



Family Medicine Research Unit Monthly Meeting

March 2024

Recently Submitted Proposals (since February)

PI	Title	Sponsor	Prime Sponsor	Type
Tarn, Derjung	Unlocking Insights: Understanding Motivators and Barriers to Clinical Trial Participation among Asian Adults	UNIVERSITY OF CALIFORNIA, SAN FRANCISCO	NIH-NIA	New
Gelberg, Lillian	Effectiveness of the Diabetes Homeless Medication Support (D-HOMES) program on diabetes management	Hennepin Healthcare Research Institute	NIH	Resubmission - New
Rosen, Allison Diane	Development of Ketamine to Increase Buprenorphine Induction and Adherence by Attenuating Precipitated Opioid Withdrawal Symptoms in Fentanyl Users	UNIVERSITY OF HOUSTON	NIH	New

Recently Processed Awards (since February)

PI	Award Title	Sponsor	Prime Sponsor	Action Type	Project Period Begin Date	Project Period End Date
Clark, Jesse Lawton	Mirtazapine for Methamphetamine Use Disorder: Drug-Drug Interaction Study	HELUNA HEALTH	NIH-NIDA	06/01/2021	05/31/2024	Modification/ Amendment
Donohoe, Thomas J	Ending the HIV Epidemic: A Plan for America – Technical Assistance Provider	Cicatelli Associates	DHHS-HRSA	03/01/2024	02/28/2025	Continuation
Shoptaw, Steven J	Contingency Management Pilot Program	Shine BC-LA	CONRAD HILTON FOUNDATION	03/23/2023	12/31/2023	New
Shoptaw, Steven J	Racial Equity in Systems to Treat Opioid Use Disorder for Everyone (RESTORE)	SAN DIEGO STATE UNIVERSITY RESEARCH FOUNDATION	NIH-NIDA	09/01/2023	07/31/2024	New

W2's

- If you signed up to receive your W2 electronically, you should have received an email letting you know it is available for download in UCPATH.
- UCLA will never email or text you your W2.
- If you did not sign up to receive it electronically, it will be mailed.

15 State Employer's state ID number 16 State wages, tips

Form **W-2** Wage and Tax Statement

Copy 2—To Be Filed With Employee's State, City, or Local Income Tax Return.

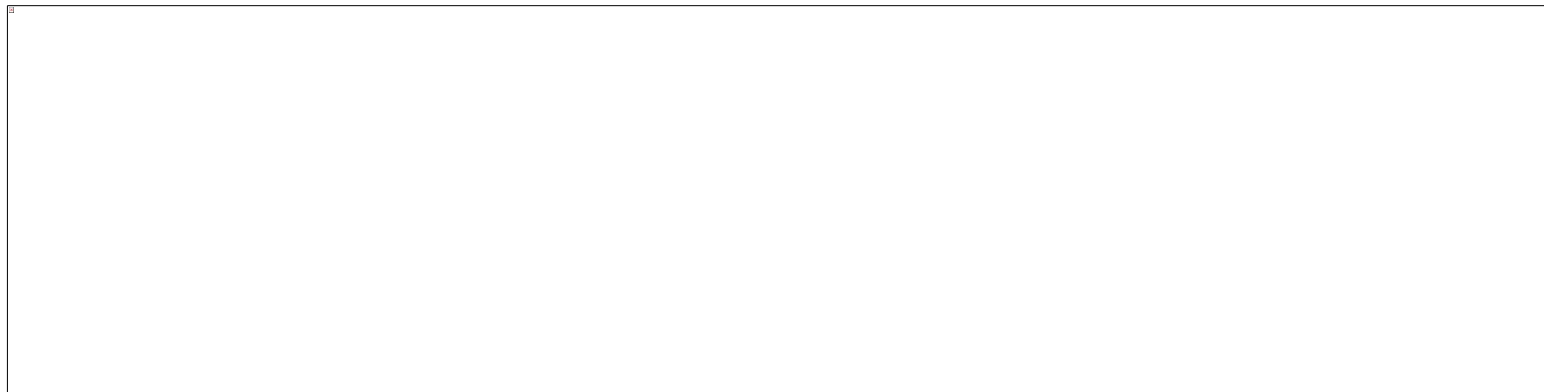
Upcoming Holidays



March 29, 2024
Cesar Chavez Day

Performance Evaluations

- For **UCLA Health career staff in non-represented, non-academic** positions across the health system and the David Geffen School of Medicine hired on or before **December 31, 2023**
- The self-evaluation period runs from March 4 -17. Employees have been notified via [Cornerstone](#) to initiate self-evaluations.



