UCLA David Geffen School of Medicine

# Family Medicine Research Unit Monthly Meeting - September 2022

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

# Recently Processed Awards

| PI | Award Title | Sponsor | Prime Sponsor | Action Type |
|---|---|---|---|---|
| Donohoe, Thomas J | Pacific AIDS Education & Training Center | UNIVERSITY OF CALIFORNIA, SAN FRANCISCO | DHHS-HRSA | Continuation |
| Shoptaw, Steven J | Technology Improving Success of Medication-Assisted Treatment in Primary Care | Q2I LLC | NIH-NIDA | No Cost Extension |
| Brooks, Ronald Andrew | Evaluating the Feasibility and Acceptability of a Latino MSM Focused PrEP Uptake Intervention | NIH-NIMH National Institute of Mental Health | - | Continuation |
| Sur, Denise Kc | CalMedForce State Funded Grant | Physicians for a Healthy California (formerly California Medical Association Foundation) | UCOP | Continuation |
| Nattiv, Aurelia | Screening for Sexual Violence Among College Athletes | AMERICAN MEDICAL SOCIETY FOR SPORTS MEDICINE (AMSSM) | - | New/Transfer |
| Donohoe, Thomas J | Pacific AIDS Education & Training Center | UNIVERSITY OF CALIFORNIA, SAN FRANCISCO | DHHS-HRSA | Continuation |

# Recently Submitted Proposals

| PI | Title | Sponsor | Prime Sponsor | Proposal Type |
|---|---|---|---|---|
| Shoptaw, Steven J | CTN-0110 Randomized, double-blind, placebo-controlled trial of monthly injectable buprenorphine (BUP) for methamphetamine (MA) use disorder (MURB) | University of Texas-Southwestern Medical Center at Dallas | NIH | New |
| Moreno, Gerardo | CMSP Path to Health Pilot Phase 2 Evaluation | County Medical Services Program | - | New |
| Nattiv, Aurelia | Improving Bone Health and Reducing Incidence of Bone Stress Injuries in Pac-12 Distance Runners: An Implementation Plan Focusing on Health Promotion, Optimal Fueling, and Changing Culture | UCSF | Pac-12 | Modification/ Supplement |

# Human Resources/Personnel

Gerardo Moreno, MD, MSHS, appointed as Chair of the Department of Family Medicine, effective August 1, 2022

| | |
|---|---|
| Number of JEDI Projects: | 36 |
| Total $ Award Amt of all JEDI Projects: | $13,013,508 |
| Percentage of JEDI projects for which Fam Med is the primary dept/ Lead PI: | 67% |

Dr. Yelba Castellon-Lopez named Director of JEDI for Department of Family Medicine

# COVID Updates

We are aware that there is confusion about the latest COVID policies, and there is conflicting guidance.

Until we receive further guidance from DGSOM, we have been instructed to stay the course.

# DGSOM COMMUNITY SOCIAL

OPEN TO ALL DGSOM **STAFF – FACULTY – STUDENTS – TRAINEES**

**Date:** Thursday, September 15
**Time:** 12:30 – 2 p.m.
**Location**: Geffen Hall Revive Patio
**Deadline to Register:** Tuesday, September 6
**Registration Link:** https://uclahs.az1.qualtrics.com/jfe/form/SV_blRvwGBz9sQTYXQ

**This event is a great opportunity to:**
•(Re)connect with colleagues from across the organization
•Welcome new team members to the DGSOM community
•Celebrate team accomplishments
•Recognize colleagues for exemplifying the **Cultural North Star** in their work, actions, and interactions
•Make a personal pledge to embed the **Cultural North Star** into your daily practices within DGSOM

*Supervisors are encouraged to grant employees sufficient release time in addition to their normal lunch period to join this community building event, provided that the absence would not infringe upon the performance of required job duties.*

# Monday, September 5th is Labor Day

# Research Updates

- **New guidance requires federally-funded research to be Open Access**
  - OSTP Guidance calls for federal agencies to make taxpayer-supported research publicly available immediately (removes optional 12-month embargo)
  - Requires that underlying data be published
  - Federal agencies have until end of 2025 to institute guidance

https://www.whitehouse.gov/wp-content/uploads/2022/08/08-2022-OSTP-Public-Access-Memo.pdf

*"Lifting the yearlong embargo that some journals have imposed on papers they publish will promote more equitable access to research… The previous policy 'limited immediate equitable access of federally funded research results to only those able to pay for it or have privileged access through libraries or other institutions.'"*

# Monthly Meetings with Fund Manager

Are they actually required?

