

**Department of Medicine**  
**RSA Monthly Meeting**  
**July 19, 2007**  
**8:30-10:00 AM, Laurel Heights 416**

**Present:** Debra Allen, Connie Archea, Michele Carter, Alice Chin, Helen Chuan, Raymond Fong, Annie Handajani, Catherine Hoselton, Lowell Huang, Calvin Kwok, Nyaa Lark, Karen Lau, Anne Lawrence, Victoria Lee, Linda Lew, Samantha Lieu, Marienna Murch, Solat Navab, Wendy Ng, Renuka Sippy, Kim Smith, Mayra Sustaita, Suzanne Sutton, Kapo Tam, Bill Walzer, Joseph Wilson

**Guests:** Mary Banach, Ed Day, Arsenio Roldan, Reynaldo Del Rosario, Kevin Wong

### **Updates**

Although they were due to increase on July 1, 2007, fringe rates have been frozen and will continue at the rate set for the previous fiscal year.

Brett Friberg resigned effective July 12, 2007. Since the Department is not recruiting for the position, his duties have been transferred as follows:

1. Data retrieval from RAS (RSAs and Division Admins, since this data is now available)
2. Data retrieval from C&G database (Suzanne Sutton)
3. Data retrieval from Weblinks Ad Hoc tables (Mee Lang Kwong)
4. Proposal and award reporting (Suzanne Sutton)
5. Collection and comparison of monthly overdraft reports (Michele Carter)
6. Website updates (IT)
7. Access administration for Weblinks (Mee Lang Kwong after review and approval by Karen Lauritzen)
8. Access administration for DOMBO Billing and FACT (Mee Lang Kwong after review and approval by Maye Chrisman)
9. Access administration for RAS, DOMBO RATS and Express, ERS (Mee Lang Kwong after review and approval by Joseph Wilson)
10. Access administration for OLPPS (Mee Lang Kwong after review and approval by JoAnn LaCasse)
11. Distribution of NIH awards and notifications (Michele Carter)
12. Update Funding Opportunities database (Michele Carter)

With the exception of those for the June preliminary, interim, and final ledgers, the monthly emails that Brett previously sent notifying when the closed ledgers were available in Express will no longer be sent.

July's CRC Meeting will cover the new Medical Center policy regarding the implementation of clinical trials, which went into effect July 1, 2007. RSAs are most affected by the reconciliation of the ZZ accounts. Although RSAs are not required to attend this meeting, those from GI, Hem/Onc and Cardiology are encouraged to attend because they manage a larger portfolio of clinical trials.

The Medical Center's prices for clinical procedures in clinical trials increased on July 1, 2007. For the new price list, please visit the DOM Research Administration website under CRC Resources or contact Nina Feero.

Joseph will be out of the office from Thursday, July 26 through Wednesday, August 8. During this time, please allow at least two days for any "rush" reviews, as reviews cannot be completed in a single day.

Last fiscal year, the Controller's Office mandated that all clinical trial residuals be consolidated into a single clinical trial account for each PI, or into a designated division account if there are not many clinical trials occurring in that division. To do so, identify an expired, unrestricted fund in the 4, 6, or 7 series. Contact Linda Midgett in Accounting to change the fund title to an appropriate descriptive title (for example, "Dr X.'s Clinical Trial Fund Residuals"). Residuals from a closed clinical trial can be consolidated to the fund via the financial journal. Be sure that no new expenditures will hit the fund after you've closed it.

### **BREAD – Biostatistics, Research Ethics, and Design (presented by Mary Banach)**

The BREAD program is funded by the NIH and administered by the UCSF Clinical and Translational Science Institute (CTSI). It was set up to offer expert consulting services to help PIs and RSAs formulate clinical and translational projects.

UCSF's BREAD is the first program of its kind to go live. It is currently funded by an NIH award, but the program needs to be self-sufficient, which is why the current recharge process for BREAD services is necessary. The initial consultation, which lasts up to an hour, is complimentary; after this point, the recharge rate for BREAD services is \$150 per hour.

Consultation is only available for clinically related projects, but can be utilized for projects with any type of sponsor; services are not limited to NIH grants.

