Recently Submitted Proposals / Processed Awards

Upcoming Holidays

Monday, May 27

Shoptaw – Kneller Chair

Congratulations!

Performance Evaluations

- Final evaluations with both manager and employee signatures for all union-represented employees are due to HR on May 6

- For career staff in non-represented, non-academic positions:
  - Managers should have submitted evals for Leadership review already. If not: must be submitted ASAP.
  - Managers will get calibrated reviews back after May 12.
  - Managers should meet with employees to review/sign off between May 12-June 9.

Employee Engagement Survey Results

THE VOICE

What is one thing UCLA Health (or your direct manager) can do to support your professional growth and development?

7,992 Answers   **78,168** Votes

UCLA Health | David Geffen School of Medicine

Employee Engagement Survey Results

#1 - UCLA can do a better job at **compensating current (long-time) employees according to industry standards**. When current employees get promoted to a new role, even if within a completely new department, UCLA insists on giving percentage raises relative to their current salary, whereas they would pay someone hired from outside UCLA a much greater compensation rate.

#2 - COLA at UCLA Health is woefully **out of step with the realities of unprecedented recent inflation** and LA metro cost of housing at historic highs. All but the highest earners are struggling to make ends meet and a 4.5% pay adjustment is frankly insulting. UCLA should provide a retroactive 15% raise to all employees to account for inflationary pressure on costs of living AND publicly acknowledge the hard work and exceptional dedication of staff, not just those in upper management and c-suites.

#3 - Pay raise to **match the cost-of-living increase** vs 4% increase.

#4 - UCLA Health could **provide more realistic raises**. The cost of living is entirely too high to think a 4-6% raise makes a difference every year.

#5 - **A promotion/title change, and salary increase to align with increased responsibilities** and workload would be helpful.

Employee Engagement Survey Results

Dominant Themes from Comments

1. Recognition and Acknowledgment
2. Professional Growth and Development
3. Supportive Management
4. Flexibility and Work-Life Balance
5. Communication and Transparency
6. Fairness

Research Day

- In-person at the California Endowment downtown

- Wednesday, May 22, 2024; 11:30a-4pm

- Keynote Speaker: Dr. Tony Kuo

- Contact Authors should have received acceptance letters and instructions for posters/lecterns

- Visit website for more info: https://www.uclahealth.org/departments/family-medicine/research/research-day

Please RSVP by May 7!

May Grand Rounds

Friday, May 24, 2024

12:00pm-1:00pm

Dr. Kurt Stange

How Family Medicine and Primary Care Contributes to Population Health

FAMILY MEDICINE

Grand Rounds Presentations

Family Medicine

About Us ➕

Education ➕

For Patients

Our Clinicians

Research ➕

Specialties ➕

Grand Rounds Presentations

UPCOMING:	**Lecturer/Topic**
March 22, 2024	**Ruchi M. Fitzgerald, MD, FAAFP** Assistant Professor, Depts of Family Medicine and Psychiatry/Behavioral Sciences at Rush University Associate Program Director, Rush University Addiction Medicine Fellowship Service Chief of Inpatient Addiction Medicine, PCC Community Wellness Center **Topic: The Project LIFE Program: Long Acting Injectable Buprenorphine to End Overdose Opportunities for Addressing Equity in Substance Use Disorder Treatment in Overlooked Populations** Flyer

Date	**Lecturer/Topic**
February 23, 2024	**Bruno Lewin, MD, DTMH** Chair, Regional Immunization Practice Committee Director, Travel Advisory Service LAMC Core Clinical Faculty, Department of Family Medicine KaiserPermanenteLosAngelesMedicalCenter **Topic: Global Health is Local Health - Latent TB, Hepatitis B, and Chagas Disease** Flyer

Date	**Lecturer/Topic**
October 27, 2023	**Theodore C. Friedman, MD, PhD** Chairman, Department of Internal Medicine Charles R. Drew University of Medicine & Science

Grand Rounds Website is now live (with speaker/topic information, flyers, and selected slide decks)

Research Faculty Meet the Residents

- Wednesday, July 17, from 8-11am

  o Faculty are required to attend, or send proxy

  o Opportunity to meet the residents, introduce yourself and your research foci

  o Each faculty member will have approximately 10-15 mins; PowerPoint optional

  o RSVP to Laura and let her know which time slot you prefer

  o Will be conducted via Zoom

Fund Manager Updates – The Bad News

Hi!

