Family Medicine Research Unit Monthly Meeting

June 2025

Recently Submitted Proposals (since last meeting)

PI	Title	Sponsor	Prime Sponsor	Program Type	Overall Proposal Type	Project Begin Date	Project End Date
Moreno, Gerardo	Training UCLA PRIME future physicians serving the Centinela Valley	CALIFORNIA COMMUNITY FOUNDATION		Training	New	4/30/2025	4/30/2027
Tarn, Mimi	Addressing a key barrier to clinical trial enrollment: lack of knowledge about clinical trials	UCSF	NIH	Other Org Research	New	5/1/2026	4/30/2029
Li, Michael	A mixed methods assessment of preferences, barriers, and facilitators of pre- and post-exposure prophylaxis for HIV prevention in sexual minority men and transgender women in Los Angeles, California	Merck & Co, Inc	-	Clinical Research	New	9/1/2025	8/30/2027
Li, Michael	AI-enhanced contingency management: A personalized and responsive mobile application to treat methamphetamine use disorder	NIH-NIDA	-	Clinical Research	New	12/1/2025	11/30/2030
Moreno, Gerardo	UCLA Street Medicine Primary Care Program	DHHS-HRSA	-	Training	New	7/1/2025	6/30/2030
Shoptaw, Steven	Methamphetamine Assessment and Referral to Care in HIV Primary Care: The MARCH Study	UCSD	NIH	Clinical Research	New	12/1/2025	11/30/2030
Shoptaw, Steven	Methadone Maintenance Treatment Providers to Promote PrEP Uptake among People Who Use Drugs in Treatment in Vietnam	Hanoi Medical University (Vietnam)	NIH	Clinical Research	New	12/1/2025	11/30/2028

Recently Processed Awards (since last meeting)

PI	Award Title	Sponsor	Prime Sponsor	Action Type	Project Period Begin Date	Project Period End Date
Li, Michael Jonathan	Trajectories of Socially Regulated Gene Expression, Methamphetamine Use, and Viral Load Among HIV-positive Men Who Have Sex with Men (MSM) Receiving Contingency Management	NIH-NIDA National Institute on Drug Abuse	-	Continuation	04/01/2021	03/31/2026
Shoptaw, Steven J	Center for HIV Identification, Prevention and Treatment Services	NIH-NIMH National Institute of Mental Health	-	Continuation	03/01/2022	12/31/2026
Tarn, Derjung Mimi	Increasing the Feasibility, Impact, and Equity of the Medicare Annual Wellness Visit	NIH-NIA National Institute on Aging	-	Continuation	08/01/2023	04/30/2028
Shoptaw, Steven J	Contingency Management Pilot Program	Shine BC-LA	CONRAD HILTON FOUNDATION	Continuation	03/23/2023	12/31/2025
Shoptaw, Steven J	NIDA Clinical Trials Network: Big South/West Node	University of Texas-Southwestern Medical Center at Dallas	NIH-NIDA	New	03/01/2025	02/29/2032

Research Unit Administrative Team
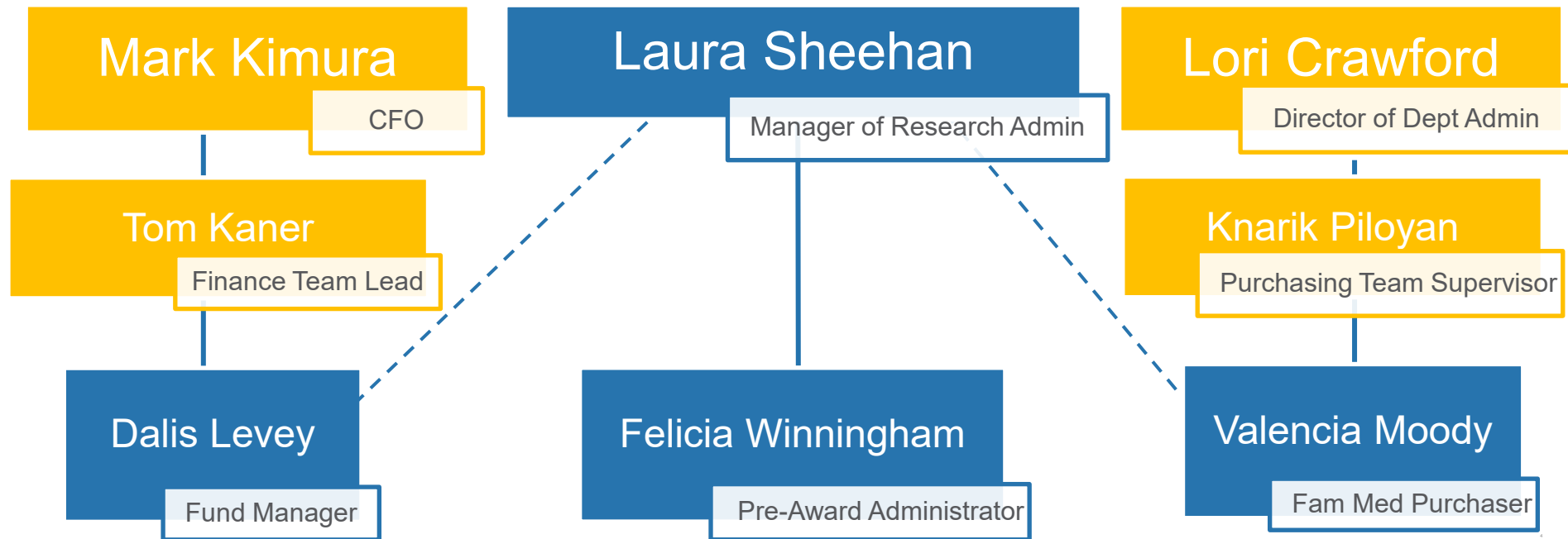
Pediatrics & Family Medicine Purchasing Team

