Best Practices & Reminders for PIs
SEFS Grants

- **Don't Change Project titles**
  - If it is early in the proposal life cycle, send SEFS RGC an email, so we can update all the documents on the eGC1
  - DO NOT CHANGE it in the last 10 days of routing; it may inhibit our ability to submit your application
  - Do not repeat short project titles; internal to SEFS, this is not going to the sponsor (ex: Snow Mountain 1, Snow Mountain 2)
- **Always download current** budget templates from the Intranet- SEFS Grants team updates them regularly, rates change with each negotiation
- **Everything moves like molasses;** be aware of deadlines and act as early as possible
- **Reference Grant worktags** in all communication- we have around 50 PIs, 500 award lines, and 3 grant staff
- **One email, one topic- clear subject lines**
  - Numbers as of 10/17/2024
    - Proposals: 12
    - Open grants: 319
    - Award Set Up Requests (ASRs): 62
    - Award Modifications (MODs): 135
    - Open Invoices: 107
    - Open Award Portal Tickets: 31
    - Emails to shared inbox per week:
- **NO MONEY CAN BE SPENT WITHOUT PRIOR APPROVAL from Procurement/**NO work can start until the vendors & POs are in the system
  - Grant approval does not mean UW Procurement approval
  - Independent contractors- need to be in the system and approved before ANY work can be started; otherwise it is unauthorized
    - Step 1: Set up as a suppliers in the system
    - Step 2: Set up the PO for the work to be done

- o   If you do this, the process takes 2-3 days!
- o   Unauthorized- takes significantly more time & more red tape
- **Follow UW rules first-** an OK from the sponsor, isn't necessarily an OK if it goes against UW policy
- **Don't respond to the notifications from GCA**
  - o   Award tracker, ASRs, etc
  - o   If you have <u>any questions</u> about the notifications, forward your questions to SEFS RGC so that we can take action