Performance Evaluations

- For **Union-represented, non-academic** positions across the health system and the David Geffen School of Medicine hired on or before **December 31, 2023**
- The self-evaluation period runs from March 9 -19. Employees will receive an email with a PDF of the evaluation form to initiate self-evaluations.

TIMELINE FOR UNION-REPRESENTED EMPLOYEES:

- **March 9, 2024 – March 19, 2024:** Employee completes self-evaluation.
- **March 20, 2024 – April 11, 2024:** Supervisor/Manager completes evaluation.
- **April 12, 2024 – May 3, 2024:** Supervisor/Manager meets with employee for official evaluation.

Performance Evaluations

- Five-point rating system



Any “1” or “5” rating must be accompanied with comments. “5” or “**Role Model**” rating should only be used after the employee has consistently exceeded expectations in previous reviews.

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.

Research Day

2024 Meeting Information

- In-person at the California Endowment downtown
- Wednesday, May 22, 2024
- Keynote Speaker: Dr. Tony Kuo

Abstract Submissions

- [Submission Guidelines](#) and other info can be found on our [website](#)
- Abstracts must be submitted via the [Submission Portal](#) by April 15, 2024



March Grand Rounds

Friday, March 22, 2024

12:00pm-1:00pm

Dr. Ruchi Fitzgerald

**The Project LIFE Program: Long Acting Injectable
Buprenorphine to End Overdose**
Opportunities for Addressing Equity in Substance Use
Disorder Treatment in Overlooked Populations



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)

OCGA Closure – March 19



March 6, 2024

Dear Colleagues,

The Office of Contract and Grant Administration (OCGA) will have an internal OCGA mandatory all-day training session on Tuesday, March 19, 2024. We kindly request that **proposals with sponsor due dates on March 19th be submitted to OCGA no later than 8:00 AM on Friday, March 15, 2024.**

If you have an unforeseen URGENT MATTER that must be addressed on March 19th, please email Proposals@research.ucla.edu. This email address will be checked periodically during the day and requests received will be assessed for urgency.

Outgoing Proposals

- Chris Ashikyan is your point of contact for all outgoing proposals
- You must include a [Proposal Intake Form](#) when you contact Chris
- Plan to submit to OCGA by COB on the **6th business day** prior to deadline
- Aim to submit a complete proposal, not just minimum documents required
- If you are the lead investigator, proposal must be submitted through Fam Med



SIX is the
new **FIVE**
(business days)



- Minimum documents **allow OCGA to conduct meaningful preliminary review** of the application.
- Remaining documents that constitute a complete application **allow OCGA to approve and submit applications** or provide institutional endorsement for hard copy submission.

Minimum Requirements for Review	Requirements for Review, Approval & Submission
Completed EPASS with PI Signature	Completed EPASS with all required signatures
Sponsor Guidelines	Sponsor Guidelines
All Sponsor forms requiring OCGA signature	Final Proposal (budget, science, agency required signatures, biosketches, etc.)
Final Budget with Budget Justification	Subaward Documents (if applicable)
Brief description of the proposal aims or proposal abstract	PI Exception Letter (if applicable)
Subaward Documents (if applicable)	Signed/Completed COI forms (if applicable)

Managing Subawards – PI Responsibilities

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

PIs will 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

The image shows a sample invoice from BruinBuy Plus. It includes a header with the BruinBuy logo and the word 'INVOICE'. Below this, it lists the 'BILLED TO' information: Inani Olowe, +123-456-7890, 63 Ivy Road, Hawkville, GA, USA 31036. The invoice number is 12345 and the date is 16 June 2025. A table follows with columns for Item, Quantity, Unit Price, and Total. It lists three items: Eggshell Camisole Top (1 unit, \$123), Cuban Collar Shirt (2 units, \$127), and Floral Cotton Dress (1 unit, \$123). The subtotal is \$373, and the tax is \$27, for a total of \$400. Below the table, it says 'Thank you!'. At the bottom, there is a 'PAYMENT INFORMATION' section with details for Briard Bank, Account Name: Samira Hadid, Account No.: 123-456-7890, and Pay by: 5 July 2025. The address 123 Anywhere St., Any City, ST 12345 is also listed.

Item	Quantity	Unit Price	Total
Eggshell Camisole Top	1	\$123	\$123
Cuban Collar Shirt	2	\$127	\$254
Floral Cotton Dress	1	\$123	\$123
Subtotal			\$373
Tax (0%)			\$27
Total			\$400

Thank you!

PAYMENT INFORMATION
Briard Bank
Account Name: Samira Hadid
Account No.: 123-456-7890
Pay by: 5 July 2025

Samira Hadid
123 Anywhere St., Any City, ST 12345

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.