Bye!

Lois Hernandez, our brand new fund manager who started April 1, was just offered her dream job and will be leaving us May 19.

If you have any urgent fund manager needs, please work with her over the next two weeks to get as many issues resolved as possible.

Pediatrics is also experiencing a fund manager shortage and will not be able to assist as they did previously.

Fund Manager Updates – The Good News

We already had a 2nd Fund Manager position posted, and we are already conducting interviews.

We hope to have at least one of our two open fund manager positions filled sometime in June.

We are working on contingency plans for the short-term.

RESEARCH FUND MANAGER, FAMILY MEDICINE

Work Location
Los Angeles,CA

Duration
Indef

Job #14890

Salary Range
$64800-137600 Annually

Work Hours
Monday – Friday, 8:00am – 5:00pm

Posted Date
April 2, 2024

Employment Type
2 – Staff- Career

Bargaining Unit
99

Apply Now

Apply as Internal/Current Employee

Fund Manager Updates

If your fund manager is not Chris/Andrew: For now, not much will change since Lois was still in training anyway.

- You or your approver should continue to reach out to Laura and Valencia for procurement approvals (gift cards, purchase requests, travel reimbursements)

- Laura will help create financial reports for review

- Laura and Valencia will help set-up/manage subawards

- Laura will submit Close-Outs until another solution is found

Please take extra initiative to manage your own financial portfolio as best you can and schedule meetings with Laura if you need assistance

Plan Ahead

Laura was scheduled for a 2-week vacation **June 10-21**.

In light of recent events, she will instead be doing a reduced-work load during that period:

- If you are planning any **proposals** that are due during this period, or the end of June, please reach out to her and Chris NOW to get those proposals submitted prior.

- If you have any major **fund management needs** (e.g. subaward set-ups, fund closures, massive purchases), please reach out to her/Lois now to get them resolved or create a workplan.

Off-site Furniture, Computers, Equip, etc.

Supervisors: Please create inventory of any furniture (desks, chairs), computers/peripherals (laptops, keyboards, mice), cell phones/tablets, and any other equip/devices that your employees have at home/off-site.

Upon separation, it will be your responsibility to make sure the employee returns these items (along with ID badge, office keys, and building access card)

Updated F&A Rate Agreement – CBR Rates

An updated F&A Rate Agreement (dated April 22, 2024) reflecting recently approved FY24/25 Composite Benefit Rates (CBRs) has been posted to OCGA's website. Effective immediately these rates should be included in proposal budgets.

Group #	Employee Group	Approved FY23-24 CBR	Approved FY24-25 CBR
1	Faculty Summer	3.7%	3.8%
2	Non-HCOMP Faculty	31.6%	33.1%
3	HCOMP Faculty	32.9%	32.4%
4	Other Academics	44.1%	45.6%
5	Post Docs	18.4%	22.3%
6	Staff Exempt	44.1%	45.6%
7	Staff Non-Exempt + Food-Custodian-Grounds	49.1%	50.3%
8	Employees & Students with Limited Benefits	3.7%	3.8%

Managing Subawards – PI Responsibilities

Principal Investigators are required to review and approve invoices for their subawards/ subcontracts in BruinBuy *Plus*.

PIs SHOULD receive an email notification when a subaward/subcontract invoice requires their review and approval. (PI's can also log in directly to approve within the BruinBuy Plus application)

From: UCLA@sciquest.com <UCLA@sciquest.com>
Sent: Tuesday, March 5, 2024 3:40 PM
To: Bruin, Joe <JBruin@mednet.ucla.edu>
Subject: New Pending Approval for Invoice# I1234567

If PI doesn't receive the notification, the fund manager will obtain signature on the PDF form instead.

Review Invoice

Upon email receipt, review for accuracy and to ensure that the subsite is appropriately billing for work completed.

Select the Take Action hyperlink within the email, which will direct you to a new window of your web browser.