# Monthly Meetings with Fund Manager

## New Funds

- Compare budget with snapshot
- Discuss changes, timing of anticipated expenses
- Approve/initiate transfers, subaward set-ups, etc.

*Are sister departments/subawards performing as expected? Are they spending down/invoicing?*

*Is the project making progress as expected? If not, is carryforward/NCE necessary/allowed?*

## Existing Funds

- Review financial reports (aka FR's, GL)
- Ensure that recorded expenses are allowable, applicable, complete
- Determine if adjustments need to be made
- Review encumbered items
- Monitor spending rate

*Is the effort being charged for personnel accurate? Does it need to change in the upcoming months?*

*Is that charge applicable? Are there any applicable charges missing? Why is that item still encumbered?*

# Managing Subawards

- Coordinate with fund manager for set-up
- Ensure that subs are providing expected deliverables
- Insist that subs invoice in a timely manner
  - New, more stringent close-out policies demand that subs invoice in a timely manner, especially for final invoices
  - Consider listing subaward end dates PRIOR to project end date when setting up subs
  - Warn subs that failure to invoice on time = no guarantee of payment

# Get to Know Your Co-Workers

- My favorite things to do: sketch, photography and travel
- Four things I can't do without: God, family, sleep and my hydro flask
- Top 2 movies of all time:
  - My favorite Disney movie is *The Lion King*, I re-watch it every chance I get, and can recite lines (BUT I refuse to watch the new Lion King – I don't want to ruin my favorite memories!)
  - *Lean on Me*! I know the lines in this movie and rewatch Youtube clips at random.
- I have one lovely pet, Nahla, who is 12 yrs old
- Bucket list: Do a W. Africa tour and skydive!
- I studied biology at UCSD, and Global Health at Northwestern University (Masters)

# Get to Know Your Co-Workers

## DAMI JOLAYEMI

**5 Truths and 1 Lie**

A. In my first job, I doubled as a cashier and pizza cook (skilled in pizza tossing).
B. I have 4 sisters and 1 brother
C. I used to teach elementary school
D. I went to an all-girls boarding school
E. I run my own wedding/event planning business

# Financial Process

- Clarification on **Paying Guest Speakers/Panelists** (as well as CAB and SAB members)
  - Discuss process prior to offer (will need to register with Payment Works)
  - ~~Submit paperwork in advance~~
  - Best practice: do not offer pay to UC employees
  - Use the Check Request Form, not PO Request Form
  - Eligible for coverage under blanket waiver for insurance

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# Check Request Form

| ORDER NUMBER (P.O.) | | |
|---|---|---|
| FS DEPT | CLASS | SEQ. NO. |
| | | |

| AGREEMENT NUMBER | | |
|---|---|---|
| | | |

| NAME OF PERSON TO CONTACT | DEPT. NAME | TELEPHONE | DATE |
|---|---|---|---|
| | | | |

| LOC | ACCOUNT | CC | FUND | PROJECT | SUB | OBJECT CODE | SOURCE | AMOUNT |
|---|---|---|---|---|---|---|---|---|
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |

VENDOR OR PAYEE

Name:

Address:

Email:

Location where service was provided:

| TEL # | |
|---|---|
| FAX # | |
| FED. TAX ID (No SSNs) | |
| | |

IS PAYEE A UC EMPLOYEE?

YES ☐ NO ☐

CALIFORNIA RESIDENT?