BruinBuy Plus

Fund: 51409 (UCLA FDN/IRMA AND NORMAN SWITZER FUND TO): (All Values)
Approval Request for Invoice# I144501645

Dear PI Approver,
The Invoice listed below has been submitted for your approval.

Summary

Folder:	Fund: 51409 (UCLA FDN/IRMA AND NORMAN SWITZER FUND TO): (All Values)
Invoice Owner:	Jeff Bromberek
Voucher No.:	I144501645
No. of line items:	1
TOTAL:	5,000.00 USD

Details

Research Subaward
Form Type: Requires Receiving
Item 1 PO Number: 1445000001775
Description: Research Subaward
Vendor: ARIZONA STATE UNIVERSITY
Quantity: 1
Unit Price: 5,000.00 USD
Ext. Price: 5,000.00 USD
Size/Packaging: EA 0.0 / EA
Taxable: No
Capital Expense: No
Commodity Code:
FORM TOTAL: 5,000.00 USD
TOTAL: 5,000.00 USD

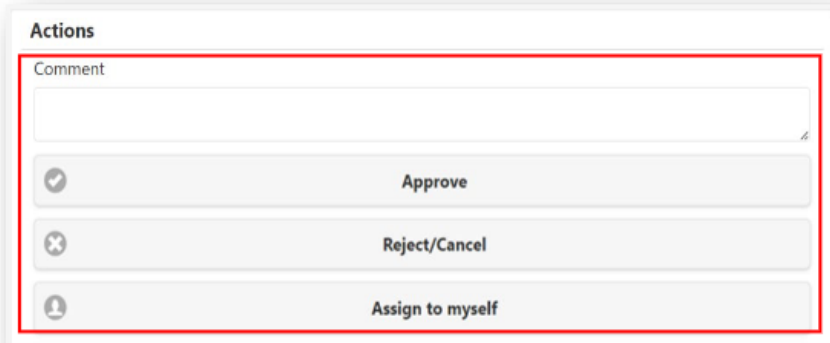
Codes

Accounting Codes
LINE
Location: 0004 : UCLA
Department: 1445 : BIOLOGICAL CHEMISTRY
Account: 441406 : BIOCHEM-FACULTY RESEARCH & SUPPORT
CC: WJ : WJ
Fund: 51409 : UCLA FDN/IRMA AND NORMAN SWITZER FUND TO
Project: -
Object: 7300 : SUBCONTRACTS > \$25K, EXCL FROM OH / IMPROVEMENTS
Sub: 03 : SUPPLIES AND EXPENSE
Source: -
Reference: -
Account Effective: -
Date:

Ready to approve, reject or assign this document to yourself?

Take Action

Approve or Reject Invoice



The screenshot shows a white rectangular panel titled "Actions" with a red border. Inside the panel, there is a "Comment" section with a text input field. Below the comment field are three action buttons, each with a circular icon on the left and text on the right: a checkmark icon for "Approve", an 'X' icon for "Reject/Cancel", and a person icon for "Assign to myself".

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.

BruinBuy *Plus* Training For PI's and PAN Reviewers

<https://purchasing.ucla.edu/bruinbuy-plus-hub>

PAN Reviewer

General



RESOURCE

TYPE

[PAN Reviewer eLearning](#) : access the PAN Reviewer dashboard

ONLINE LEARNING

[PAN Reviewer Guide](#) : complete the PAN review process

QRG

Principal Investigator (PI)

General



RESOURCE

TYPE

[PI eLearning](#) : complete mobile invoice approvals and assign a substitute approver

ONLINE LEARNING

BruinBuy *Plus*



Please be patient with us while we navigate through the new systems/procedures.

Submit far in advance and expect delays.

Keep track of submitted requests and follow-up as needed.

Ordering Supplies

When you need to order supplies, we recommend using one of the approved vendors that already have catalogs with UCLA wherever possible. (These vendors include Amazon, Office Depot, Fisher, Grainger, and more; full list included on later slide)

The next several slides focuses on those types of orders.

