

Fund Manager CT Weekly Training Session Topics

Revised July 20, 2021

- 1) **Introduction to Clinical Trials – Tuesday, July 27th**
 - 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 – Tuesday, August 3rd**
 - a) Clinical Trial Office intake
 - b) CT application checklist – internal documents
 - c) Best practices

- 3) **Pre-Award OnCore – Tuesday, August 10th**
 - a) OnCore workflow
 - b) Notifications for Fund Managers
 - c) Updating Parameters and verifying Milestones
 - d) Submitting Study Team Signoff
 - e) FAU entry

- 4) **Budgeted Costs – Tuesday, August 17th**
 - a) Understanding Cost List
 - b) Determining Study Team salaries
 - c) Ancillary recharges
 - d) Hard costs vs soft costs
 - d) Non-profit rates vs industry rates

- 5) **Post-Award Contract/Award Review – Tuesday, August 24th**
 - 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 – Tuesday, August 31st**
 - 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 – Tuesday, September 7th**
 - 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
Email DOMTraining@mednet.ucla.edu with any questions and/or registration changes/cancellations.*

All sessions are scheduled from 9:00am – 10:30am. All classes are held via Zoom*.

*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.**