Consultation services are broken up into four specialized units – the Biostatistics unit, Research Ethics unit, Research Design unit, and Data Management unit.

- 1) The Biostatistics unit focuses on study design, data analysis, and preparation of manuscripts and presentations.
- 2) The Research Ethics unit provides consultation on complex ethical issues and helps formulate responses to reviewers and CHR.
- 3) The Research Design unit offers consulting services for designing and implementing clinical or translational research; additionally, they offer grant review and scientific review to prepare for CHR applications.
- 4) The Data Management unit assists in the initial choice of a database platform for studies, as well as designing, developing, and maintaining these databases throughout the study.

In addition to the services focused within these units, BREAD offers the following: grant review, scientific review of CHR applications, and consulting on multi-center trials and T1 translational studies.

BREAD services are designed to be easily accessible and comprehensive. To access BREAD services, go to <http://ctsi.ucsf.edu/BREAD/request>, and complete their registration form. You will be contacted shortly by a BREAD administrator or faculty member to set up an appointment.

The BREAD team encourages PIs and RSAs to make contact with them early on in the process of formulating their project—even partially formed questions can help the team make progress in assisting you.

### **EMF Team 1: Reynaldo Del Rosario, Ed Day, and Kevin Wong (Introduced by Arsenio Roldan)**

Arsenio Roldan, the EMF Service Manager, introduced new team-leader Reynaldo Del Rosario along with the rest of the recently restructured Team 1. Team 1 is DOM's go-to for any EMF-related issues.

#### *Award Closeout Timeline*

Highlights from EMF's Close-out Timeline for cost-reimbursable awards follow; a full description of the timeline is attached:

#### **60-days prior to the end of an award:**

EMF sends closeout notification letter to the Department. At this point, the Department is responsible for reviewing and confirming all charges on the account(s), stopping the speedchart number, submitting cost transfers, etc.

#### **Once the award has ended:**

EMF confirms that all items are in compliance. Eighty days after the award has ended,

EMF drafts and sends the final FSR memo to RSAs for concurrence; this occurs 10 days prior to EMF's deadline to submit the final FSR. EMF expects RSAs to respond to this memo within five days of receipt.

For EMF to close the award in the system, the Department must have completed **all** of the required steps. Always be extremely aware and conscientious of the timeline—taking a proactive approach to deadlines will lead to fewer overdrafts and problems.

Since subcontracts and multi-center awards work on a post-award end-date timeline of 60 days, Arsenio is working on a timeline specifically for these types of awards and will disseminate the updated procedure once it has been formulated.

### *General*

Any questions for EMF should be directed to Reynaldo. As the team leader, he will forward the query to the appropriate Team 1 member to get you an answer as quickly as possible.

If a member of Team 1 will be out of the office for an extended period of time, they will send a notification to the RSAs, giving them the opportunity to determine who they need to follow-up with on pending items.

The final five days of every month tend to be extremely busy for the EMF service teams. If you have an urgent item for them during this period, be sure to mark it urgent. EMF will do the best they can to accommodate these items.

To encumber pending PETs to FSRs, EMF needs a copy of the approved PET if it has not been keyed yet. If a PET is being held up due to erroneous issues during the cost transfer review process, please notify Team 1 so that they can assist with any related issues.

Although it would be helpful for EMF to recalculate the F&A rate prior to the closeout process to avoid potential overdrafts, they currently do not have the ability to do so. If you are concerned that a particular account may go into overdraft as a result, send Reynaldo an email requesting that EMF investigate the F&A rate prior to the award closing.

If you find any discrepancies between information in RAS and Weblinks, please notify Team 1.

Stop Codes are being systematically placed on old, closed award accounts. Once a stop-code has been installed, no more changes can be made to the account. Any expenses that hit an account with a stop code will roll over into a Department expense account fund.

If you receive a notification from EMF for an account that does not belong to you, please make sure that the RSA contact information is updated in RAS. If it already is updated, or if the problem continues, contact Reynaldo.

*There is no meeting in August. The next RSA meeting is scheduled for Thursday, September 20, 2007 from 8:30-10:00 AM in room LHTS 416.*