You can place these orders in one of two ways:

- Current Way: [Utilizing the Purchase Request Form](#)
- New Option: Creating a Shopping Cart directly on [BruinBuy Plus](#)

Current Way: Purchase Request Form

Requester

- Finds item using general websites/catalogs and makes note of item #'s, cost, unit of measure, etc.
- Obtains Authorizer (PI) approval
- Uses the Purchase Request Form to input FAU, business justification, shipping information, and any other info
- Emails the Purchase Request form to Fund Manager and Valencia

Fund Manager

- Reviews cart for 4 A's (allowability, allocability, availability, accuracy)
- Emails approval to Valencia

Valencia

- Takes info from form and uses it to create a shopping cart in BB+
- Submits the cart and creates the order

New Option: Creating Cart in BB+

Requester

- Creates cart in BB+ using punch-out catalog
- Obtains Authorizer (PI) approval
- Uses the “Internal Note” to input FAU, business justification, shipping information, and any other info
- Assigns cart to Fund Manager

Fund Manager

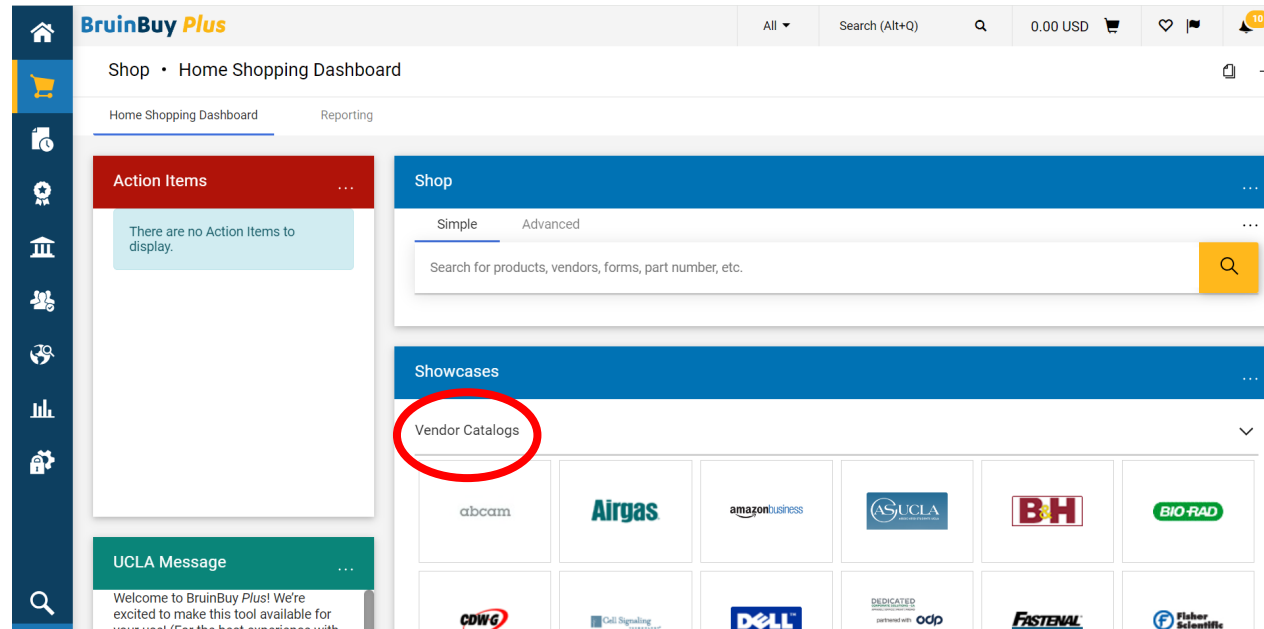
- Reviews cart for 4 A's (allowability, allocability, availability, accuracy)
- Assigns cart to Valencia

Valencia



































- Enters in FAU information, shipping details, and other items from internal notes into the system
- Submits the cart and creates the order

New Option: Creating Cart in BB+

Go to <https://bruinbuyplus.ucla.edu/> and log in



Vendor Catalogs

PunchOut

Cancel PunchOut

(866) 377-2301

customerservice@dcsofca.com

Company List

Favorite

Logout



partnered with **odp** BUSINESS SOLUTIONS™

UCLA Punchout User of UCLA (200001)

HOME

PRODUCTS ▾

ORDER

ACCOUNT

Item(s): 0
SubTotal: 0.00



notepad|



Notepad



FOR ALL YOUR
MRO NEEDS

PunchOut

Cancel PunchOut

Search Filters

Categories (211)

Writing Pads(131)

Office Supplies-Sticky Notes & Flags-Sticky Notes(22)

Paper-Sticky Notes & Flags-Sticky Notes(14)

Planners(11)

Memo & Scratch Pads(7)

Graph Paper(5)

Calendars(5)

Easel Pads(3)

Power & Surge Strips(3)

Organizer Accessories(2)

+

Manufacturers (211)

☐ TOPS Products(90)☐ 3M(34)☐ ACCO Brands Corporation(22)☐ National Industries For the Blind(20)☐ Office Depot(12)☐ Miscellaneous(10)☐ Business Source(6)☐ Dominion BlueLine, Inc(3)☐ Tripp Lite by Eaton(3)

