
Family Medicine Research Unit

Monthly Meeting - July 2022

Laura Sheehan
Manager of Research Administration, Dept. of Family Medicine

Michael Li, PhD, MPH

A Social Genomics Perspective on Social Adversity and Substance Use Disorders in Communities Impacted by HIV



Recently Processed Research Funding

PI	Award Title	Sponsor	Prime Sponsor	Action Type
Donohoe, Thomas J	Pacific AIDS Education & Training Center	UCSF	DHHS-HRSA	Continuation
Clark, Jesse Lawton	Mirtazapine for Methamphetamine Use Disorder: Drug-Drug Interaction Study	FHI 360	HELUNA HEALTH	No Cost Extension
Brooks, Ronald Andrew	Implementing HIV PrEP Among Latino Men Who Have Sex with Men and Transgender Women	USC	DHHS-HRSA	Continuation
Donohoe, Thomas J	Ending the HIV Epidemic: A Plan for America – Technical Assistance Provider	Cicatelli Associates	DHHS-HRSA	Continuation
Shoptaw, Steven J	Core Function Activities - Task Order 1	NIH-NIAAA	-	Option
Castellon-Lopez, Yelba Mariaheli	Understanding Barriers to Engagement in the Diabetes Prevention Program Among Low-Income Latino Patients: Design and Implementation of an Intervention in Community Health Centers	NIH-NIDDK	-	New
Castellon-Lopez, Yelba Mariaheli	miVacunaLA: Stakeholder Perspectives on Improving COVID-19 Vaccinations Among Vulnerable Latino Families (PHASE 3)	CHLA	-	Supplement

Recently Submitted Outgoing Proposals

PI	Title	Sponsor	Prime Sponsor	Proposal Type
Donohoe, Thomas J	The Substance Abuse Treatment to HIV Care II (SAT2HIV-II) Project	OHIO STATE UNIVERSITY	NIH	New
Gelberg, Lillian	QUIT: Targeting Opioids in Rural Settings (QUITORS)	FRIENDS RESEARCH INSTITUTE, INC.	NIH	New
Kalmin, Mariah Mattera	Reducing Overdose and Suicide Risk in Individuals with OUD and Co-occurring Disorders	RAND CORPORATION	NIH-NIDA	Resubmission - New
Tarn, Derjung Mimi	Increasing the Feasibility, Impact, and Equity of the Medicare Annual Wellness Visit	NIH-NIA	-	New
Gelberg, Lillian	Disparities in Rates & Impact of Tobacco and Marijuana Use in UCLA Primary Care	UC TRDRP	-	Supplement
Shoptaw, Steve	Clinical Trials Network Big South/West Node – Yr18 CO Request: Yr18 CTN0109A1 Study	University of Texas Southwestern Med	NIH	Supplement
Shoptaw, Steve	Clinical Trials Network Big South/West Node – Yr18 CO Request: Yr18 CTN0108 Study	University of Texas Southwestern Med	NIH	Supplement
Shoptaw, Steve	Clinical Trials Network Big South/West Node – Yr18 CO Request: Yr17 CTN0110 Study	University of Texas Southwestern Med	NIH	Supplement
Shoptaw, Steve	Clinical Trials Network Big South/West Node – Yr18 CO Request: Yr17 CTN0108 Study	University of Texas Southwestern Med	NIH	Supplement

