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
   e) 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.