YES ☐ NO ☐

(Payment will be made via the payment method that the payee selects during PaymentWorks registration. If paper check was selected, check will be mailed to the address entered into PaymentWorks)

**BILL TO ADDRESS:**

UCLA ACCOUNTS PAYABLE
10920 WILSHIRE BOULEVARD, 5TH FLOOR
LOS ANGELES, CA 90024-6502
TEL: 310/794-0197

***Section 1:***

| QUANTITY | UNIT | CATALOG NO./DESCRIPTION | UNIT PRICE | EXTENDED PRICE |
|---|---|---|---|---|
| | | | | 0.00 |
| | | | | 0.00 |

## INSTRUCTIONS:

- Use this form to request payment for a guest speaker, Community Advisory Board (CAB) member, or Scientific Advisory Board (SAB) member.
- After-the-fact payments are allowable.
- Complete all sections highlighted in yellow. Location where service was provided is required, do not leave it blank.
- If the vendor/payee is new (not registered with PaymentWorks), Valencia will initiate the registration process. Be sure to include their email on this form. Payees must follow the instructions emailed to them in order to register with PaymentWorks. (Payees should only have to register once).
- Guest speakers, CAB, and SAB payments do not require insurance. If this request is for another type of service, please clarify that in the justification section so that an insurance waiver can be requested, if required.
- The PI should sign the Check Request Form.

# Independent Contractors/Consultants

# Independent Contractors/Consultants

☐ This purchase is **$10,000 or more** (or $100,000 or more if non-federally funded) and we have completed at attached the **Source Selection and Price Reasonableness Form (SSPR)**

You should complete all sections of the SSPR that apply for "Sole Source" justification. If this purchase does not qualify for Sole Source, Purchasing will use the SOW to seek competitive bids. **If this purchase is $250,000 or more**, you will also need to attach the Small Business Solicitation Form.

Revised 8/31/2022

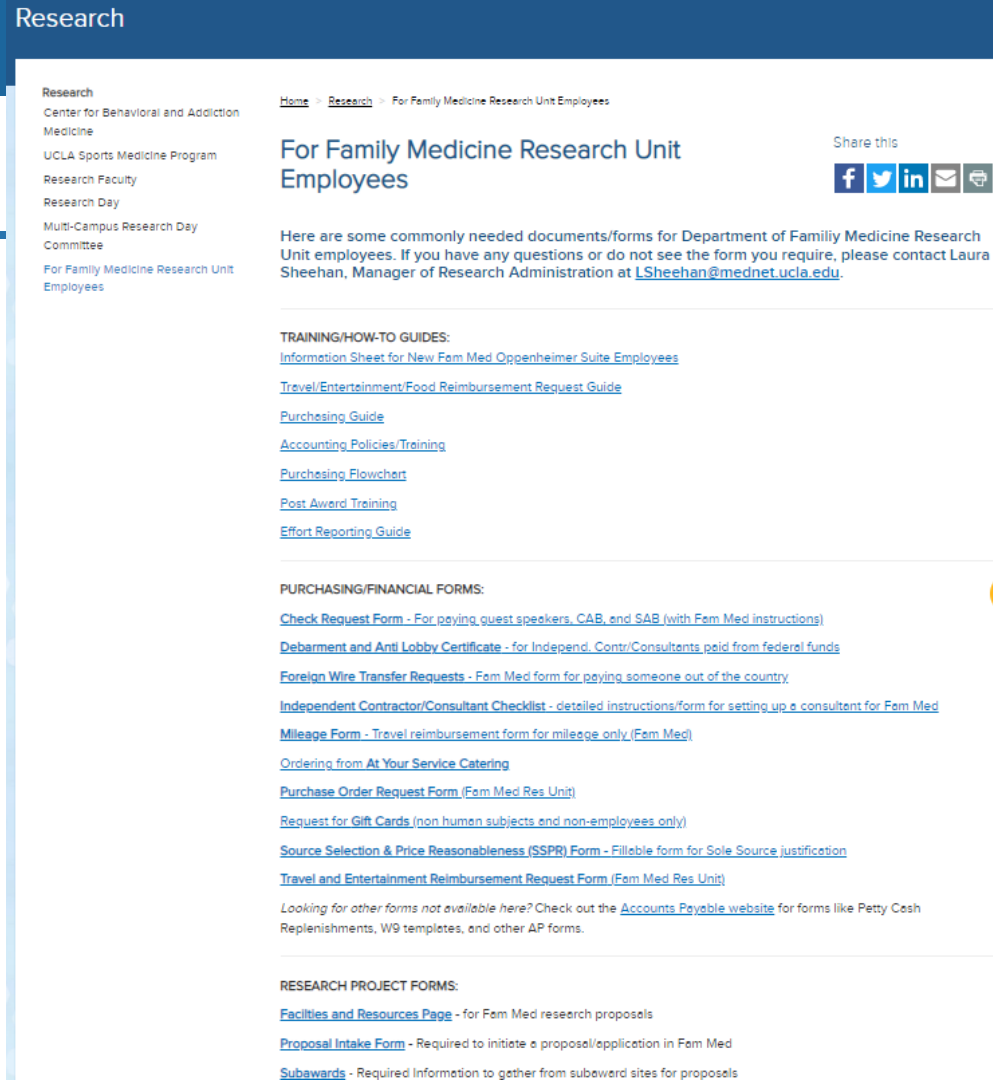
**11. Are any of the following applicable? If yes, the Purchaser will include a comment in the requisition stating that this purchase is exempt from SBF restrictions for the following reason:**

