Feb 9, 2023 1:09 PM										
Subamendment 3	Under development	Jun 1, 2022 - May 31, 2024		Unassigned										
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Subamd 3 doc.docx	Draft agreement	2.8 MB	Stephanie Reese	Feb 9, 2023 1:09 PM										

Available Categories

Repositories and the available categories for each are listed below. If a repository has related entity ID available, you will be able to associate the document with a specific subrecipient after selecting the category it belongs to.

Requests and Segment Repositories with related entity subagreements:

- Subagreement
- Sub budget
- Sub budget justification
- Sub statement of intent
- Sub statement of work
- Sub IRB document

Segment Repository without related entity ID:

- FFATA report

Subagreements Repositories without related entity ID:

- Budget
- Budget justification
- Revised budget
- Revised budget justification
- Statement of intent
- Statement of work
- Sub IRB document

Amendments Repositories without related entity ID:

- Budget
- Statement of work
- Draft agreement
- Final agreement