Human Resources/Personnel



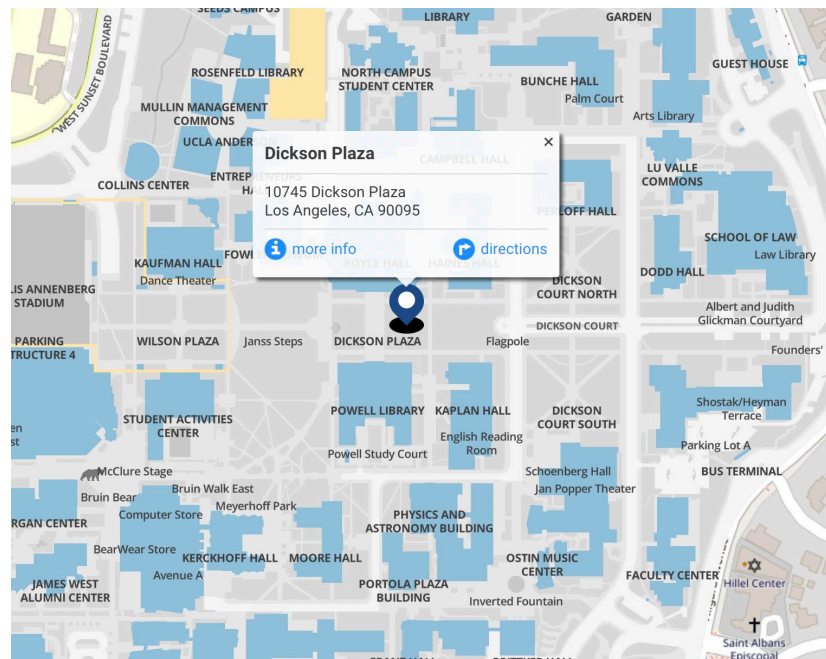
- Retirements
 - Wendy Songer, CAO – will return on recall in a few months
 - Michael Rodriguez, MD MPH – Emeritus Professor
- Departures
 - Audra Potz, Academic HR Manager – clinical position with Kaiser
 - Natalie Martinez, Gelberg Staff – going to medical school

17th Annual UCLA All-Staff Picnic

WHEN: THURSDAY, AUGUST 16

11:30AM– 1:30PM

Each year, the All-Staff Picnic brings together colleagues from across campus to enjoy a friendly, relaxing, summertime lunch sponsored by UCLA Staff Assembly and the Chancellor's Office! An invitation to all staff members will be distributed via e-mail in the coming weeks.



Get to Know Your Co-Workers

THIS MONTH'S SPOTLIGHT: CHRISTINE PARK



My family consists of my husband, toddler, and two dogs. With the addition of my toddler, Noah, we have four generations currently living! Noah's best friend is his great grandpa. When I'm not chasing Noah around, I like to garden, explore toddler friendly activities, hike, and eat. Pre-COVID, my husband and I used to go on road trips to explore the states.

Monthly Research Unit Meeting

When I started working at family medicine I had three dogs but one passed away. Currently, I have Bruce, a 10-year-old Jindo who is more of a cat than a dog, and Teddy, who is an 8-year-old miniature schnauzer who has a little dog complex.

Get to Know Your Co-Workers

THIS MONTH'S SPOTLIGHT: CHRISTINE PARK

Question: How many positions Christine has held at UCLA?

Answer: Six!

1. Conference Services Coordinator (intern)
2. Special Projects – Conferences, Catering, & Marketing
3. Special Projects – Food & Beverage operations (on campus housing and Luskin Conference Center)
4. Executive Assistant to Director of University Apartments
5. Senior Fund Manager at School of Education and Information Studies
6. Senior Fund Manager with Family Medicine.

Financial

- **Ordering Process**
 - PO Request Form
 - Payment Works
 - Transcepta
 - Invoicing and Payment

Financial Process



Requester: The person who needs the item or is requesting the item for someone on their team. The Requester determines what needs to be purchased and from which vendor. This person will complete most of the forms for submission to the Authorizer.

