POST-AWARD

1) **FM Basics, Systems Set Up & FM Resources** – **Tuesday, August 13**\(^{\text{rd}}\)
   a) Brief overview of the UCLA Accounting system
   b) FM Responsibilities
   c) Ordering Systems
   d) Shared Drive Filing Systems and Naming Conventions
   e) Websites: ORA, OCGA, EFM, Accounting, Purchasing, Travel, Gifts, NIH, etc.
   f) Training Resources
   g) Fund Manager Tools Quiz (Homework in preparation for Class #4)

2) **NIH Grants Management Policies** – **Wednesday, August 14**\(^{\text{th}}\)
   a) Uniform Guidance (UG): Allowable Costs, Direct vs. Indirect Costs
   b) NIH Grants Policy Statement
   c) NIH Prior Approval Requests. Federal Demonstration Partnership (FDP)
   d) Understanding the Award Snapshot & the Sponsor’s Notice of Award (NOA)

3) **FM Post-Award Tools and Reconciliation of Ledgers** – **Tuesday, August 20**\(^{\text{th}}\)
   a) School of Medicine Systems: Excel QDB & FPM
   b) Online Financial Web Reports (OFWR)
   c) ORA Portal & PI Portal
   d) Recharge Units, Online Recharge Billing Statements, Recharge Activity Report
   e) How to Reconcile Ledgers

4) **Monthly Financial Statements Using SOM’s FPM/QDB** – **Tuesday, August 27**\(^{\text{th}}\)
   a) Understanding FPM
   b) How to Prepare Monthly Financial Statements
   c) How to Create the Monthly Batch
   d) How to Create a Summary of Funds Batch
   e) Updating Benefit Projection Rates in FPM

**SKIPPING THE WEEK OF SEPTEMBER 2**\(^{\text{ND}}\)

5) **Gifts & Endowments Funds and Sales & Service Funds** – **Tuesday, September 10**\(^{\text{th}}\)
   c) How to follow up when a gift deposit has not been released by Accounting
   d) MTF Report to view last available balance
   e) Establishing a New S&S Fund
   f) Managing a S&S Fund once it has been established

6) **Payroll Topics – Staff** – **Tuesday, September 17**\(^{\text{th}}\)
   a) Bi-Weekly Issues (Funding changes, Cost Transfers, FPM/QDB projections, ERS, etc.)
   b) Payroll Calendar
   f) UCPath Basics – Funding updates and Direct Retros for Staff

7) **Payroll Topics – Faculty** – **Wednesday, September 18**\(^{\text{th}}\)
   a) Faculty Salaries – TNS, Base, Salary Scales, Z, Salary Negotiations
   b) UC Path – MCOP Worksheet, Direct Retros for Faculty
8) Effort Reporting – **Tuesday, September 24th**
   a) Effort Reporting: Basic Concepts
   b) Using UCLA’s Effort Reporting System (ERS)
   c) ORA Portal: ERS statistics. Who certified the report & why is that important?

9) Various Post Award Topics – **Tuesday, October 1st**
   a) Petty Cash Funds & Gift Cards: Policies and Considerations
   b) Human Subject Payments
   c) Purchasing Issues: Consultants, Foreign Payees, Sole Source, Prior Approval
   d) Carryforwards, Offsets, the FFR, the UCLA Holding Account (400005-8A)
   e) Stipend vs. Salary

10) Reconciling F&A, Revenue Accounts & FAU Clean Up – **Wednesday, October 2nd**
    a) Understanding F&A. How to Reconcile F&A
    b) Understanding Different Payment Mechanisms and Review Revenue Accounts
    c) FAU Clean Up

**PRE-AWARD**

11) Pre-Award Basics & Basic Proposal Preparation – **Tuesday, October 8th**
    a) Definitions and 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

12) Cayuse S2S Basics – **Tuesday, October 15th**
    a) How to prepare a grant in Cayuse S2S

13) NIH: JIT, RPPRs, & Public Access Policy – **Tuesday, October 22nd**
    a) Just-In-Time (JIT)
    b) Progress Reports – RPPRs, PMCID, Due Dates, OCGA requirements
    c) NIH Public Access Policy

14) Proposal Budget Preparation – **Wednesday, October 23rd**
    This class will be held in the BioMed Library’s Technology & Learning Center (TLC)
    12-077 CHS – 2nd floor of BioMedical Library
    After entering the library, go up the stairs immediately to the right of entrance.
    a) Budget Development
    b) NIH Detailed Budget vs. Modular Budget

15) Subaward Proposal Preparation & Management – **Tuesday, October 29th**
    a) What is a subaward, subgrant, and subcontract and how do they differ from vendor agreements/contractors?
    b) Pre-Award – Documentation needed and how to integrate a subaward into a UCLA proposal?
       i) Difference between Detailed Budget vs. Modular Budget subaward submissions
       ii) What about when UCLA is the Subawardee?
16) **Understanding Clinical Trials** – **Tuesday, November 5**\(^{\text{th}}\)  
**Guest Trainer – Clinical Trials Administration Office (CTAO)**  
- a) How do CTs differ from grants?  
- b) CT Budget Development  
- c) Coverage Analysis  
- d) CT Post-Award Issues

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**Online Registration Form**  
[http://goo.gl/forms/WM6A4Sm1H6](http://goo.gl/forms/WM6A4Sm1H6)

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

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All **Tuesday** sessions are from **8:30-11 am**.

All **Wednesday** sessions are from **8:30-10:30 am**.

All classes, except #14, are held in the Lawrence Library, 3\(^{rd}\) Floor, 32-126 Center for Health Sciences (CHS).