Go

Compare

305466

Office Depot

Office Depot® Brand Perforated Writing Pads, 8-1/2" x 11-3/4" , Legal Ruled, 50 Sheets, White, Pack Of 12 Pads

50 Sheets - 100 Pages - Double Stitched - Legal Ruled - 16 lb Basis Weight - Letter - 8 1/2" x 11 3/4" - Perforated, Bottom Side Opening, Durable, Sturdy - Recycled - 12 / Pack
Availability: 692



- 16-lb paper provides durability for everyday writing tasks.
- Office Depot writing pads feature a perforated design. Perforated writing pads make it easy to tear off a sheet and take it with you.
- 30 pt chipboard back provides sturdy support to the writing pad to create an even surface for writing and note taking.
- Durable binding is double stitched to ensure long-lasting use and minimize wear and tear.
- White perforated writing pads are legal ruled (50 sheets) and come in a pack of 12.
- Eco-conscious choice - has one or more meaningful eco-attributes or eco-labels.
- Recycled content - Product contains 13% total recycled content, including 13% postconsumer content, helping you save resources and reduce

Quantity:

Add To Cart

\$6.65 / P

PunchOut

Cancel PunchOut

Search Filters

Categories (211)

Writing Pads(131)
Office Supplies-Sticky Notes & Flags-Sticky Notes(22)
Paper-Sticky Notes & Flags-Sticky Notes(14)
Planners(11)
Memo & Scratch Pads(7)
Graph Paper(5)
Calendars(5)
Easel Pads(3)
Power & Surge Strips(3)
Organizer Accessories(2)
+

Manufacturers (211)

☐ TOPS Products(90)
☐ 3M(34)
☐ ACCO Brands Corporation(22)
☐ National Industries For the Blind(20)
☐ Office Depot(12)
☐ Miscellaneous(10)
☐ Business Source(6)
☐ Dominion BlueLine, Inc(3)
☐ Tripp Lite by Eaton(3)
☐

Compare

305466

Office Depot

Quantity:

Office Depot® Brand Perforated Writing Pads, 8-1/2" x 11-3/4" , Legal Ruled, 50 Sheets, White, Pack Of 12 Pads

50 Sheets - 100 Pages - Double Stitched - Legal Ruled - 16 lb Basis Weight - Letter - 8 1/2" x 11 3/4" - Perforated, Bottom Side Opening, Durable, Sturdy - Recycled - 12 / Pack
Availability: 692



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- Durable binding is double stitched to ensure long-lasting use and minimize wear and tear.
- White perforated writing pads are legal ruled (50 sheets) and come in a pack of 12.
- Eco-conscious choice - has one or more meaningful eco-attributes or eco-labels.
- Recycled content - Product contains 13% total recycled content, including 13% postconsumer

Added to Cart



Office Depot Brand Writing Pads, 8-1/2" x 11-3/4", Legal/Wide Ruled, 50 Sheets, White, Pack Of 12 Pads (305466)

~~\$8.85~~

[Review & Checkout](#)
[Continue Shopping](#)

PunchOut

Cancel PunchOut

Product

Manufacturer

Price

UOM

Qty

Ext Price

Actions



305466

OFFICE DEPOT

\$6.65

PK

\$13.30



Save For Later

Office Depot Brand Writing Pads, 8-1/2" x 11-3/4", Legal/Wide Ruled, 50 Sheets, White, Pack Of 12 Pads

Message:



Project:

Budget:



+ Add more items

Update

Save

Clear Cart

Shop Cart Name

PO Number

Budget



Enter Message for your company's Approver to view, this is only visible if you use our Order Approval system.

Punchout Login - DO NOT TOUCH

Order Summary

Items

1

SubTotal:

\$13.30

[Proceed To Checkout](#)

Shopping Cart • Shopping Cart

Assign Cart

Proceed To Checkout

Simple

Advanced

Search for products, vendors, forms, part number, etc.

Cart Name

2024-03-06 803256635 01

Description

Prepared for

LAURA SHEEHAN



User Search

Last Name

moody

First Name

valencia

User Name

Email

Business Unit

Business Unit Name

Department

Search

Close

Summary

Details

For

LAURA SHEEHAN

Total (14.56 USD)

Shipping, Handling, and Tax charges are calculated and charged by each vendor. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal ★ 13.30

Tax1 1.26

Use Tax 0.00

Total ★ 14.56

2 Items

Dedicated Corporate Solutions of CA, Inc. • 2 Items • 13.30 USD

VENDOR DETAILS E FC-001 : 119 E Saint Joseph St, Arcadia, California 91006-2852 United States