Team Supervisor

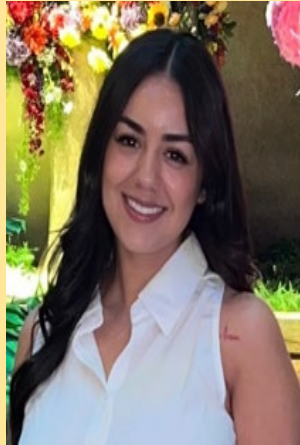

Knarik Piloyan

Purchasers

Veronica Garcia Hernandez
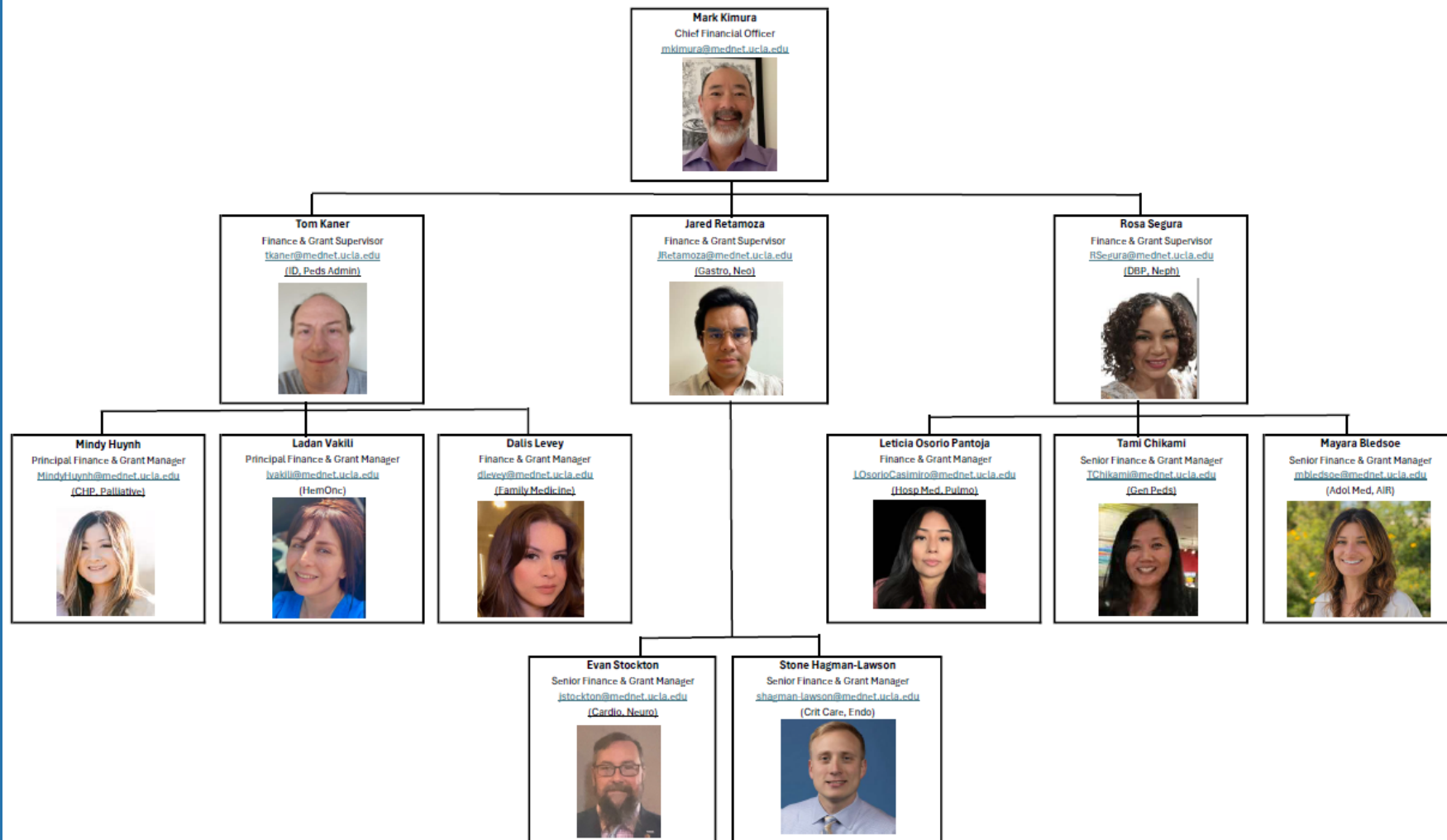
Alex Keveney

Candice Lopez

Valencia Moody Burns

Gahliema Martin

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# Department of Pediatrics & Family Medicine Fund Management Team

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Monthly Meetings with Fund Manager

All PI's should have a standing, monthly meeting scheduled with their fund manager to review their financial reports:
- o Initiate transfers, payroll distribution corrections, subaward set-ups, etc.
  - o Ensure that all recorded expenses are allowable, applicable, complete
  - o Determine if adjustments need to be made
- o Review encumbered items
- o Review projected balances and monitor spending rate
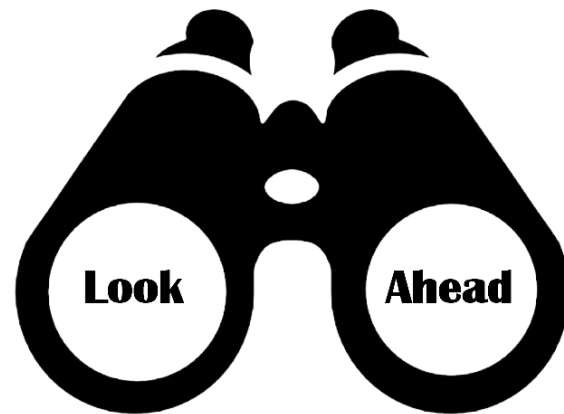
Laura's Upcoming Vacation

Laura will be out of the office **June 10-20**.

- Essential **Procurement/Purchasing** requests should be submitted directly to FamMedPurchasing@mednet.ucla.edu (PI/authorizer approval still required; but we can temporarily skip fund manager pre-approval during my vacation)

- **Fund Management/Post-Award** issues should go directly to Dalis Levey (or Tom Kaner)

- **Proposal/Pre-Award** requests/concerns should be directed to Felicia Winningham

- **Oppenheimer Suite** concerns should be directed to Valencia Moody.

- Will check email periodically; please text if urgent. May be a day or two delay if poor cell reception in a particular area.

Performance Evaluations

- For UCLA Health career staff in non-academic positions across the health system and the David Geffen School of Medicine hired on or before January 4, 2025:

- Managers should **meet with employees to review their evals by June 8**.

Mar 3 – 16	Mar 17 – Apr 13	Apr 14 – Apr 27	Apr 28 – May 11	May 12 – Jun 8	Jun 9 – Jun 15
Employees complete Self-Evaluation	Managers complete Manager Evaluation	Department Senior Leadership Review / Calibration	Senior Executive Review and Approval	Managers meet with employees and sign off	Employees sign off

Performance Evaluations

- Five-point rating system

1 Unsatisfactory
2 Needs Development
3 Effective
4 Exceeds
5 Role Model

Performance consistently exceeds objectives and expectations. Recognized by others for their notable and valued contributions. Produces high impact results and demonstrates behaviors and an attitude that serves as an example to others.