- ☐ This is federally-funded
- ☐ The vendor is providing a unique professional service
- ☐ One of the exemptions listed here is applicable. List the exemption: _____

**OR**

- ☐ None of the above exemptions are applicable. I have therefore reviewed the Small Business First Program website and complied with all instructions. I have attached all relevant documentation to this request.

# Website


Research
Research
Center for Behavioral and Addiction Medicine
UCLA Sports Medicine Program
Research Faculty
Research Day
Multi-Campus Research Day Committee
For Family Medicine Research Unit Employees
Home > Research > For Family Medicine Research Unit Employees
For Family Medicine Research Unit Employees
Share this
Here are some commonly needed documents/forms for Department of Familiy 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 Oppenheimer Suite Employees
Travel/Entertainment/Food Reimbursement Request Guide
Purchasing Guide
Accounting Policies/Training
Purchasing Flowchart
Post Award Training
Effort Reporting Guide
PURCHASING/FINANCIAL FORMS:
Check Request Form - For paying guest speakers, CAB, and SAB (with Fam Med instructions)
Debarment and Anti Lobby Certificate - for Independ. Contr/Consultants paid from federal funds
Foreign Wire Transfer Requests - Fam Med form for paying someone out of the country
Independent Contractor/Consultant Checklist - detailed instructions/form for setting up a consultant for Fam Med
Mileage Form - Travel reimbursement form for mileage only (Fam Med)
Ordering from At Your Service Catering
Purchase Order Request Form (Fam Med Res Unit)
Request for Gift Cards (non human subjects and non-employees only)
Source Selection & Price Reasonableness (SSPR) Form - Fillable form for Sole Source justification
Travel and Entertainment Reimbursement Request Form (Fam Med Res Unit)
Looking for other forms not available here? Check out the Accounts Payable website for forms like Petty Cash Replenishments, W9 templates, and other AP forms.
RESEARCH PROJECT FORMS:
Facilties and Resources Page - for Fam Med research proposals
Proposal Intake Form - Required to initiate a proposal/application in Fam Med
Subawards - Required information to gather from subaward sites for proposals

# Financial – Upcoming Guidance

- Supplier Site Orders (catalog orders)

| | | | | |
|---|---|---|---|---|
| Abcam | Agilent Technologies | Airgas | ASUCLA | Aventri Inc. |
| AVI-SPL | Bio-Rad | CDW-G | Cell Signaling | Fastenal (Merced only) |
| FedEx | Fisher Scientific | GE Healthcare | Gorilla Marketing | Grainger |
| Graybar | Guy Brown | HD Supply | Krueger International (KI) | KST Data |
| Main Street Technologies (Merced only) | McKesson Medical Surgical | Millipore Corp | Miltenyi Biotec | Neta Scientific |
| New England BioLabs, Inc. | Newark Electronics | Office Depot | Omega Scientific | Praxair |
| Qiagen | Rainin | RICOH USA INC | Roche | Sigma Aldrich |
| Spectrum Chemicals | Tangram | The Castle Press | Thermo Fisher Scientific Life Science Group (Formerly Life Technology) | Unisource |
| VWR | Waxie | Xerox | | |

# Financial – Upcoming Guidance

- Blanket Agreements – explanation and guidance
- New Travel/Entertainment guidance
- New PO Request Form

