Department of Medicine  
RFA Monthly Meeting  
June 20, 2013  
9:00 am – 10:30am, Parnassus Heights Campus

Present: Christine Razler, Lily Luu, Susan Lau, Traci Cho, Marissa Meyer, Christianmichael Dutton, Nichol Fernandez, Annie Mar, Pat Wirattigowit, James Kang, Herman Ma, Lynn Ha, Lidia Espino, Joan U, Kellie Leung, Calvin Kwok, Tony Yu, Benjamin Hobson, Lynda Tran, Victoria Lee, Susana Szeto, Joanne Dang, Fred Buenaventura, Eric Wu, Heidy Ruano, Nancy Huynh, Michael Chen

Announcements/Updates

Two new RFA’s:

Nichol Fernandez (ARFA) will be organizing the RFA meetings, taking the minutes and training to be an RFA. She is eager to take on any projects any of you may have.

Traci Cho is the RFA who is now working in Infectious Disease (ID), following Susan Lau.

The Contracts and Grants Division (C&G), Research Management Services (RMS), and the Office of Sponsored Research (OSR) are merging their operations. The award acceptance team analysts will be moving into RMS. The whole RMS/C&G process of pre-award and award acceptance is going to be rebuilt from start to finish. The goal is for awards to get processed quicker and with fewer mistakes. An outside consultant came to look at our institutional workflow processes and found there is a huge communication gap around the conflict of interest reporting, too many miscommunications and internal hand-offs, and late award set-ups. Also, there were many errors in the CACTUS use.

CACTUS is a system that tracks the award. Anyone may request “view only” access. At an upcoming meeting, we may have trainers train us on how to navigate the system. Those who do not have access at this time, please send an email to John Radkowski to request view only access to CACTUS.

Michael Chen - COA Update

Starting July 1, 2013, there will be a big change in the ledger. Traditionally, in our accounting system, your money is in the budget column and your expenses are in the financial column, this will remain true for sponsored awards, but for non-sponsored funds, we’re in the transition of getting rid of the budget column, beginning July 1st. Where will the money go? The department is in the process of doing journals, where we are zeroing out the budget column on all non-sponsored funds and doing a financial (535) journal to put the balance of your money in a revenue NCA account, 119850. In the next couple of weeks during fiscal close, for non-sponsored funds, including gift funds, you will see the balance zero out and a new entry in the financial column under NCA expense 119850.

There will no longer be a “DPA NOT USED” for non-sponsored funds.

For any fund where with only one DPA, the campus will do a journal (not the department). Starting July 1st, the balance in the DPA will be moved to the financial column.

For funds that you own in your divisions by depcode, the department will be doing the journals. For awards you may manage where the fund is owned by another department and coupled to your depcode, that department will be responsible for preparing the journal to move budgeted amounts out of the budget
column. It’s possible, if you’re not the fund owner, you will not see the funds on your ledger (dpa) as the owning department may not move budget amounts to the dpa level.

Michael proposed that the department should send out a list of balances for funds where we don’t own the fund, but we own the dpa, so we can be alert that these are funds/dpa’s that we need to be aware of.

There is a new **Chart of Accounts (COA) Readiness Tool** – To view the Readiness Tool Link:

http://controller.ucsf.edu/finance3/dr/

Division Administrators may ask RFA’s to assist with confirming COA conversions – For the last several months the department has been mapping all the existing funds/dpa’s and chartstrings for our current COAs to the new COAs and has been coordinating with all of the divisions. The department has converted data all the way thru the March 2013 GL. We are asking divisions (including RFAs) to confirm the conversion decisions. For example, in terms of managing gift awards, we gave names to gift funds, faculty discretionary accounts, etc.

**Lily Luu’s Presentation – Online Collaborative Research Environment (OnCore)** - How cancer-related studies will get entered into OnCore. **Please see the attached PowerPoint presentation.**

Christine’s announcements regarding OnCore:

For industry-sponsored non-cancer clinical trials, PI’s are staring to work with the clinical trials budgeting group and Industry Contracts. The first step is to go online to the clinical trials budgeting group and complete an intake form, which asks questions about the study and they will enter the information into OnCore and help develop the budget and prepare a Medicare Cost Analysis (CA). The CTSBC analyst will connect the PI to a contract officer who will begin review of the Clinical Trial Agreement language. The requirement for a CA for all clinical research is now being enforced. It is a requirement for all clinical research, that has patient care costs thru the medical center to be reviewed to determine whether the procedures are standard of care (SOC) procedures that should be billed to insurance, another third party, or whether they are completely research related. If the funding source is NIH or a private foundation, the RMS will work directly with the clinical trial budgeting group to get the CA completed, which will help build their budget. It is a medicare compliance issue that all CA is complete for all research studies. The use of OnCore well help assure that studies are managed in a consistent way across the campus.

**Next Meeting Topics:**

DOM A-21 Audit 2012 data and 2013 preparation

**Upcoming RFA Meetings**

July 18, 2013 from 9:00 – 10:30 am in Lhts 376
August 2013 – **No Meeting**
September 19, 2013 TBD
**October Annual Retreat TBD**
November 21, 2013 TBD
December 19, 2013 TBD