General Notes:
- Master Agreements will be generated as Awards
- Individual Task Orders, Protocols, Work Orders, etc. will be generated as separate awards as invoicing and financial reporting will be specific to the Task Order, Protocol, Work Order, etc.
- This applies to new Master Agreements and Task Orders, etc. Previously set up awards will not be re-done unless there are extenuating circumstances.

MASTER AGREEMENTS for $0

Complete all entries as normal with the exception of the following:

Grants > Proposals > Maintain Proposal

Proposal tab:
- Title field: should read “MASTER:” and then the actual award title
- Purpose = MSTRA (for Master Agreement)

If a Task Order / Work Order was sent with the Master Agreement:
- Add an Additional Information Type of Related Proposals, click on the icon and enter the PS Proposal Number of the Task Order / Work Order.

Budgets tab, F&A and Pricing Setup
- Establish Pricing Method and Product values based on expected values for Task Orders / Work Orders to be issued underneath the Master Agreement. If it is unknown what type of awards will be received, leave the default value “As Incur”
- Select applicable F&A Rate Type
- Leave the default values for FA Base and Budget Rates in Budget section.

Budgets tab
- Do not enter any sponsored budget lines.
- Enter budget lines and associated information for cost share, if needed. It is highly unusual to have cost sharing on $0 master agreements.

Complete any necessary information in the eTool or other applicable information page for Award Setup (terms, non-financial reporting information, etc)

MASTER AGREEMENT WITH ADMINISTRATIVE COSTS

Complete all entries as normal with the exception of the following:

Grants > Proposals > Maintain Proposal

Proposal tab:
- Title field: should read “MASTER:” and then the actual award title
- Purpose = MSTRA (for Master Agreement)

If a Task Order / Work Order was sent with the Master Agreement:
- Add an Additional Information Type of Related Proposals, click on the icon and enter PS Proposal Number of the Task Order / Work Order.
TASK ORDERS / WORK ORDERS UNDER MASTER AGREEMENTS

Complete all entries as normal with the exception of the following:

Proposal tab:
Grants > Proposals > Maintain Proposal

- Purpose = Choose the appropriate value: Task Order, Purchase Order, Clinical Trial, Research, etc. (not Master Agreement)
- Add an Additional Information Type of Related Proposals, click on the icon and enter PS Proposal Number of the Master Agreement.

On the Master Agreement Award Profile - Additional Information hyperlink, add or update the Additional Information Type of Related Proposal, click on the icon and enter the Task Order/Work Order Proposal Number.

Terms and Conditions (enter in eTool or Terms spreadsheet)

- Include a term under Regulatory (REG95) that states: “Refer to Master Agreement for Overall Terms and Conditions” and include the Master Agreement Contract Number. (This is used only if different or additional.)

NOTE: The applicable terms of the Master Agreement should be spelled out in the Terms section in PS for the Work Order / Task Order, if possible, especially the IP, publication, and cost-related terms (rebudgeting, restrictions on travel or other budget items). If the IP provisions are too lengthy or detailed to be included in the Terms section, it is acceptable to refer to the Article of the Master Agreement rather than spell it out in detail.

Notepad (enter in eTool)

- Include a comment that states: “Review Master Agreement Award Documents at Grants > Awards > Award Profile (search for Master Agreement CON000000XXXXXX) > View Contract hyperlink > More (dropdown box on bottom right) > Attachments”.

It is not necessary to include a copy of the Master Agreement with a Task Order / Work Order if all applicable terms and conditions of the Master Agreement are spelled out in the individual award for the Task Order / Work Order.