

POWERPOINT LINKS – CLASS 22: GIFTS & ENDOWMENTS

Slide 8: Gift Policy

1. Gift Training Manual:

https://medschool.ucla.edu/sites/g/files/oketem456/files/media/documents/Gift_Training_Manual.pdf

2. UCLA Contract & Grant Manual: <https://www.ucop.edu/research-policy-analysis-coordination/resources-tools/contract-and-grant-manual/chapter9/index.html>

3. UCLA Policy 921: <https://www.adminpolicies.ucla.edu/APP/Number/921>

4. UCLA Gift Services Website: <https://giftservices.support2.ucla.edu/gifts/>

Slide 9: Gift Management & Types

Gift Accounting: <https://eainsider.support2.ucla.edu/>

Slide 12: Regental Gifts | Foundation Gifts

1. New fund set-up online form: <https://giftservices.support2.ucla.edu/ngfr/>

2. Online Transmittal Form: <https://giftsubmission.support2.ucla.edu/>

3. 700U Economic Interest: <https://rpc.research.ucla.edu/coi-forms/>

Slide 14: Fees

1. EA Messenger: eamessengers@support.ucla.edu

2. Brinks Pickup Fees: <https://www.finance.ucla.edu/business-finance-services/payment-solutions-and-compliance/cashiering-supplies>

3. Brinks FAQs: <https://sa.ucla.edu/MessageCenter/OneStop/Public/FAQ?FAQId=1188>

4. Bank of America Deposit Preparation Procedures and Supplies:

<https://ucla.box.com/s/favoecyv99vrue2wvbw4p9z58kyfkc6>

Slide 16: How to Set Up a New Gift Fund

Link: <https://fundmanagement.support2.ucla.edu/gift-fund-establishment/>

Slide 17: Setting Up New Regental or Foundation Funds

1. Online form: <https://giftservices.support2.ucla.edu/ngfr/>

2. Fund Fact Sheet: <https://fundmanagement.support2.ucla.edu/crm-fund-fact-sheet-report/>

3. Access issues: EAApServiceDesk@support.ucla.edu

4. General questions: askfundmanagement@support.ucla.edu

Slide 18: Fund Fact Sheet

Link: <https://fundmanagement.support2.ucla.edu/crm-fund-fact-sheet-report/>

Slide 20: Current Expenditure Gift Funds: Regental (Tax ID # 95-6006143)

1. Gift Received undistributed (GRU): <https://ofsr.it.ucla.edu/FSReports/parameters2.asp?NavCode=RD>

2. Review GRU: https://medschool.ucla.edu/sites/g/files/oketem456/files/media/documents/_DOMORA_Manual_Post-Award_Gifts-Received-Undistributed.pdf

Slide 21: How to Process Regental Gift Checks

1. How to Process Regental Gift Checks: <https://www.finance.ucla.edu/corporate-accounting/depositing-a-gift-check>
2. Instructions for deposit preparation: <https://ucla.app.box.com/s/favoecyv99vrue2wvbw4p9z58kyfkc6>
3. Transact: <https://www.finance.ucla.edu/business-finance-services/payment-solutions-and-compliance/how-to-gain-cashiering-database-access>
4. 4-116030-54805: https://medschool.ucla.edu/sites/g/files/oketem456/files/media/documents/Deposits-Gifts_0.pdf
5. Online Gift Transmittal Form: <https://giftsubmission.support2.ucla.edu/>
6. DOM Executive Admin Office: DOMExecutiveAdmin@mednet.ucla.edu
7. Gift Certification Form:
https://medschool.ucla.edu/sites/g/files/oketem456/files/media/documents/Gift_Certification_0.pdf

Slide 22: SOM Specific: Depositing Donor Gift Checks

Cashiering & Accounts Receivable FAQs: <https://uclahs.app.box.com/s/pdc464hc3361l1k4vu88fmjtzs3hb6h>

Slide 24: Gift Fund Management Tool: Financial Web Report – Gifts Recv'd Undistributed

Financial Web Report: <https://fswj.ais.ucla.edu/menu/faces/main.xhtml>

Slide 26: Current Expenditure Gift Funds: UCLA Foundation (Tax ID #95-2250801)

Monetary Transfer Form (MTF):

https://medschool.ucla.edu/sites/g/files/oketem456/files/media/documents/MTF_0.pdf

Slide 27: How to Process Foundation Gifts

1. How to Process Foundation Gifts: <https://ucla.app.box.com/s/mnahz4elzwoct4952kgkfpik5ngu5znf>
2. Online Gift Transmittal Form: <https://giftsubmission.support2.ucla.edu/>
3. DOM Executive Admin Office: DOMExecutiveAdmin@mednet.ucla.edu
4. Gift Certification Form:
https://medschool.ucla.edu/sites/g/files/oketem456/files/media/documents/Gift_Certification_0.pdf
5. Foundation Office: <https://mtf.support.ucla.edu/ContactUs.aspx>
6. MTF: https://medschool.ucla.edu/sites/g/files/oketem456/files/media/documents/MTF_0.pdf

Slide 28: Gift Fund Management Tool: Financial Web Report – Consolidated Gift Fund Management

Financial Web Report: <https://fswj.ais.ucla.edu/menu/faces/main.xhtml>

Slide 29: Monetary Transfer Form (MTF) System

MTF System: <https://mtf.support.ucla.edu/>

Slide 32: Don't Forget the 700-U!

1. 700-U: <https://rpc.research.ucla.edu/coi-forms/>
2. Disclosure requirements: <https://rpc.research.ucla.edu/wp-content/uploads/coi-disclosure-matrix.pdf>

Slide 33: Gift Fund Consolidation

1. Gift fund consolidation: https://medschool.ucla.edu/sites/g/files/oketem456/files/media/documents/Gift-Consolidation_0.pdf
2. Gift fund maintenance guidelines:

https://medschool.ucla.edu/sites/g/files/oketem456/files/media/documents/Department-Gift-Fund-Maintenance-Guidelines_0.pdf

Slide 36: UCLA Endowment Minimums

UCLA Endowment Minimums: <https://www.uclafoundation.org/Resources/Endowment>

Slide 39: What is STIP?

Short Term Investment Pool Income (STIP): <https://www.adminpolicies.ucla.edu/pdf/345.pdf>

Slide 42: Google Survey Link

Anonymous Google Survey Link: <http://goo.gl/forms/C3gdjsL5y1>