Approve or Reject Invoice

1. Within the new window, you may utilize the **Comments** section to add a note, which will display along with the action you wish to take on the request. Select your desired action from the options below to complete the request.

   a) **Approve**: Approves the invoice

   b) **Reject/Cancel**: Fully rejects an invoice and removes from workflow. The vendor will need to resubmit an updated invoice to initiate the payment process

   c) **Assign to Myself**: Places the invoice in your Assigned Approvals queue within BruinBuy *Plus* to review and approve later

2. BruinBuy *Plus* will automatically update with your decision once you have made your selection on the invoice.

Just-In-Time/Pre-Award Reviews

NIH Just-In-Time (JIT)

Official Just-in-Time requests that come directly from the NIH Grants Management Specialist will be acted upon accordingly. Neither the appearance of the JIT link in the Commons, nor an auto-generated JIT email request, constitutes a request by the grantor agency. These elements, that can be submitted Just-in-Time by the applicant when requested by NIH, may include:

- Other Support

- Verification of Institutional Review Board (IRB) Approval of the project's proposed use of human subjects (when applicable)

- Verification of Institutional Animal Care & Use Committee (IACUC) Approval of the project's proposed use of live vertebrate animals (when applicable)

- Evidence of compliance with the education in the protection of human subjects requirement and CITI training

Front Door for Research

https://it.uclahealth.org/resources/resources-for-researchers

Categories of Major Services Offered

Services to facilitate your research

Computation, Storage, Software

Services for High-Performance Computing (HPC), servers, cloud computing, data storage, and obtaining software.

Learn more

Data Access and Collection

A range of services related to gaining access to datasets, cohort discovery, capturing and exploring data.

Learn more

Study Activation and Development

Platforms and services involved in the process of activating and developing studies and clinical trials.

Learn more

Additional Resources on Overview Page

Resources

These include services such as core research facilities for data collection, audiovisual support, UCLA Library Resources, data management planning tools, animal resource management and more.

Account Transfer ⌄		Local Presentation Support ⌄	
Conference Room Booking ⌄		New IT Project Request Intake Form ⌄	
CTSI Researcher Resources ⌄		Onboarding Reminders ⌄	
Data Management Planning Tool ⌄		UCLA Biomedical Library Key Resources ⌄	

Resource Facilities

|	
Core Services	⌄
Division of Laboratory Animal Medicine (DLAM)	⌄

Training and Consultations

Training

A collection of UCLA data services providers that offer workshops, trainings, webinars or consultations that support research.

Bioinformatics Training ⌄		Research Workshops Portal ⌄	
Biostatistical Consults ⌄		Research Tech Talk Recordings ⌄	
Data Management Consultation ⌄		Statistics Webinar ⌄	
Citation Management ⌄		UCLA Health Data Day Recordings ⌄	
Environmental Health & Safety ⌄		ULEAD Training and Support ⌄	
NIH Data Management and Sharing Guidelines ⌄			

Technical / Progress Reports: Submit on time!
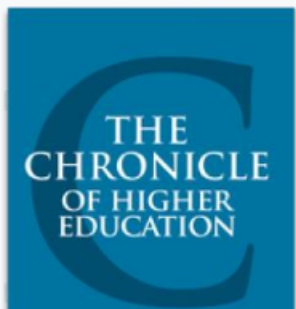
One Scientist Neglected His Grant Reports. Now U.S. Agencies Are Withholding Grants for an Entire University.

By Francie Diep APRIL 10, 2024

The National Institutes of Health, the Office of Naval Research, and the U.S. Army are withholding all of their grants from the University of California at San Diego because one scientist failed to turn in required final reports for two of his grants, according to a message sent to the campus community on Tuesday.

"This action is the result of one Principal Investigator's extended non-submission of final technical reports for two awards," Corinne Peek-Asa, vice chancellor for research and innovation, wrote in the message. "If you are a PI receiving a new or continuing award from one of these agencies, you will receive a notice that the award will be delayed."

General Procurement Guidance - New Vendors

We no longer have the ability to register anyone in PaymentWorks ahead of time.

Now we have to initiate a transaction first, and then if the vendor is not registered, the system will add a step to the processing timeline.

For example, if you are trying to pay a guest speaker, instead of getting routed for payment after we submit a Direct Pay request, the payment request is put on hold while the system sends PaymentWorks registration information to the vendor/recipient.

The vendor must complete their PaymentWorks profile/registration in order to get paid. Once they do, the payment process will resume and the payment should be processed.

