EFM Updates

Kevin Cook
Interim Director, EFM
Organization Updates
Goals of New Structure

• Create long term relationships departments.
• Streamline existing team structure.
• Provide opportunities for advancement and outline a clear career path.
• Facilitate consistent practices.
• Maximize production output.
• Create a more robust and independent team structure.
Key Decisions Made

- **Managers**
  - Jovan Iglesias
  - Jevon Echave
  - Jen Ear
  - Jennifer Aguilar

- **Accountants**
  - Franchesca Kim

- **Team Assignments**

- **Department Assignments**
Cash and Compliance Team
Fund Management Team

- Yoon Lee
  Assoc Director
- Jevon Echave
  Team 1
  - Brian Adienza
  - Christian Diaz
  - Vivan Juaner
  - Isabella Hernandez
  - Victor Hong
  - Myra Alvarez
  - Stephanie Vischansky
  - Denise Wong
- Jen Ear
  Team 2
  - Veronica Fuentes
  - Acct III - Vacant
  - Katie Cadle
  - Steven Choi
  - Acct II - Vacant
  - Simora Brooks
  - David Maybach
  - Carmen Ho
  - Janine Lui
- Jennifer Aguilar
  Team 3
  - Linda Finley
  - Franchesca Kim
  - Hari Wikesekera
  - Grace Agustin
  - Emerson Tat.
  - Robert de Jesus
  - Ruth Hwang
  - Marina Babaian
  - Acct I - Vacant
PAMS
Agenda

• PAMS Pilot
  ▪ Successes

• Campus Deployment
  ▪ Timeline
  ▪ Scope
Pilot Success

• We wouldn’t be here without our Pilot users!
  ▪ Providing feedback
  ▪ Identifying bugs
  ▪ Suggesting enhancements and improvements

Thank You!
Pilot Success

- 22 Completed Closeout Packets
Pilot Success

- 22 In Process Closeout Packets

In Process Closeout Packets

- Physiology: 4
- Physics & Astronomy: 3
- Pathology Department: 3
- Computer Science: 3
- Medicine-Nephrology: 2
- Microbiology, Immunology: 1
- Health Policy and Management: 1
- Anesthesiology & Perioperative: 1
- Epidemiology: 1
- Surgery Plastic: 1
- Neurobiology: 1
- Mechanical Aerospace Engineer: 1
Campus Deployment

- Fall/Winter 2014 Release
- Approximately 4 month roll out in multiple waves
- Online training module
Campus Deployment

- Customized worklist for the individual user to prioritize work and monitor progress
## Campus Deployment

- Workload management for team/department managers

![Search For Funds - Campus Deployment](image)

**Search For Funds**

<table>
<thead>
<tr>
<th>FILTERS</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Fund #</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UCLA PATS No.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Type:</td>
<td>ALL</td>
<td>ALL</td>
</tr>
<tr>
<td>Category:</td>
<td>ALL</td>
<td></td>
</tr>
<tr>
<td>Responsible For:</td>
<td>Action Required Only</td>
<td>HWANG, RUTH</td>
</tr>
<tr>
<td>Status:</td>
<td>ALL</td>
<td></td>
</tr>
<tr>
<td>Organization:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Division:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department Code:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Home PI:</td>
<td>Missing Managing PI Only</td>
<td></td>
</tr>
<tr>
<td>Sponsor Name:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sponsor Award #:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

[EFM Logo]
Campus Deployment

- Access to financial reports and invoices, correspondence, and historical information in a single integrated system
Campus Deployment

• Next Steps
  ▪ PAMS Help will contact departments when it is time to gain access
  ▪ Fill out Access Form
  ▪ Take training
PAMS Help

Questions or Feedback?

Contact PAMS Help!