Mandatory Training
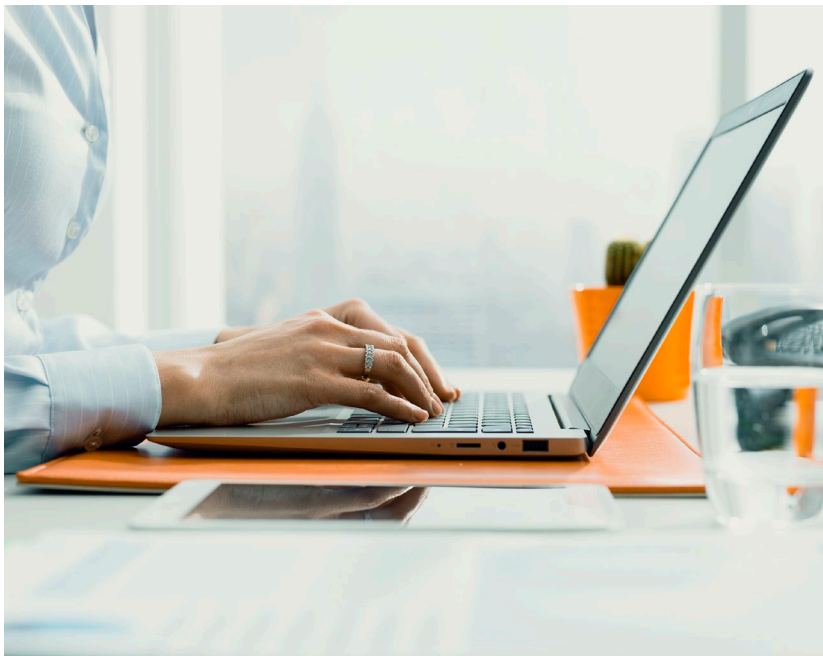
Please ensure you and your staff are up-to-date on all **required trainings** in Cornerstone, UC Learning Center, and building safety.

Upcoming Holidays

Juneteenth
Thursday, June 19th

Independence Day
Friday, July 4th

Research Day 2025
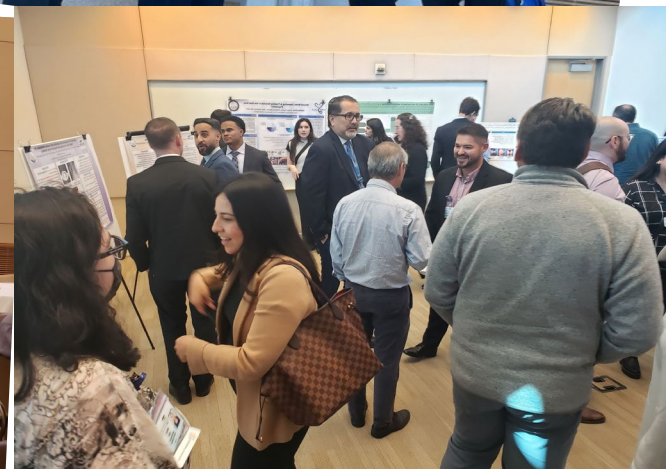
Research Day 2026

WEDNESDAY, MAY 27, 2026

Details will be announced closer to the event date

Please visit the Research Day Website

https://www.uclahealth.org/departments/familymedicine/research/research-day

There will be no
June 2025
Grand Rounds

Please join us in July for our next
Ground Rounds meeting

Sorry EVENT
CANCELLED

Research Faculty Meet the Residents

Wednesday, June 25, from 8-11am

- o Current research 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 **Faculty must <u>sign-up</u> for a time slot by tomorrow**

- o Will be conducted via Zoom

Updates for Newsletter

Please send any updates for the department newsletter to Tiffany De La Cruz and Denise Acelar. This includes:

- Recent publications

- Newly funded research projects

- Academic or research achievements/announcements

- Other news you would like to share with the department

Photos are welcome!

Outgoing Proposals

- Felicia Winningham is your point of contact for all proposals

- You must provide us with a [Proposal Intake Form]

- We need to submit to OCGA by COB on the **6th business day** prior to deadline

- If you are the lead investigator, proposal must be submitted through Fam Med

SIX is the

new **FIVE**

(business days)

Current and Pending Support (Other Support)

PI's are responsible for keeping their own OS/Current & Pending Support pages up to date.

The PI Portal includes a pre-populated NIH Other Support form with information from the Office of Research Administration's (ORAs) Proposal and Award Tracking System (PATS).

OCGA will compare your OS/Current & Pending Support with the one generated by the PI Portal, so you should compare prior to submission. Anything missing will result in OCGA not accepting your OS page.

Must be certified via Docusign (no other type of signature will be accepted)

More Information: https://ocga.research.ucla.edu/other-support/

What to include:
- Active Awards and Pending Proposals
- Active and Pending In-Kind Contributions
- Gifts
- Overlap Statement

New Terms for all NIH Grants

Notice of Civil Rights Term and Condition of Award

Notice Number:

NOT-OD-25-090

Key Dates

Release Date: April 21, 2025

Purpose

This Notice alerts the extramural research community of a new Civil Rights term and condition that modifies the current terms and conditions for all NIH grants, cooperative agreements, and other transaction (OT) awards. This term applies prospectively to new, renewal, supplement, or continuation awards issued on or after the date of this Notice. This new requirement supersedes Section 4.1.2 "Civil Rights Protections" of the NIH Grants Policy Statement (GPS) as well as the negotiated terms of OT awards.