Types of request forms:

- PO Request Form
- Independent Contractor/Consultant Checklist and attachments
- Travel/Entertainment Reimbursement Form
- Mileage Reimbursement Form
- Foreign Wire Transfer Request Form
- Check Request Form

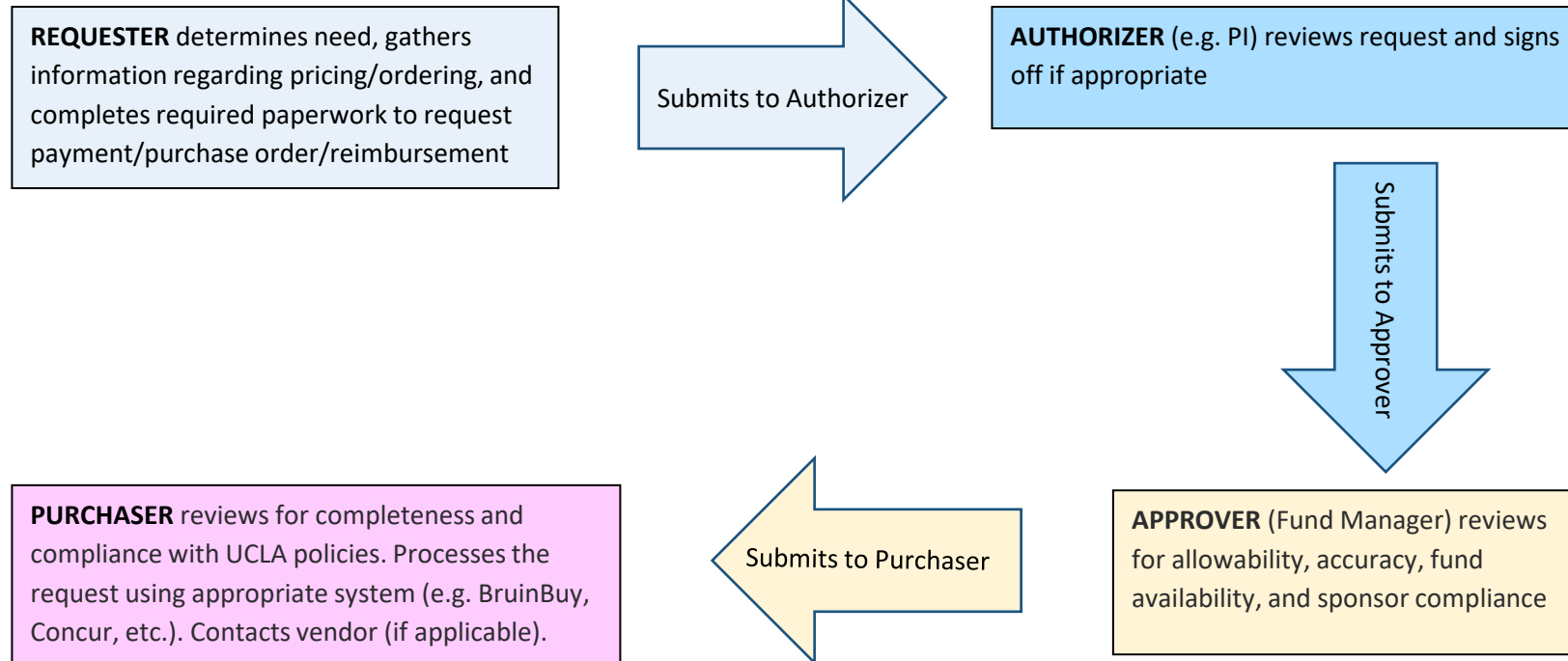
Submits the request form(s) to Authorizer (e.g. PI) for approval and signature.

Financial Process



The vendor should not be providing any goods or services at this time in the process. Submitting a PO Request Form is NOT the same thing as creating or having a PO (purchase order), and a PO must be in place in order for work to begin or for services/deliverables to be provided.