Contract no value

PO Number To Be Assigned



Shopping Cart • Shopping Cart




Assign Cart

Proceed To Checkout

User Search




New Search

Name ↑	User Name	Email	Phone	Action
BURNS MOODY, VALENCIA	204284777	vmood@mednet.ucla.edu	+1 310-794-8952	

Close

2 Items

Dedicated Corporate Solutions of CA, Inc. • 2 Items • 13.30 USD

^ VENDOR DETAILS  E FC-001 : 119 E Saint Joseph St, Arcadia, California 91006-2852 United States

Contract no value

PO Number To Be Assigned

Tax1	1.26
Use Tax	0.00
Total ★	14.56

Shopping Cart • Shopping Cart



Assign Cart

Proceed To Checkout

Simple

Advanced



Search for products, vendors, forms, part number, etc.



Cart Name

2024-03-06 803256635 01

Description

Prepared for

VALENCIA BURNS MOODY



2 Items



Dedicated Corporate Solutions of CA, Inc. • 2 Items • 13.30 USD



⤴ VENDOR DETAILS  E FC-001 : 119 E Saint Joseph St, Arcadia, California 91006-2852 United States

Contract no value

PO Number To Be Assigned

Summary



Details



For

LAURA SHEEHAN

Total (14.56 USD)



Shipping, Handling, and Tax charges are calculated and charged by each vendor. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal ★	13.30
Tax1	1.26
Use Tax	0.00
Total ★	14.56

Shopping Cart • Shopping Cart



Assign Cart

Proceed To Checkout

Quote number

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1 Office Depot Brand Writing Pads, 8-1/2" x 11-3/4", Legal/Wide Ruled, 50 Sheets, White, Pack Of 12 Pads	305466	PK - PACK	6.65	Qty: 2 PK - PACK	13.30	<input type="checkbox"/>

ITEM DETAILS

Manufacturer Name OFFICE DEPOT

Contract:

Vendor Part

Taxable



Auxiliary ID

VibeShopCartLineID_480796

Commodity Code

4700



Office Supplies

[more info...](#)

Line Item Type

None



Internal Note

441435-JB-12345.
Proj Coordinator for ABC study will utilize these notepads to keep track of participant questions during focus groups.

863 characters remaining

[expand](#) | [clear](#)

External Note

1000 characters remaining

Summary



Details



For

LAURA SHEEHAN

Total (14.56 USD)



Shipping, Handling, and Tax charges are calculated and charged by each vendor. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal



13.30

Tax1

1.26

Use Tax

0.00

Total



14.56

Assign Cart: User Search

Assign Cart To:

no value

or [SEARCH](#)

Note To Assignee:

Dr. Bruin approved this purchase during our project meeting on 3/3/24.

Assign

Close

Note

1000 characters remaining



BruinBuy Plus

Shopping Cart • Shopping Cart

Quote
number

Item

- 1 Office Depot Brand Writing Pads, 8-1/2" x 11-3/4", Legal/Wide Ruled, 50 Sheets White, Pack Of 12 Pads

ITEM DETAILS

Manufactur
er Name OFFICE DEPOTVendor
Part
Auxiliary ID
VibeShopCartLineID_480796[more info...](#)

User Search

Last Name

ashikyan

First Name

christine

User Name

Email

Business
Unit

Business Unit Name

Departmen
t

Search

Close

14.56 USD



Assign Cart

Proceed To Checkout

Summary

Details

For

LAURA SHEEHAN

Total (14.56 USD)

Shipping, Handling, and Tax charges are calculated and charged by each vendor. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	13.30
Tax1	1.26
Use Tax	0.00
Total	14.56



Shopping Cart • Shopping Cart



Assign Cart

Proceed To Checkout

Quote

User Search



New Search

Name ↑	User Name	Email	Phone	Action
ASHIKYAN, CHRISTINE	806334734	cashikyan@mednet.ucla.edu		<div>+</div>

Close

[more info...](#)

Line Item
Type

None ▾

External
Note

863 characters remaining
[expand](#) | [clear](#)

1000 characters remaining

Tax1	1.26
Use Tax	0.00
Total ★	14.56





BruinBuy Plus

Shopping Cart • Shopping Cart

Quote
number

Item

- 1 Office Depot Brand Writing Pads, 8-1/2" x 11-3/4", Legal/Wide Ruled, 50 Sheets White, Pack Of 12 Pads

ITEM DETAILS

Manufactur
er Name OFFICE DEPOTVendor
Part
Auxiliary ID
VibeShopCartLineID_480796[more info...](#)

User Search

Last Name



ashikyan

First Name



christine

User Name



Email

Business
Unit

Business Unit Name

Departmen
t

Search

Close

14.56 USD



Assign Cart

Proceed To Checkout

Summary



Details



For

LAURA SHEEHAN

Total (14.56 USD)



Shipping, Handling, and Tax charges are calculated and charged by each vendor. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal ★ 13.30

Tax1 1.26

Use Tax 0.00

Total ★ 14.56

Assign Cart: User Search

Assign Cart To:

ASHIKYAN, CHRISTINE

or [SEARCH](#)

☐

Note To Assignee:

Dr. Bruin approved this purchase during our project meeting on 3/3/24.