(a) By accepting the grant award, recipients are certifying that:

(i) They do not, and will not during the term of this financial assistance award, operate any programs that advance or promote DEI, DEIA, or discriminatory equity ideology in violation of Federal anti-discrimination laws; and

(ii) They do not engage in and will not during the term of this award engage in, a discriminatory prohibited boycott.
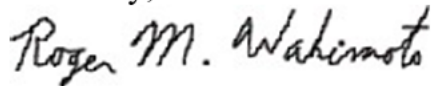
(3) NIH reserves the right to terminate financial assistance awards and recover all funds if recipients, during the term of this award, operate any program in violation of Federal anti-discriminatory laws or engage in a prohibited boycott.

New NIH Terms – Still Under Review at UCLA

Research Colleagues,

We have received many questions about the new HHS and NIH policy requirements issued by HHS (see page 18) and NIH. These terms have been or will be incorporated in the Civil Rights Protections sections of the HHS and NIH Grants Policy Statements. We are studying the implications of these new terms in partnership with the UC Office of the President and UC Office of General Counsel. For the immediate term, all newly issued NIH and HHS award notices and award modifications received by UCLA are being held temporarily while we work to analyze and understand the new requirements. We will contact you as soon as we have more information.

Sincerely,

Roger M. Wakimoto
Vice Chancellor for Research and Creative Activities

NIH Salary Cap (released 4/3/26)

- **NIH Salary Cap as of Jan 1, 2025: $225,700**

- For active awards, including awards that have been issued in FY 2025 (continuation and new) that were restricted to Executive Level II, if adequate funds are available, and if the salary cap increase is consistent with the institutional base salary, recipients may rebudget funds to accommodate the current Executive Level II salary level.

- The salary limitation also applies to all subawards and subcontracts.

Fiscal Close Reminders

- **No New Purchase Orders in June**: No new purchase orders will be generated during June, except for catalog orders. Requests will sit until July.

- **No Change Requests in June**: Change requests to existing POs that were submitted after May 30 will also sit until after July 1st.

- **Invoices**: Invoices submitted after May 30 will be processed and paid in FY 2025-2026 (excludes select catalog vendors and invoices with a due date or discount date of June 30, 2025, or earlier)

Catalog Orders

Current Landscape

Like many other higher education institutions, UC and UCLA are facing significant financial challenges due in part to federal and state funding reductions.

In response to UC President Drake's directive regarding the implementation of cost-saving measures and in anticipation of additional government funding reductions, UCLA is actively working to **reduce discretionary spending** while still supporting the University's academic mission.

As announced earlier today, **we are asking that you review all non-essential travel and entertainment activities to determine whether they can be canceled or postponed indefinitely.**

Reducing Non-Essential Travel

Non-essential travel includes but is not limited to:

Conferences

Retreats and **team-building trips**

Other travel that can be postponed or for which results can be **achieved virtually**

⚠ If non-essential travel has already been booked, **please consider canceling the trip** – travelers will be reimbursed for nonrefundable costs.

Reducing Entertainment Expenditures

Broadly speaking, departments should reduce entertainment expenditures wherever possible.

Sponsorships

Units should **cease providing sponsorship** for events hosted by other organizations.

Employee Meals

In accordance with BUS-79, the University will not pay for or reimburse costs for meals involving only UCLA employees **unless the business purpose cannot be accomplished during working hours**.

Departmental Meals

Departmental meals or other expenditures may be allowable but are limited to **once per quarter.**

Activities Not Subject to These Prohibitions

- ✓ **Study abroad** programs
- ✓ **Fundraising** trips and activities
- ✓ **Sponsored research** travel
- ✓ Activities related to **Athletics**
- ✓ **Recruiting** meals or trips
- ✓ Activities required under a **collective bargaining agreement**
- ✓ **Local conferences** that do not require lodging or daily meals and incidentals
- ✓ Faculty or researcher travel to conduct **necessary research**
- ✓ Faculty or researcher travel to attend a conference for **necessary training**
- ✓ Meeting or training participation **required by a grant** or required to **maintain grant funding**
- ✓ Department meals or other activities, including employee morale events (limited to once per quarter). **Retreats or team-building trips are not allowed***

*Morale events are local activities while trips require hotel and/or airfare.