Financial Process



Financial Process

What Used to Happen:

1. Valencia created a PO in BruinBuy
2. The vendor was contacted with the PO # and the order was placed/work began
3. The item would be delivered or work completed
4. The vendor would send an invoice to the Requester or to Valencia
5. The Requester or Valencia would make sure the PO # was on the invoice and would then submit it to Accounts Payable (AP) to be paid
6. Accounts Payable would receive the invoice, match it up with the PO #, and if approved, they would cut a check and send it to the vendor

Financial Process

What happens now:

1. Vendor must register with PaymentWorks
2. Vendor must enroll in Transcepta (some exceptions)
3. Then Valencia can create a PO
4. The item can then be ordered/delivered or work completed
5. The vendor submits their invoices directly to Transcepta, listing the PO
6. AP reviews the invoices and, if approved, pays the vendor using their preferred method of payment

Financial Process

The following vendor types are exempt from the new process/Transcepta:

- Vendors for goods and services reviewed by UCLA Travel & Entertainment Accounting (e.g., catering, lodging, or air transportation vendors)
- Foreign and nonresident vendors
- Utility vendors
- Federal/State agencies
- Subcontract and subaward vendors (e.g., G & S class orders)
- One-time payees (e.g., honorarium recipients, guest speakers, and human subjects)

Financial Process

PaymentWorks

(Required if vendor is not already registered)

1. Requester is responsible for providing the vendor's email when completing PO Request Form.
2. Valencia emails vendor to initiate the process and send an invitation to register.
3. Vendor submits their information directly into PaymentWorks.
4. PaymentWorks verifies and validates the vendor's submitted details.
5. Vendor information is routed to UCLA Vendor Management Team for review and approval.
6. Vendor Management will then assign the vendor's ID/number (e.g. VCK).

This process can take 2-4 weeks. Valencia can utilize the Onboarding Tracker to see where a vendor is in the process, but she is not responsible for any of the steps except #2 above. She cannot create a PO # until the VCK is created. Vendors also need to make a payment method selection.

Financial Process

Transcepta

(UCLA's electronic invoicing submission platform)




1. Vendor must enroll. This is a separate process from PaymentWorks, which must already be completed.
2. After enrollment, vendors will submit their invoices directly to Transcepta to get paid
3. Vendors must include the appropriate PO# on their invoices otherwise they will not get paid
4. You must still submit PO request forms to create PO numbers! Vendors should not be providing goods or services without a (new) PO #.
5. If you have a recurring charge/vendor who will be providing the same thing on a regular basis, you may wish to create a “blanket PO” that will allow more than one invoice to charge to the same PO. But you are responsible for reviewing ledgers/invoices to make sure the PO has enough funds to cover all invoices and to close it out when done.
6. Remember, don't use this system for utility invoices or subaward invoices.

Financial

- **Justifications (for purchases or travel/entertainment)**

- Need to be detailed and understandable to a lay person
- Explain what you are paying for and why the listed FAU is the appropriate funding source

Examples:

1. "For Invoice #348-91 on the HLC project" 
 2. "For consulting services during Year 3 of the Bruin Research Project study, as listed in our budget justification (attached)." 
 3. "General office supplies for the Oppenheimer research office" 
- A. Might be OK, depends.
 - B. Dude, no.
 - C. Good to go.

Financial

- **Object Codes**

- 4-digit code
- Used for classification and tracking
- You are responsible for selecting the correct object code, but we can help
- Use <https://ga.accounting.ucla.edu/> to help you find the right one

Financial

• UPS vs. FedEx

UPS rates for most services have increase from the old agreement to the new agreement. UPS average projected increases are as follows:

- Next Day Air: 32% increase from old agreement to new agreement
- 2-Day Air: 41% increase from old agreement to new agreement
- Ground: 66% increase from old agreement to new agreement

Please start shifting business to FedEx, as the FedEx systemwide contract rates are superior to UPS list rates:

- Next Day Air: FedEx is (on average) 17% less expensive than UPS
- 2-Day Air: FedEx is (on average) 10% more expensive than UPS
- Ground: FedEx is (on average) 38% less expensive than UPS