General Procurement Guidance - New Vendors

What does that mean for you?

This means that you no longer need to obtain W9s or anything like that to attempt to register a vendor/recipient ahead of time.

Instead, you just want to make sure that you include the vendor's/recipient's correct email address when you submit your check request form (or Purchase Request Form).

You should also make sure the vendor/recipient understands that they will be getting an automated email with instructions on how to register with PaymentWorks and they MUST complete that process in order to be paid.

General Procurement Guidance – PO's

You should never purchase an item or have a service rendered until there is an active Purchase Order in place. There are some exceptions that can be paid using the "direct pay" feature or Pcard, and we've covered those in previous research meetings (e.g. utility invoices, guest speaker fees, memberships, etc.)

We no longer have the ability to create PO's automatically at the department level. All PO's that we "create" actually have to be submitted as requisitions first, and then after review by Purchasing, a PO will be created centrally.

Submitting a Purchase Request Form or having that form "approved" is not the same thing as having an active PO. PO numbers (almost) always start with 1550.

Vendor Invoices

Once a PO has been created, the vendor will automatically receive a copy of it. They can then provide the item/service and then submit their invoice.

They can do that in one of two ways:

1. Submit their invoice directly to noreply@invoices.ucla.edu
2. Submit the invoice to you, and you (or Valencia, if you prefer) submit it to noreply@invoices.ucla.edu

Vendor Submitted Invoices – Pros and Cons

PROS	CONS
• Recommended by BB+ • Easy for vendors to remember (same inbox for entire University) • Fastest (in theory)	• Invoices are auto-scanned, so errors will prevent proper processing. We have no way to track them if they don't match in the system. • Harder to keep track of remaining funds (for Declining Balance POs) • Vendor will be paid whether or not item was delivered/service was rendered, unless PO was set up to mandate Receiving

Vendor Invoices – Helpful Tips

- Invoices should be PDFs and must be standard 8.5 x 11 in size.

- Only one invoice per PDF. The invoice can be more than 1 page, but you can't have more than 1 invoice in the same attachment.

- The PO # must be clearly typed on the invoice. It cannot be handwritten. If it is fuzzy, or has weird spacing or parenthesis, or anything else that may confuse an automated scan, re-type the PO # in big, clear font.

- Having the PO # in the filename doesn't matter. The PO # must be typed on the invoice itself.

- It can take up to 5 business days to "match" in the system, but I've seen it happen in minutes as well.

Guest Speakers

- Complete and submit a [Check Request Form](#)

- Be sure to include the email address of the speaker and the location of service

Check Request Form

UCLA

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

AGREEMENT NUMBER

NAME OF PERSON TO CONTACT	DEPT. NAME	TELEPHONE	DATE
Josephine Bruin	Family Medicine	310-794-5555	5/2/2024

LOC	ACCOUNT	CC	FUND	PROJECT	SUB	OBJECT CODE	SOURCE	AMOUNT
4	441435	XX	123456		03	3345		250

VENDOR OR PAYEE
Name: Harry Potter
Address: Cupboard under the stairs, Privet Dr., England 12345
Email: Seeker1@hogwarts.edu
Location where service was provided: London, England

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
1	each	Panelist speaker fee	250.00	250.00
				0.00
			ESTIMATED FREIGHT	
			TOTAL	250.00

Section 2: Justification/Pre-Payment (Not to be used in lieu of a vendor invoice):

This request is to pay the speaker fee for Harry Potter for participating as a panelist at our Quidditch Panel Conference on 5/2/24, held via zoom. This is funded by the Quidditch R01 project, which has a specifc budget line item for panelist speaker fees.

Catering/Conferences/Events – Reserving a Room

1. Obtain permission from your PI/approver to conduct the event and determine the correct funding source.
2. Work directly with event location vendor (e.g. The California Endowment) to find an available date for your event. Typically they will then send you a contract with Terms & Conditions (T&C) for signature. Event location vendors also may require a room reservation deposit. **DO NOT SIGN ANYTHING YOURSELF.**
3. Send the following to your fund manager and Valencia:
   a. The T&C/contract document requiring signature
   b. FAU to charge
   c. Business Justification
   d. Event Details. Must include:
      i. Event name
      ii. Event date/time
      iii. Event purpose
      iv. The number and type of expected attendees (attach invite list if you have it)
      v. Agenda/flyer if you have it
4. The fund manager will review/approve. Valencia will then submit a via BruinBuy Plus (BB+).
5. Travel Accounting will review/approve in BB+ and will issue a signed contract/T&C to the vendor and your reservation should now be complete.