Pre-Approval Requirements

To ensure thoughtful spending, the following expenses will now require **pre-approval from a department's CAO**.

All **employee entertainment** activities

Essential travel not included in exclusion slide

UCLA

All **employe moral** activities

Travel Accounting pre-approval also required

Travel Reminders

Travel Bookings

All allowable travel should be booked by contacting the UC Travel Center at (310) 206-2639 (option 2), emailing travel@finance.ucla.edu, or using the UCLA Concur Online Booking Tool.

Transportation Mode

UC's Travel Policy requires using the most economical mode of transportation. If air travel is essential, **employees generally must fly regular economy.**

Events Requiring EOL Registration

UCLA Policy 860: Organized Events requires all organized events happening on UCLA property, including extracurricular or non-academic activities (i.e., those outside the academic curriculum), must be registered through our Events Online (EOL) portal if **any** of the following criteria apply:

- Individuals who are non-affiliates will be in attendance
- The event expects more than 50 attendees and features a non-affiliate guest speaker
- Alcohol will be served
- Tents or other temporary structures will be placed or raised
- There will be a media presence, and/or commercial filming will take place
- Food or merchandise will be served or sold to the public

No services should be rendered and no products should be ordered until the vendor has received a PO #.

Yes, what about travel, though?

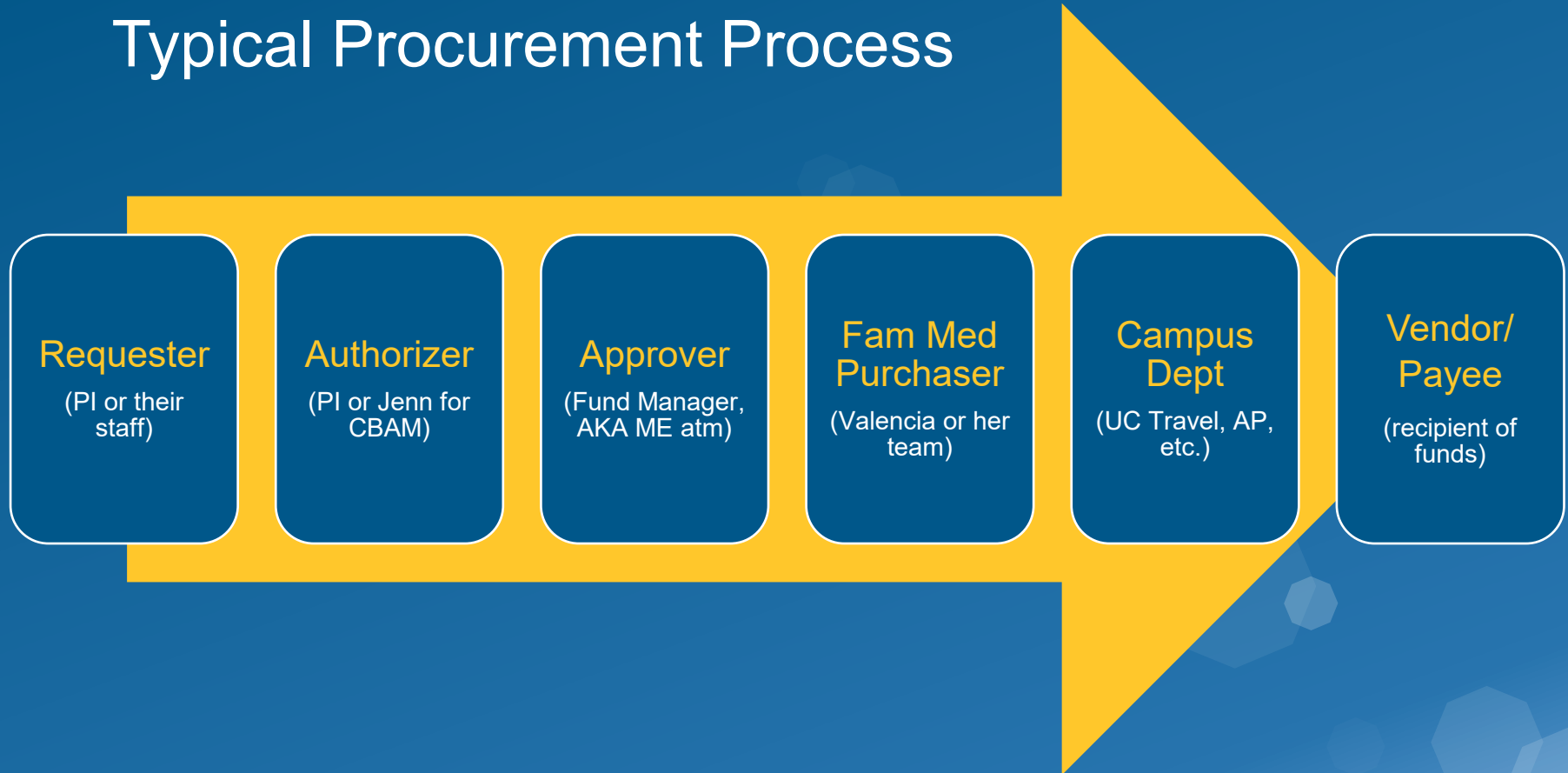*OK, smarty-pants, that's the one exception. Put a pin in that, we'll get to Travel in a few slides.*