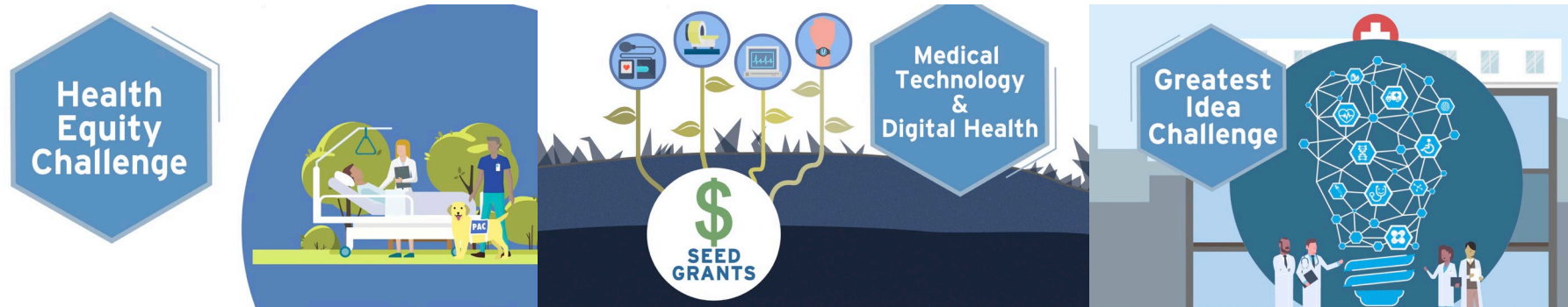
UCLA Health Innovation Challenge

UCLA Health invites our community members to join our mission, as we search for the next great idea, from novel medical devices to optimizing patient experience. The UCLA Health Innovation Challenge invites applications from faculty, staff, trainees, students, patients, caregivers and volunteers seeking to advance long-lasting health and equitable care.

Choose from three different challenge tracks: **Scale Health Equity**, **Invent HealthTech**, and **Submit Your Greatest Idea**. Watch this [video](#) to learn more. Prizes include support of up to \$50,000 in seed funding.



UCLA Health Innovation Challenge: Three Tracks



This track invites solutions tackling challenges related to equitable care delivery, socio-structural drivers of health, and optimal health outcomes for individuals from vulnerable and marginalized populations. **Awards up to \$50,000.**

The healthtech track seeks value driven solutions across the patient journey, including **medical devices, diagnostics, digital therapeutics and other digital health or software solutions**. Basic science funding requests are encouraged to apply to the [David Geffen School of Medicine Seed Grant Program](#). **Awards up to \$50,000.**

Applicants can submit ideas across the continuum of health care delivery. From patient experience and community outreach to process improvement and clinical workflow to financial stability and operation & decision support. **Awards vary, and may include prizes, recognition and/or funding.**

NIH Updated Biosketch and Other Support Disclosures Table

Type of Activity	Biographical Sketch	Other Support	Annual Project Reports	Post-Award Information Terms & Condition	Disclosure Not Required
Professional preparation (e.g., educational degrees)	X				
Organizational Affiliations and Appointments	X				
Academic, professional, or institutional appointments, whether or not remuneration is received, and whether full-time, part-time, or voluntary	X				
All projects currently under consideration from whatever source, and all ongoing projects, irrespective of whether support is provided through the proposing organization, another organization or directly to the individual, and regardless of whether or not they have monetary value (e.g., even if the support received is in-kind such as office/laboratory space, equipment, supplies, or employees.)		X	X	X	
Recently completed support or support that has ended					X
Current or pending participation in, or applications to, programs sponsored by foreign governments, instrumentalities, or entities, including foreign government-sponsored talent recruitment programs	X (Appropriate placement may be contract-dependent)	X (Appropriate placement may be contract-dependent)			
In-kind contributions not intended for use on the project/proposal being proposed		X	X	X	
Visiting Scholars in Labs funded by an external entity		X		X	
Students and postdoctoral researchers funded by an external entity		X	X	X	
Consulting that falls outside of an individual's appointment; separate from institution's agreement		X	X	X	
Consulting that is considered part of an individual's appointment/agreement with their home institution (e.g., a PI at a foreign institution's retention contracts within their home institution)					X
Travel supported/paid by an external entity to perform research activities with an associated time commitment		X	X	X	
Travel supported/paid by an external entity to attend a conference or workshop					X