- (310) 794-0008
- PAMSHelp@research.ucla.edu
ERS Updates
Effort Reporting Statistics

- As of 9/10/14
  - UCLA’s Campus Rate (Spring’06 - Winter’14)
    - 99% Certified
  - Fall 2013 & Winter 2014 deadline, 7/29/14:
    - On-Time Rate - 90%
  - Fall 2013 and Winter 2014 to date:
    - Current Rate – 92.5%
Historical On Time Certification Rates

- Spring & Summer '10: 74%
- Fall '10 & Winter '11: 80%
- Spring & Summer '11: 70%
- Fall '11 & Winter '12: 74%
- Spring & Summer '12: 82.5%
- Fall '12 & Winter '13: 83%
- Spring & Summer '13: 78%
- Fall '13 & Winter '14: 90%
# Effort Reporting Crusade

## Phase 1

<table>
<thead>
<tr>
<th>Academic Year</th>
<th>Fall</th>
<th>Winter</th>
<th>Spring</th>
<th>Summer</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Cert Rate</td>
<td>Cert #</td>
<td>Open #</td>
<td>Cert Rate</td>
</tr>
<tr>
<td>2005-2006</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>2006-2007</td>
<td>99%</td>
<td>6110</td>
<td>1</td>
<td>99%</td>
</tr>
<tr>
<td>2007-2008</td>
<td>99%</td>
<td>5825</td>
<td>3</td>
<td>99%</td>
</tr>
<tr>
<td>2008-2009</td>
<td>99%</td>
<td>5826</td>
<td>6</td>
<td>99%</td>
</tr>
<tr>
<td>2009-2010</td>
<td>99%</td>
<td>6477</td>
<td>7</td>
<td>99%</td>
</tr>
<tr>
<td>2010-2011</td>
<td>99%</td>
<td>6524</td>
<td>23</td>
<td>99%</td>
</tr>
<tr>
<td>2011-2012</td>
<td>98%</td>
<td>6121</td>
<td>93</td>
<td>98%</td>
</tr>
<tr>
<td>2012-2013</td>
<td>92%</td>
<td>5308</td>
<td>458</td>
<td>91%</td>
</tr>
</tbody>
</table>

## Phase 2

<table>
<thead>
<tr>
<th>Academic Year</th>
<th>Fall</th>
<th>Winter</th>
<th>Spring</th>
<th>Summer</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Cert Rate</td>
<td>Cert #</td>
<td>Open #</td>
<td>Cert Rate</td>
</tr>
<tr>
<td>2005-2006</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>2006-2007</td>
<td>100%</td>
<td>6111</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>2007-2008</td>
<td>100%</td>
<td>5829</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>2008-2009</td>
<td>100%</td>
<td>5832</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>2009-2010</td>
<td>99%</td>
<td>6484</td>
<td>1</td>
<td>99%</td>
</tr>
<tr>
<td>2010-2011</td>
<td>99%</td>
<td>6537</td>
<td>12</td>
<td>99%</td>
</tr>
<tr>
<td>2011-2012</td>
<td>99%</td>
<td>6174</td>
<td>42</td>
<td>99%</td>
</tr>
<tr>
<td>2012-2013</td>
<td>97%</td>
<td>5637</td>
<td>138</td>
<td>97%</td>
</tr>
<tr>
<td>2013-2014</td>
<td>93%</td>
<td>5014</td>
<td>348</td>
<td>92%</td>
</tr>
</tbody>
</table>

- 9/10/14: 12,421 Open
- 11/14/13: 55 Open
- 9/10/14: 1,060 Open
ERS Announcements

- Spring and Summer 2014 reports will be released in Mid-October 2014.

- ERS Training Course
  - Date: Wednesday, October 29th
  - Time: 9:00 a.m. - 3:00 p.m.
  - Place: Wilshire Center, 10th Floor
  (Sign-up through LMS)
ERS Support

• Outreach Support
• Help Desk: ershelp@research.ucla.edu
  ▪ Connie Brown
  ▪ Leticia Calderon
Q&A
“SEE YOU AT 100%!!!”