Catering/Conferences/Events – Reserving a Room

1. Obtain permission from your PI/approver to conduct the event and determine the correct funding source.
2. Work directly with event location vendor (e.g. The California Endowment) to find an available date for your event. Typically they will then send you a contract with Terms & Conditions (T&C) for signature. Event location vendors also may require a room reservation deposit. **DO NOT SIGN ANYTHING YOURSELF.**
3. Send the following to your fund manager and Valencia:
   a. The T&C/contract document requiring signature
   b. FAU to charge
   c. Business Justification
   d. Event Details. Must include:
      i. Event name
      ii. Event date/time
      iii. Event purpose
      iv. The number and type of expected attendees (attach invite list if you have it)
      v. Agenda/flyer if you have it
4. The fund manager will review/approve. Valencia will then submit a via BruinBuy Plus (BB+).
5. Travel Accounting will review/approve in BB+ and will issue a signed contract/T&C to the vendor and your reservation should now be complete.

Catering/Conferences/Events – Food

- If you will be using a separate vendor for food, Valencia must submit a separate request via BB+.

- Detailed guidance is forthcoming.

- Please note that we will need at least the following:
  - Catering Invoice
  - Guest list with names and affiliations
  - Entertainment Worksheet. Note: must have separate worksheet for each type of meal (e.g. breakfast, lunch).
  - Event Details. Must include:
    - Event name
    - Event date/time
    - Event purpose
    - The number and type of expected attendees (attach invite list if you have it)
    - Agenda/flyer if you have it

Gift Cards

Ordering Gift Cards was covered during the December Research Unit Meeting, however there is updated guidance.

~~4~~ 3 Types of Allowable Gift Card Purchases:

- IRB Approved Research Payment Request
- ~~Non-IRB Research Payment Request~~
- Employee Recognition Request
- Non-Employee Disbursement Request

They are no longer accepting "Non-IRB Research Payment Requests."

Instead, we are instructed to use "Non-Employee Disbursement Request" and to attach the IRB Exemption.

UCLA

	Research Payment Request (IRB Approved)	Employee Recognition Request (ERRP)	Non-Employee Disbursement Request (G42)
Description	Disbursement requests for research payments that are approved by the Institutional Review Board (IRB). Must provide current IRB approval number.	Disbursement requests for the Employee Recognition and Reward Program (ERRP) in which non-cash awards are distributed for the purchase of goods (not services).	Disbursement requests for non-cash awards presented to non-employees (see UC Policy G-42) Will need to provide OHRPP exemption notice, if provided/applicable.
Forms of Payment	Gift cards/e-codes Bruincard deposits Cash Max amount: $5,000	Gift cards/e-codes Bruincard deposits Max amount: $75 per award/employee	Gift cards/e-codes Bruincard deposits Max amount: $600 per individual
Instructions	IRB Approved Research Payment Request	How to Submit an Employee Recognition Request	How to Submit a Non-Employee Disbursement Request

Physical Security of Cash and Cash Equivalents

Policy IX. 5: Each Campus shall use lockable receptacles or burglarproof/fire resistant safes to store cash based on the following cash limits:

1. Up to $1,000 in a lockable receptacle

2. From $1,001 to $2,500 in a safe

3. From $2,501 to $25,000 in a steel-door safe, with a door thickness of not less than 1 inch and wall thickness of not less than ½ inch.

4. From $25,001 to $250,000 in a class TL-15 composite safe or better.

5. Over $250,000 in a class TL-30 steel or better safe.

Deviation from these procedures may jeopardize the University's liability coverage.

Learn more about UCLA's guidelines for physical security of cash and requirements for cash handling and storage here. If you have questions, please visit the PSC website for answers or reach out to them on the MyUCLA Message Center to ask a question.

Upcoming Meetings/Events

- Next Research Unit Meeting: June 6

- Next Grand Rounds: May 24

- Research Faculty Meet the Residents: July 17

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

Thank You