- If a vendor generates an invoice and you don't have a PO # yet, or

- If you are buying something with your own cash or credit card (and it isn't a travel expense), or

- If you are signing Terms & Conditions to reserve an event space, or

- If you worked with a vendor to provide a service and they are now asking to be paid for that service and you just now realized that you haven't submitted any paperwork to your fund manager…

YOU'RE DOING IT WRONG
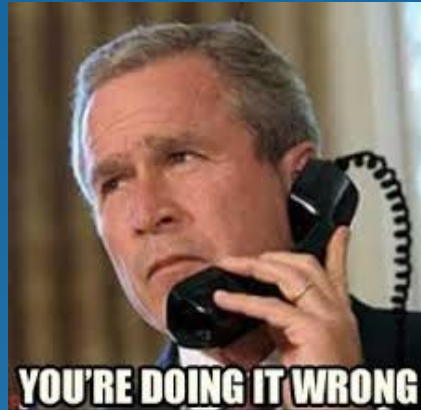
Every transaction that requires payment, must be pre-approved and signed off by someone with authorization to spend. That applies to ordering supplies, hiring a consultant, purchasing flights, utilizing parking services on campus, securing a venue for an event, paying a guest lecturer, utilizing a campus lab, etc.

Typical Procurement Process

Requester
(PI or their staff)

Authorizer
(PI or Jenn for CBAM)

Approver
(Fund Manager, AKA ME atm)

Fam Med Purchaser
(Valencia or her team)

Campus Dept
(UC Travel, AP, etc.)

Vendor/ Payee
(recipient of funds)

Checks and Balances

Good accounting practices incorporate a system of checks and balances to ensure that no one person has control over all parts of a financial transaction.

This means the person requesting the financial transaction must be different from the person who approves it and that person is different from the one who processes it.

Why is this important?

UCLA is a state agency, funded in large part by tax dollars. In addition, many of our research projects are federally funded. These factors mean there is an extra layer of scrutiny over how we spend money and it's important that we have systems in place to prevent fraud and abuse.

What happens if I buy something without going through the appropriate process?

If services are rendered or products are ordered without a PO # already in place, we will be forced to submit an **After the Fact request, which MAY NOT BE APPROVED.**

These forms require several layers of approval: the Department CAO, the DGSOM Controller, the DGSOM Sr. Associate Dean, and UCLA's Chief Procurement Officer.

This can take upwards of a month.

The PO will not be created while we wait for these approvals. Only if all aforementioned parties approve it, will the PO then be created, at which point the vendor can be paid.

Understood. So what form do I need to submit to make sure I buy things in the correct way?

PURCHASING/FINANCIAL FORMS AND INSTRUCTIONS:

At Your Service Catering 📄

Check Request Form 🗔

Debarment and Anti Lobby Certificate 📄

Foreign Wire Transfer Requests 📄

Gift Cards for IRB-Approved Research Participant Payments ⬀ (Review guidelines and complete the entire ordering process. The system will send the request to the PI and Fund Manager for review/approval before processing)

Gift Cards for Non-Employees and Non-Research Subjects ⬀ (Review guidelines and then download/complete the SFS Non-Employee Disbursement Form ⬀ on Step 2. Then STOP and submit the form to your Fund Manager. They must sign off before you can proceed.)

Guest Traveler - Airfare/Hotel Request Form 📄

Independent Contractor/Consultant Checklist 📄

Mileage and Parking Reimbursement Form 🗔

Procurement Forms Guide 🗔 (not sure what form to use? Check out this guide, which is a work-in-progress, to see which forms you should submit to your approver/fund manager to get what you need)

Purchase Request Form 🗔

Source Selection & Price Reasonableness (SSPR) Form 📄

Travel

- It is preferable for us to pay for flight and registration directly from grant/funding sources, rather than travelers purchase out of pocket and seek reimbursement

- The only expenses the traveler should incur directly are the following: hotel, ground transportation (taxi/Lyft/Uber), and food

Airfare

1. **Create a draft itinerary** by either going to the SAP Concur website or by calling UC Travel at 310-206-2639 and having a Travel Agent create the itinerary for you (the latter is what I prefer). If you are working with a Travel Agent, let them know you will be paying via Concur Request ID (AKA Direct Pay or PTA). Tell them if it will be paid from a FEDERAL FUNDING SOURCE.

