Fund Manager CT Weekly Training Session Topics
Revised July 18, 2023

1) **Introduction to Clinical Trials** – **Wednesday, August 2nd**
   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 9th**
   a) Clinical Trial Office intake
   b) CT application checklist – internal documents
   c) Best practices

3) **Pre-Award OnCore** – **Wednesday, August 16th**
   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, August 23rd**
   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 30th**
   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 6th**
   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 13th**
   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 for Wednesdays 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.