NIH Updated Biosketch and Other Support Disclosures Table

Type of Activity	Biographical Sketch	Other Support	Annual Project Reports	Post-Award Information Terms & Condition	Disclosure Not Required
Honoraria or other payments given for the purpose of conferring distinction or to symbolize respect, esteem, or admiration unrelated to research oversight, supervision, or co-authorship					X
Teaching commitments					X
Startup company based on organization-licensed Intellectual Property (IP)					X
Startup packages provided to the individual from the proposing/home institution					X
Startup packages from organizations other than the proposing/home institution		X	X	X	
Training awards, prizes, and gifts. Gifts are resources provided where there is no expectation of anything, (e.g., time, services, specific research activities, money, etc.) in return					X
Mentoring as part of an appointment, or mentor/mentee arrangements that do not involve the individual's research activities					X
Academic year salary, or salary provided to the individual by the home institution					X
Core facilities and/or shared equipment that is broadly available					X
F&A Reimbursement provided to the proposing/home institution					X
Certification by the individual that the information disclosed is accurate, current, and complete (e.g., signature of the researcher)		X	X		
Supporting Documentation (e.g., contracts, grants, other agreements)		X			
Significant Financial Interests: Disclosure Not Required in Other Support. See NIH FCOI Policy NIH GPS 4.1.10 . Disclosures must be made in FCOI module.					X

Meetings

- Next Monthly Research Unit Meeting: Thursday, August 4
- Prior monthly meeting agendas/slides are now available on the [website](#)

UCLA Health Family Medicine

Research

For Family Medicine Research Unit Employees

Here are some commonly needed documents/forms for Department of Family Medicine Research Unit employees. If you have any questions or do not see the form you require, please contact Laura Sheehan, Manager of Research Administration at LSheehan@mednet.ucla.edu.

TRAINING/HOW-TO GUIDES:

- [Information Sheet for New Fam Med/Diaperheim Suite Employees](#)
- [Travel/Entertainment/Food Reimbursement Request Guide](#)
- [Purchase Guide](#)
- [Accounts Payable Training](#)
- [Purchase Pledge Card](#)
- [Post Award Training](#)
- [Effort Reporting Guide](#)

FORMS:

- [Department and Anti-Lobby Certificate](#)
- [Facilities and Resources Page for Proposals \(Family Medicine\)](#)
- [Research Write Transfer Requests \(Fam Med Res Unit\)](#)
- [Independent Contractor/Consultant Checklist](#)
- [Misuse Form \(Fam Med Res Unit\)](#)
- [Outlines from At Your Service Catering](#)
- [Proposal Intake Form \(Fam Med Res Unit\)](#)
- [Purchase Order Request Form \(Fam Med Res Unit\)](#)
- [Request for Gift Cards \(non-human subjects and non-employees only\)](#)
- [Subawards - Required Information for Proposals](#)
- [Travel and Entertainment Reimbursement Request Form \(Fam Med Res Unit\)](#)
- [Linking for your department and enabling your Check out the Accounts Payable website for forms like Check Requests, Petty Cash Expenditures, VRS templates, and more.](#)

MONTHLY RESEARCH UNIT MEETING SLIDES AND AGENDAS:

- [June 2022 Research Unit Meeting](#)
- [May 2022 Research Unit Meeting](#)
- [March 2022 Research Unit Meeting](#)
- [February 2022 Research Unit Meeting](#)
- [December 2021 Research Unit Meeting](#)

Thank You