2. Once you have spoken with a Travel Agent, a draft itinerary will be emailed to you. If you are booking using the self-service SAP Concur website, you will create the itinerary yourself. **You will need your itinerary for the next step.**

3. To **request a Concur Request ID/PTA**, you will need to email the following information to Laura Sheehan:

   - **FAU**

   - **Business Justification** for the travel (please avoid jargon and use language that can be copied and pasted directly into the system. E.g. don't say "I wanna pay for my trip to SD conference next month," but rather: "Roundtrip airfare for Dr. Josephine Bruin to Washington DC to attend the Scientific Development conference October 2-5, 2025.")
   - Attach the **Travel Itinerary** you received from UC Travel Agent or the Concur Website

4. Laura will approve and forward to our Fam Med Purchasing Team, who will create the Concur Request ID. If you used a Travel Agent, we can submit the Concur Request ID directly to the travel system for processing. If you did it yourself on the Concur website, you need to log back in and enter it there.

5. The traveler will then receive confirmation of the finalized itinerary via email.

Save the itinerary and Concur Request ID for later, as you will need it when you submit your reimbursement request. Even though you aren't paying out of pocket, we need to provide proof that it was paid and what method was used.

Hotel

Work directly with the hotel to book your room (don't use package deals like Travelocity, etc. as you will be required to provide an itemized receipt, which sometimes those agencies cannot provide).

Exceptions for hotel maximum may be allowed IF RECEIVED IN ADVANCE.

University of California – Policy G-28
Travel Regulations

incurred are reimbursable. Travelers should be required to submit meal receipts if it appears that they are treating the cap as a per diem by routinely claiming the full M&IE amount. Lodging expense reimbursements are actual up to $333 per night before taxes and mandatory hotel fees and must be supported by original itemized receipts, regardless of the amounts incurred, and must be reasonable for the locality of travel. When the traveler is unable to secure lodging at $333 per night or less, the traveler must submit additional documentation such as price comparisons within the proximity of the meeting location that supports the higher lodging rate incurred. The price comparisons should be performed at the time of booking.

A traveler who is required to attend a conference where the prearranged conference lodging rate exceeds the $333 per night cap may stay at the conference hotel without exceptional approval.

Do not pay for other people's travel.

We have the ability to pay for guest airfare (and sometimes hotel/lodging) in advance directly. Ground transportation and food should be paid for by the traveler and then reimbursed.

If you need an exception to this policy, you must obtain approval in advance.

Guest Travel

There is a Guest Traveler Airfare/Hotel Request Form available on our website.

We encourage you to utilize it if your funds will cover a guest's travel expenses, as it provides detailed guidance on our policies and gathers required information.

Guest Traveler: Airfare/Hotel Request Form

Instructions: A UCLA Family Medicine employee should complete the blue sections of this form and then submit to the guest traveler for completion of the remaining sections. After returning the form to the employee, guests will then receive an itinerary for verification. Once the itinerary is confirmed, the employee should submit this form, the itinerary, and FAU to the Fund Manager and Purchaser to create the PTA. At that point, the final boarding pass/e-ticket will be sent to the guest traveler. If the guest needs to cancel for any reason, they should contact the employee immediately.

1. **Name of Event**	
2. **Detailed Business Justification**	
3. **Type of Ticket**	

Guests should complete the following:

4. **Name as it appears on Driver's License/ID**	
5. **Date of Birth (MM/DD/YY)**	
6. **Gender as it appears on Driver's License/ID**	
7. **Contact number (mobile)**	
8. **Email (to send final e-ticket)**	
9. **Frequent Flyer number, if applicable**	
10. **Preferred airline** *(not guaranteed)*	
11. **Departure city/airport**	

Location of Services

For Vendors/Payees who are being paid for services: **You MUST include the location where services were provided**, even if the services were virtual (e.g. guest speaking via Zoom)

Address Mismatches

The pay-to address for vendors/payees must match the address registered with PaymentWorks.

Invoices/check requests WILL BE REJECTED if there is an address mismatch.

Upcoming Meetings/Events

- No July Research Unit Meeting

- Next Research Unit Meeting: Aug 7

- Meet-and-Greet with the Residents: Jun 25

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

Thank You