# P2P Transformation Project

- Procure-to-Pay
- New Procurement system: JAGGAER
  - Replaces BruinBuy, Vendor Invoice Portal, AP Portal, and PAC
  - Will integrate with Oracle (Ascend)
  - To be launched in 2023

# Implementation Approach

To immediately realize the benefits of updated business processes and a new system, the P2P Solution will be implemented in two releases as outlined below:

## P2P Transformation Workstream

### Release 1: P2P Software utilizing FAU with legacy systems

*Est. 2023*

- New platform will **be used to procure all goods & services**
- **Business processes** remain the same
- **Rapid timelines** to ensure timely delivery of solution and maximize benefits to campus
- **Integrations** with current systems
- Requires **upfront data cleanup**
- Requires **training** for user community

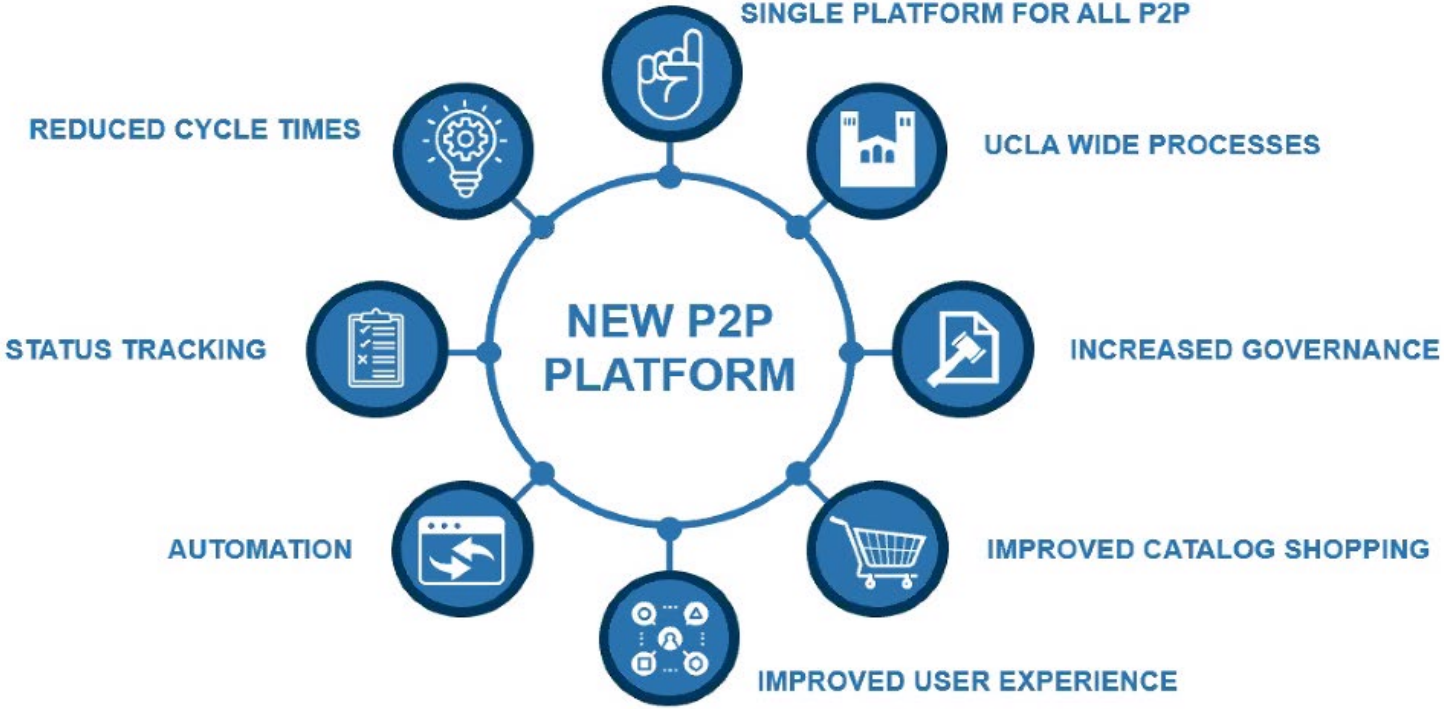
### Release 2: P2P Software utilizing new CoA with Oracle

