Fund Manager CT Weekly Training Session Topics
Revised July 9, 2025

1) **Introduction to Clinical Trials – Wednesday, August 20th**
    a) Overview of financial lifecycle
    b) Clinical Trial (CT) roles and responsibilities
    c) Overview of pre-award process
    d) Understanding financial management and close-out

2) **Pre-Award Documents – Wednesday, August 27th**
    a) Clinical Trial Office intake
    b) CT application checklist – internal documents
    c) Best practices

3) **Pre-Award OnCore – Wednesday, September 3rd**
    a) OnCore workflow
    b) Notifications for Fund Managers
    c) Updating Parameters and verifying Milestones
    d) Submitting Study Team Signoff and FAU entry
    e) Subject Visit Data

4) **Budgeted Costs – Wednesday, September 10th**
    a) Understanding Cost List
    b) Determining Study Team salaries
    c) Ancillary recharges
    d) Hard costs vs soft costs
    e) Non-profit rates vs industry rates

5) **Post-Award Contract/Award Review – Wednesday, September 17th**
    a) Post-award contract/award terms
    b) Reviewing payment terms and schedule
    c) Contract amendments and No-Cost-Time-Extension (NCTE)

6) **Post-Award Calc/Financial Tracking – Wednesday, September 24th**
    a) Calc sheets for tracking and invoicing study-related expenses
    b) How to determine salaries based on study and other related costs
    c) How to incorporate projections from clinical trials

7) **Post-Award Invoicing & Ledger Reconciliation – Wednesday, October 1st**
    a) Invoice management
    b) How to handle delayed sponsor payments
    c) Ledger reconciliation and management

Online Registration Form*
https://forms.gle/TfDzESGh7KF9trpv8

***Department of Medicine Fund Managers only** use FAU: 441026-2X-07427-WFMT*

All classes are held via Zoom. Wednesday sessions are <u>9:00 am – 11:00 am</u>.**

Zoom sessions will **not be recorded**, but most slide decks will be posted prior to class: https://medschool.ucla.edu/research/researcher-resources/administrative-support/department-medicine-office-research-administration/fund-management-training.

A reoccurring Zoom Outlook meeting invitation will be sent to you once your registration has been processed. **Feel free to delete the individual calendar invitations for classes which you are not registered.** Keep in mind you will only be admitted into your registered classes.

COST:
$45/person/session***
$315 for all 7 sessions***

***Please cancel at least 24 hours in advance of each class. **If you do not cancel in a timely manner, you will be charged regardless of attendance.** Please send cancellation requests to DOMTraining@mednet.ucla.edu.

When joining the Zoom meeting, we ask that you **have access to a microphone via your PC or phone so we may have a more interactive training experience. If you are using a computer that does not have audio input capabilities, such as a remote desktop, please also call into the meeting via phone. Click here for instructions on how to join meeting audio via phone. **Please remember to enter your participant ID when dialing in to match your video login name with your audio.**