Meeting Agenda

- **Welcome and Announcements**
  - Marcia Smith, Office of Research Administration

- **Office of Intellectual Property & Industry Sponsored Research - New Website and Submission Processes**
  - Brian Roe, Assistant Director, ISR and MTA
  - Mougeh Mozafarian, MTA Manager
  - Jeff Nerdin, Industry and Material Transfer Contract Officer
  - Jessica Lee, ORIS

- **RAPID Project Update: Financial Reporting Project Functional Team Report**
  - Maurice Taylor, EFM
  - Rory Constancio, Graduate School of Education and Information Studies

- **Update on ARRA Reporting**
  - Terry Novorr, NPI
  - Neda Navab, SOM

- **Questions and Discussion**
ORA Announcements

- Holiday and Furlough Closures:
  - Wednesday, November 25, 2009 through Sunday, November 29, 2009
  - Saturday, December 19, 2009 through Sunday, January 3, 2010
  - See ORA deadlines on November 5th notice to campus
ORA Announcements

- RA Forum Meeting Dates for 2010 – Thursdays from 10-11:30 am:
  - December 10, 2009
  - January 14, 2010
  - February 11
  - March 11
  - April 8
  - May 13
  - June 10

- NIH Continuing Resolution and funding of non-competing continuations at ~ 90% of committed level
Changes to NIH Applications

Major changes for due dates on or after January 25, 2010

- Restructured application forms
- New instructions including shorter page limits
- For ALL competing applications:
  - New
  - Renewal
  - Resubmission
  - Revision
Changes to NIH Applications

Special Meeting/Information Session

November 19, 2009
1:30 - 3:00 p.m.
Louis Jolyon West Auditorium
Semel Institute, Room C-183

*Investigators and research administrators are encouraged to attend*
Update from Office of Intellectual Property and Industry Sponsored Research

New Website Submission Processes

• Brian Roe, Assistant Director, ISR and MTA
• Mougeh Mozafarian, MTA Manager
• Jeff Nerdin, Industry and Material Transfer Contract Officer
• Jessica Lee, ORIS
Office of Intellectual Property & Industry Sponsored Research

New Website and Submission Processes

Office of Intellectual Property and Industry Sponsored Research
11000 Kinross Ave. Suite 200
Los Angeles, CA 90095-1406
New Website!

http://www.oip.ucla.edu/
Agenda

- Why the NEW onlineMTA?
- Overview of onlineMTA
- Live Demo of onlineMTA smartform
- Launch Details
- Q&A
Why the new **onlineMTA**?

- OIP-ISR reviews approximately 1,000 Material Transfer Agreements each year.

- This number is double what it was four years ago, and the number of transactions is expected to continue to rise in future years.

  ➔ **onlineMTA** makes the process for submitting material transfer requests more **EFFICIENT** for PIs and their staff.

  ➔ **onlineMTA** also makes the review process more **EFFICIENT** for OIP-ISR and thereby allows us to provide quicker turnaround time.
Overview of onlineMTA

- onlineMTA is an electronic “workspace” for management of Material Transfer Agreements.
- onlineMTA Features:
  - Web-based Material Transfer Request “smartform.”
  - Tracking of MTA status: smartform submission, MTA review, negotiation, and finalization.
  - Automatic email notifications to PIs and campus entities (e.g. ESCRO and EH & S).
  - Access Material Transfer Agreements from FY2010 on.
Live Demo of onlineMTA smartform

- UCLA PI Dr. Joe Bruin is requesting Material from USC

- Dr. Bruin would like to obtain the Material “Kryptonite” from Dr. Tommy Trojan for research involving knock-out super mice

- Dr. Bruin has asked his administrative assistant to complete the onlineMTA smartform for this transfer of Material.
Logging in to onlineMTA

→ Access onlineMTA from OIP-ISR website

→ Login with your UCLA Logon ID
Launch Details

- Launch Timeframe: Mid Dec 2009

- User Access: UCLA Logon ID
  - https://logon.ucla.edu/

- Training
  - PI training course November 19, 2009
  - Contact MTA team for schedule of additional On Campus PI & Staff Training Classes

- Once launched, the paper form will NOT be accepted

- Questions: uclamta@research.ucla.edu
Thank You!

Q & A
RAPID Project Update

Financial Reporting Project:
Functional Team Report

- Maurice Taylor, Extramural Fund Management
- Rory Constancio, Graduate School of Education

Functional Team Leads
Functional Team Goals and Objectives

- Develop functional requirements for a single web-based system that supports financial reporting for the campus research community.
- Streamline the reporting process and standardize financial data shared between campus department and central offices.
- Add value to an in-house developed system that delivers timely financial reports to sponsors.
- Improve communication through transparency, accountability, and responsibility.
Key Components

- Award Set-up
- Fund Assignment
- Budget and Re-budget allocation
- Salary Caps
- Cost Sharing
- Cost Analysis
- Cost Adjustments
- F & A set-up
- F & A Reconciliation
- Sub-award & contracts
- Closeout
- Reporting
Functional Team Goals and Objectives

- Develop functional requirements for a single web-based system that supports financial reporting for the campus research community.
- Streamline the reporting process and standardize financial data shared between campus department and central offices.
- Add value to an in-house developed system that delivers timely financial reports to sponsors.
- Improve communication through transparency, accountability, and responsibility.
System Notifications/Alerts

- Advance Notices for Reporting
- Past Due Notifications
- Spending Alerts (burn rates)
- Flags for Unallowable Cost
- Flags for Inapplicable Cost
- Management Alerts
- Automated Closing Forms
Team Leader Roles

- Coordinate and facilitate the overall work plan to achieve team goals.
- Schedule and facilitate meeting; communicate meeting summaries.
- Assess and track work progress.
- Work closely with the technical team to identify priorities and critical paths.
Sub-Team Purpose & Goals

- Streamline development of the functional requirements, using small focus groups.
- Concentrate more on key areas for the system build-out.
- Identify and document functional requirements for each task for review and comment by larger group.
Sub-Teams

- **Closeout**: develop report formats and closing steps/process to achieve timely reporting
- **Adjustments**: identify items/types of adjustments & the new approach for timely closeout.
- **Analysis**: develop requirements for unallowables, inapplicables, cost share & salary cap
- **F&A Reconciliation**: examine existing rate structure/tables; define standard versus nonstandard rates & basis.
Sub-team Updates and Highlights

- **Closeout:** Proposed standard and short form for financial reporting (possible early release)
- **F&A: Reconciliation:** Presented system comparison of campus departments versus central office process.
- **Analysis:** Suggested automation of system feature to alert users on unallowable/inapplicables & generate adhoc reports; development of cost share system.
- **Adjustments:** Improve monitoring tools for early alert and resolution and eliminate unnecessary after-the-fact adjustments.
Moving Forward

- From Logic to Business, (Policies & Procedures to support the new single system).
- Testing
- Training
- Piloting
Update on ARRA Reporting
Update on ARRA Reporting

- Subaward reports will be collected by OCGA Subaward Team and forwarded to PI and Fund Manager for incorporation into PI report to EFM
- Department deadline for next quarterly report to EFM: December 11, 2009
- Payroll projection to be used to report FTEs for month of December
Update on ARRA Reporting

- Two tools to be made available ASAP: FTE Worksheet and FTE Report
- Announcement to be sent out when these are deployed
- Additional training session may be made available during the OCGA session on NIH applications changes on November 19th
Update on ARRA Reporting

ARRA Reporting Tools

FTE Worksheet
FTE Projections
FTE Report

Terry Novorr, NPI
Neda Navab, SOM
Questions and Discussion