*TBD (Dependent upon Oracle Restart)*

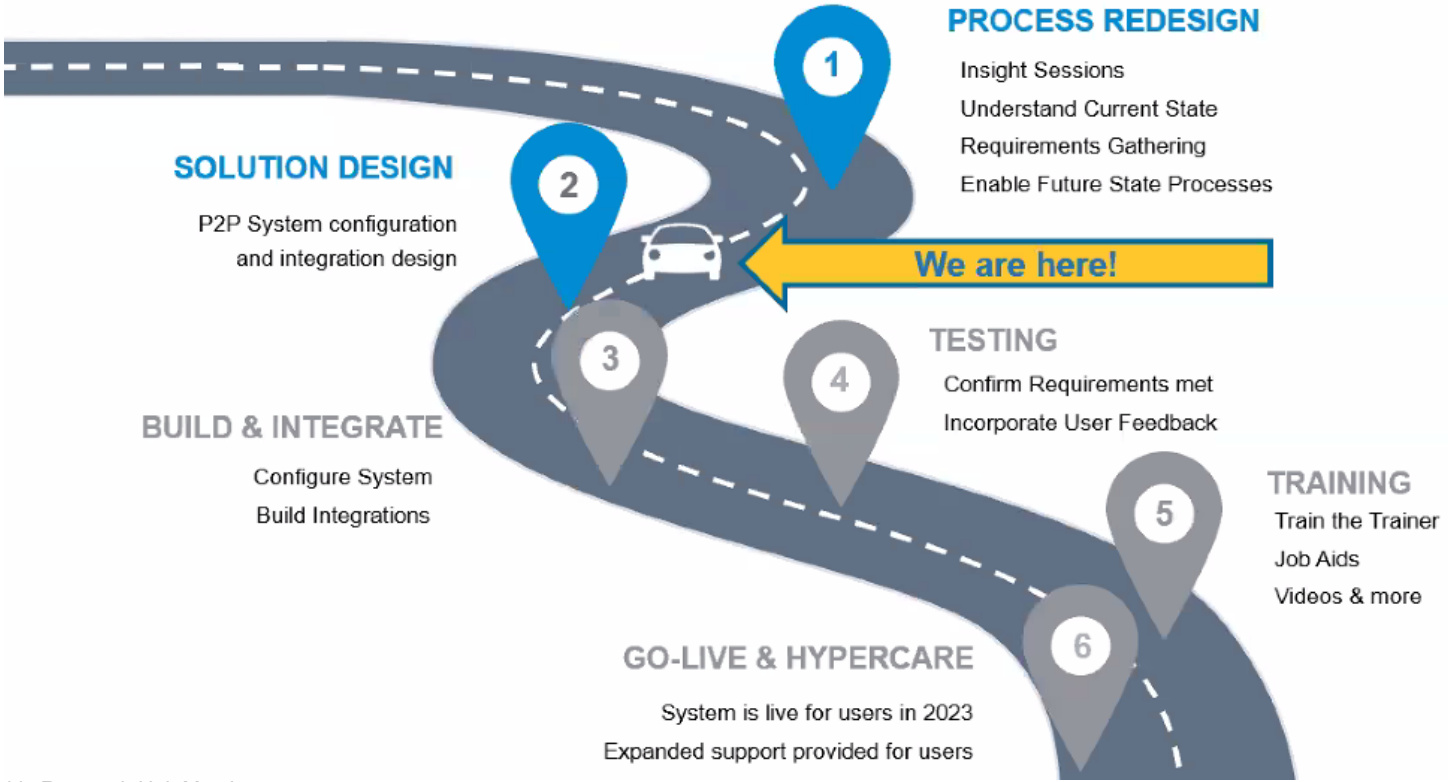
- Will be **scheduled concurrently with Oracle Go-Live**
- Includes **adoption of additional P2P functionality**
- Includes **full integration with Oracle** and other systems
- Includes **additional P2P training** and **new Oracle training**
- PAC archives/retires

# P2P Solution Benefits

This transformation will equip UCLA to realize the following benefits:



