EP DEPT RES ADMIN NEW AWARD REVIEW AND STAGING

For use by staff to assist PI’s with project management after notification, staging, and project number assigned for new awards.

1. **Pre & Post Award Data Maintenance**
   
   Update award info in the Depts current year data sheet that tracks numbers of proposals, and award numbers and dollars by PI.

2. **Stage Project Spreadsheet**
   
   Setup to reconcile expenditures, pre-load payroll plans and effort, and future projected balances.

3. **Terms and Conditions Summary**
   
   Used by staff and PI’s to call out specific restrictions, requirements, cost sharing plans, reporting, and other contract highlights or outliers. Used as reference by staff when approving transactions.

4. **Payroll and Effort Plans**
   
   Review approved budget to up master payroll grid showing funding plans, and for communicating those plans to Dept payroll admin staff.

5. **Equipment Purchases**
   
   Review approved budget for equipment purchases—either stand-alone, or fabrications and components. Determine who has title to equipment, and ensure all prior approvals are provided.

6. **Pre-Closing and Final Reviews**
   
   Apply proactive practices with purchasing, payroll, and travel forms and justifications to enable closing activity and reviews with RSP.