

Fund Manager Weekly Training Hot Topic Session Topics

Revised July 27, 2021

- 1) **Pre-Award Basics & Basic Proposal Preparation – Tuesday, September 21st**
 - a) Definitions & basic proposal structure
 - b) Types of grant submissions: New, Resubmission, Renewal, Revision
 - c) NIH grant mechanisms and standard cycle/due dates
 - d) NIH SF 424 RR. Cayuse S2S vs. NIH ASSIST
 - e) SF424 RR Application Guide, and RFAs, PAs, RFPs
 - f) Who is responsible for what (PI or FM)?
 - g) Timelines for grant submissions
 - h) Internal proposal paperwork: electronic EPASS, COIs, PI exception letters, etc.
 - i) PIs with continuous submission

- 2) **FM Basics, Systems Set Up & FM Resources – Tuesday, October 5th**
 - a) Brief overview of the UCLA accounting system
 - b) FM responsibilities
 - c) Shared drive filing systems and naming conventions
 - d) Training resources

- 3) **Reconciling F&A, Revenue Accounts, and FAU Clean Up – Tuesday, October 19th**
 - a) Understanding F&A & how to reconcile F&A
 - b) Understanding different payment mechanisms and how to review revenue accounts
 - c) FAU clean up

- 4) **Reconciliation of Non-Payroll Ledgers – Tuesday, November 2nd**
 - a) Reviewing for warning and unallowable transactions
 - b) Downloading transaction invoice details for Core Services
 - c) Identifying burn rates

- 5) **Reconciliation of Payroll Ledgers – Tuesday, November 16th**
 - a) How to reconcile payroll ledgers
 - b) Cognos CDW UCPath reports
 - c) Distribution Errors vs. Over/Under-payments vs. Benefits Adjustments

- 6) **MCOP Worksheet – UCPath Wizard (DGSOM-Specific) – Tuesday, November 30th**
(tentative)

Online Registration Form*

<https://forms.gle/Ejuhq3JqAteUb5yi7>

**Department of Medicine Fund Managers only use FAU: 441026-2X-07427-WFMT*

All sessions are 9:00 am – 10:30 am. 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.**

The image shows a screenshot of a Zoom meeting window titled "Zoom Meeting". In the top-left corner, there is a small information icon (a lowercase 'i' in a circle) and a green checkmark icon. A red box highlights the information icon, with a callout text that reads: "Click on the small information logo on the upper left corner of your Zoom window. Participant ID will be near the bottom." Below this, the meeting details are displayed for a "Personal Meeting Room". The details include: Meeting ID (899), Host, Passcode, Numeric Passcode (661870), and an Invite Link. At the bottom of the details section, the "Participant ID" is shown as 413748, which is also highlighted with a red box. At the very bottom of the window, it states "You are connected to Zoom Global Network via data centers in the United States".

Zoom Meeting

Click on the small information logo on the upper left corner of your Zoom window. Participant ID will be near the bottom.

Personal Meeting Room

Meeting ID 899

Host

Passcode

Numeric Passcode (Telephone/Room Systems) 661870

Invite Link <https://uclahs.zoom.us/j/899?pwd=QW9EQjhwZ3EyR0lDUjk0Yy8xZ0U4Zz09>
Copy Link

Participant ID 413748

You are connected to Zoom Global Network via data centers in the United States