# P2P Project Roadmap



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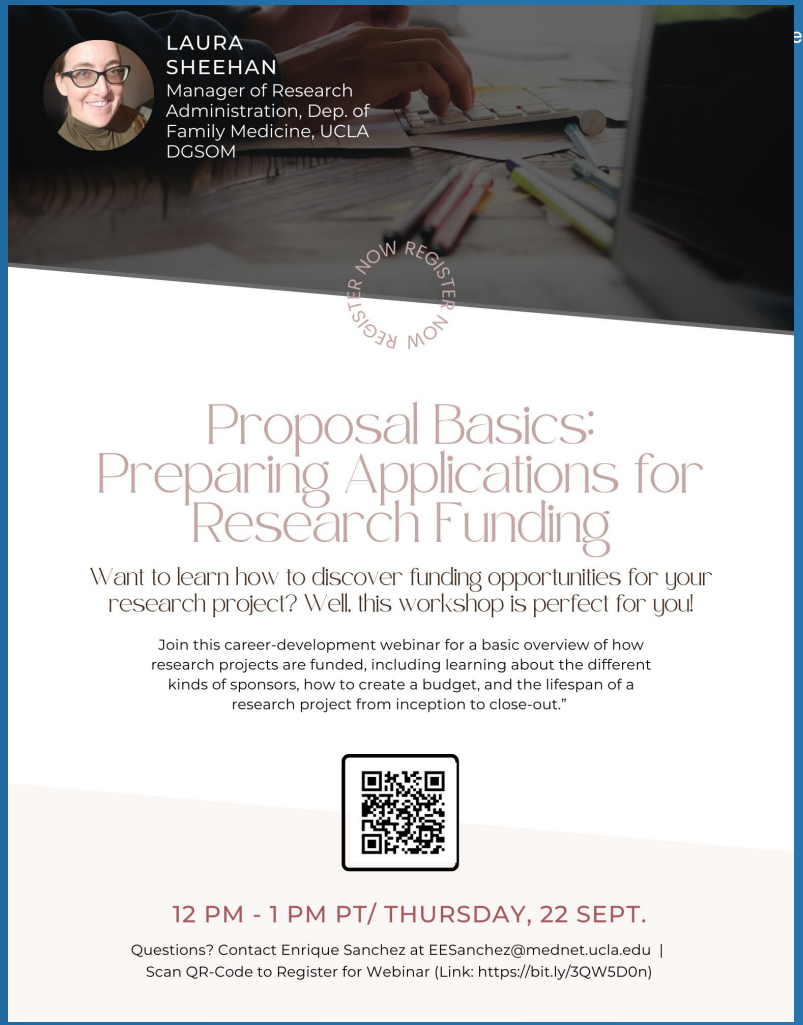
# Meetings/Events

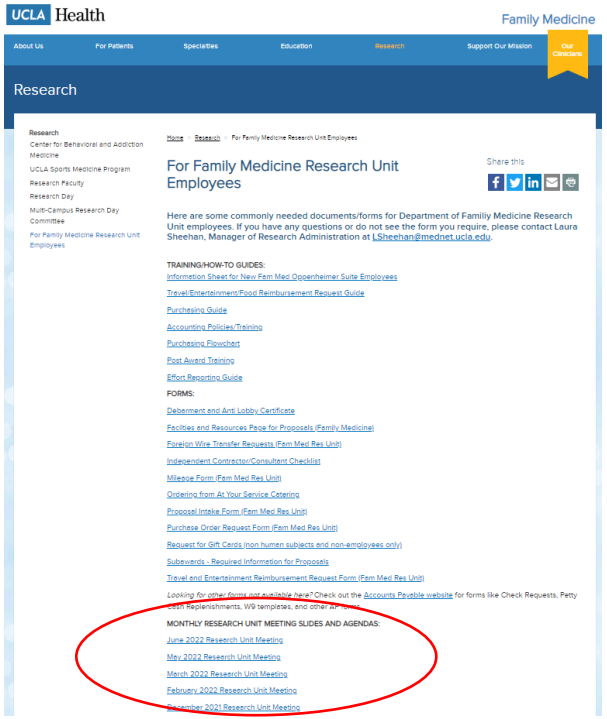
- **Proposal Basics: Preparing Applications for Research Funding**
- Thursday, September 22, 2022 from 12:00PM – 1:00PM
- Registration is free



# Meetings/Events

- Next Monthly Research Unit Meeting: Thursday, October 6

- Prior monthly meeting agendas/slides are available on the website



# Thank You