Assign

Close

Note

1000 characters remaining



Simple

Advanced



Search for products, vendors, forms, part number, etc.



Cart Assigned

Requisition Summary

Requisition number	183797830
Cart name	2024-03-06 803256635 01
Requisition total	14.56 USD
Number of line items	1

Options

- [Create new draft cart](#)
- [Recent orders](#)
- [Return to your home page](#)

Punch-out Cart Process Review

Requester

- Creates cart in BB+ using punch-out catalog
- Obtains Authorizer (PI) approval
- Uses the “Internal Note” to input FAU, business justification, shipping information, and any other info
- Assigns cart to Fund Manager

Fund Manager

- Reviews cart for 4 A's (allowability, allocability, availability, accuracy)
- Assigns cart to Valencia

Valencia

- Enters in FAU information, shipping details, and other items from internal notes into the system
- Submits the cart and creates the order

General Purchasing Guidance

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.

There are some types of purchases that used to require a PO that can now be paid using the "direct pay" feature, and we've covered those in previous research meetings (e.g. utility invoices, guest speaker fees, memberships, etc.)

If you are trying to buy a tangible item, using a vendor that has a punch-out catalog is the easiest, and we've just described how to do that.

General Purchasing Guidance

But what if there is no punch-out catalog, or if I'm not trying to pay for a tangible item, but rather a service?



General Purchasing Guidance

For some of those, we are allowed to pay using the **Pcard** (must be domestic vendors):

- Abstract or Journal Publication Fees
- Advertisements
- Appreciation Gifts
- Books
- Certification Fees
- Conference Fees
- Office Supplies
- Subscriptions
- Online webinars/courses
- License renewals
- Some vendors: Iron Mountain, Fedex, Cintas, Linde, etc.



General Purchasing Guidance

If we can't order using the PCard and there isn't a punch-out catalog, we will need to create a requisition and procurement will need to review it before the PO will be generated.

Vendors that have campus-wide agreements (previously known as K-agreements) already have negotiated T&C in place, and so the procurement review process will be shorter. The full list of those vendors can be found at <https://purchasing.ucla.edu/strategic-sourcing/contracts>, and include vendors like:

- QIAGEN
- Salesforce
- Apollo Couriers
- Calico Custodial Services
- Tangram Interiors
- Owens & Minor
- CPM One Source
- Castle Press
- Stericycle/Shred-It
- Lyft

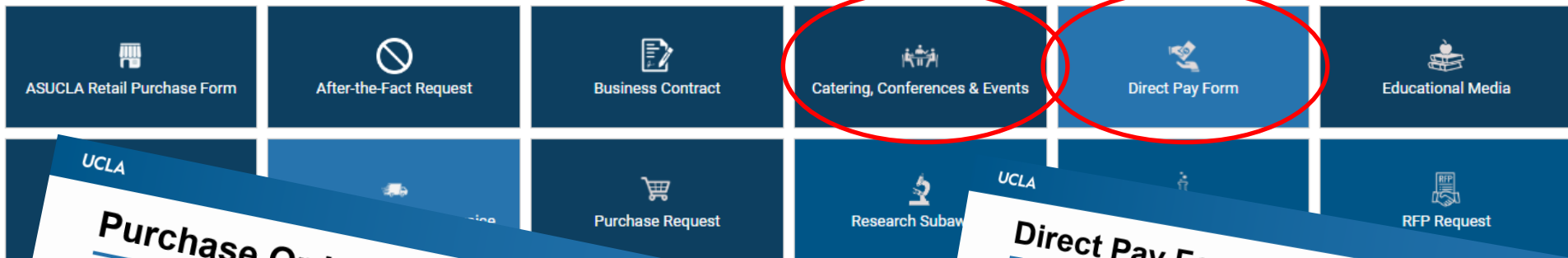
General Purchasing Guidance

If the vendor doesn't already have a campus-wide agreement, it will take a bit longer, but we can still submit the requisition and if it passes procurement review, they will generate a PO.

