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.**