

# Fund Manager CT Weekly Training Session Topics

Revised July 12, 2022

- 1) **Introduction to Clinical Trials – Wednesday, August 3<sup>rd</sup>**
  - 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 10<sup>th</sup>**
  - a) Clinical Trial Office intake
  - b) CT application checklist – internal documents
  - c) Best practices
  
- 3) **Pre-Award OnCore – Wednesday, August 17<sup>th</sup>**
  - 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 – Wednesday, August 24<sup>th</sup>**
  - 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 – Wednesday, August 31<sup>st</sup>**
  - 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 7<sup>th</sup>**
  - 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, September 14<sup>th</sup>**
  - 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](mailto:DOMTraining@mednet.ucla.edu) with any questions and/or registration changes/cancellations.*

All sessions are scheduled from **9:00am – 11am**. 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.**