The process to create a requisition/PO for both vendors with and without campus-wide agreements is the same as it's been:

Create a Purchase Request Form, get PI/approver approval, submit to your fund manager and Valencia for processing.

Previous Monthly Research Unit Meeting Slides



Purchase Order for Catering/Entertainment

1. Reach out to the vendor of your choice
 - Ensure they will accept PO's and are registered w/ UCLA PaymentWorks
 - Discuss your event needs and obtain a quote
 - Find out what email to send the Purchase Order to
2. Complete the [Entertainment Worksheet](#)
 - Leave "Purchase Order" blank
 - Invoice # can be a reservation number or Quote #
3. Email your fund manager and Valencia
 - In the body of the email, we need the following:
 - FAU
 - Business Justification
 - Is this a federal funding source? Yes/No
 - Email to send the PO to
 - Attach the agenda or invitation (required)
 - Attach the quote (required)

UCLA
Travel Accounting

ENTERTAINMENT WORKSHEET
2023

PO/VOL: _____
Contact Person/Ex: _____
Invoice Number: _____
Date of the Event: _____
Number of Attendees: _____
Dean's or Executives in Attendance: _____

ITEMS Considered in Price Per Person Calculations

ITEM	AMOUNT
Drinks	
Food	
Bar/Barbers	
Charts	
Catering	
Seating/Waitstaff	
Staff	
Private Food and/or Beverage	
Administrative Fee	
Delivery Fees/Storage	
Sales Tax	
Service Charges and/or Surcharge	
Tips	
Other	
Total	

ITEMS NOT Considered in Price Per Person Calculations

ITEM	AMOUNT
AV Rental	
Bar Set Up	
Decorations	
Event Coordinators	
Event Signage	
Floral Arrangements	
Linen	
Parking	
Place Settings	
Room Rental	
Valer	
Sales Tax	
Other	
Other	
Total	

Direct Pay Form

This is only for invoices that do not require a purchase order, including:

- Awards (Recognition of past activities) - Non-Employees only
- Fellowships and Scholarships
- Honorarium
- Human Subject Payments
- Memberships
- Non-Matriculated Student Payments
- Prizes (Competition) - Non-Employees only
- Refunds (Entities only)
- Royalty Payments
- Subscriptions (non-software)
- Transient Occupancy Tax Payments
- Utility payments

Previous Monthly Research Unit Meeting Slides

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

There are 4 types of gift cards you can order; be sure you are following the correct guidance for the type of GC you would like to purchase:

- [IRB Approved Research Payment Request](#)
- [Non IRB Research Payment Request](#)
- [Employee Recognition Request](#)
- [Non-Employee Disbursement Request](#)

Gift Card Types:	Research Payment Request (IRB Approved)	Research Payment Request (IRB determined approval not required)	Employee Recognition Request (ERRP)	Non-Employee Disbursement Request
<i>Description</i>	<p>Disbursement requests for research payments that are approved by the Institutional Review Board (IRB).</p> <p><i>Must provide current IRB approval number.</i></p>	<p>Disbursement requests for research payments that are not approved by the Institutional Review Board (IRB) but still qualify as a research payment.</p> <p><i>Must provide OHRPP rejection letter, scope of work, and budget.</i></p>	<p>Disbursement requests for the Employee Recognition and Reward Program (ERRP) in which non-cash awards are distributed for the purchase of goods (not services).</p>	<p>Disbursement requests for non-cash awards presented to non-employees (see UC Policy G-42)</p>
<i>Forms of Payment</i>	<p>Gift cards/e-codes Bruincard deposits Cash Max amount: \$5,000</p>	<p>Gift cards/e-codes Bruincard deposits Cash Max amount: \$5,000</p>	<p>Gift cards/e-codes Bruincard deposits Max amount: \$75 per award/employee</p>	<p>Gift cards/e-codes Bruincard deposits Max amount: \$600 per individual</p>
<i>Instructions</i>	IRB Approved Research Payment Request	Non-IRB Research Payment Request	How to Submit an Employee Recognition Request	How to Submit a Non-Employee Disbursement Request

Fund Manger Updates

We have successfully hired a new fund manager!

Lois Hernandez will start April 1



Upcoming Meetings/Events

- Next Research Unit Meeting: April 4
- Next Grand Rounds: March 22, 2024
- Prior monthly meeting agendas/slides are 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/Oppenheim Suite Employees](#)
- [Travel/Entertainment/Food Reimbursement Request Guide](#)
- [Purchase Guide](#)
- [Accounts Payable Training](#)
- [Purchase Process](#)
- [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 grant deliverables page? Check out the Accounts Payable website for forms like Check Requests, Petty Cash Expenditures, IRS 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
