HS SPPO Contacts Meeting

July 11, 2017
Agenda

- HS SPPO Updates, with Erika Wilson
- NIH Updates, with Rachel Cook
- OCGA Updates, with Stella Sung
- OPAFS Updates, with Marissa Yessis

- Next Meeting’s Guest Speaker: Brittany Whiting & Export Control
HS SPPO Updates
HS SPPO Updates

• Reminder: Difference between HS SPPO, OCGA, and OPAFS
• HS-IT Shared Service Implementation
• ePD: How to Add Home Department if Leads Unit is Different
• Budgets and Co-Investigators
• Budget Reminders:
  • Co-Investigators
  • GSR Salary vs. Stipend
  • Animal Care Program Per Diem Rate Changes
• FY 2016 Audit Findings & the Subrecipient Commitment Form
• Future Meeting Topics
• HS SPPO On-Base Form Introduction, with Isabella Bryant-Parkinson
Reminder:
Difference between HS SPPO, OCGA, and OPAFS

- **Post-award accounting and fiscal/financial reporting**
  - Work with SPO office & Departments
    - Location of the Fiscal/Financial Officer

- **OPAFS**
  - NIH, AHRQ, & flow-through grant applications (pre-award only)
  - Review and submit all Just-in-Time (JIT) materials
  - PI Exceptions for ALL Agencies
  - Fellowships & MOST Faculty Scholarships/Career Development
    + Negotiate and accept awards
    + Fund # set-up
    + Post-award communication
  - LRP Applications

- **HS SPPO**
  - All other agency grant & all contract applications (pre- and post-award)
  - Facilitate service agreements and other unfunded agreements
    - Negotiate and accept awards
      - Fund # set-up
      - Post-award communication

- **OCGA**

Dept Business Office

UC San Diego Health
HS-TSC (HSIT Shared Services Recharge) Implementation July 2017

Erika Wilson

Sr. Director Health Sciences Sponsored Projects Pre Award Office (HS SPPO) & Research Service Core (RSC)
HSIT- SHARED SERVICES IMPLEMENTATION

• AGENDA
  • HSIT- RECHARGE OVERVIEW
  • NOTICE OF IMPLEMENTATION
  • PRE-AWARD PROCESS
  • MONTHLY RECHARGE
  • POST-AWARD PROCESS
  • FAQ
HSIT- SHARED SERVICES IMPLEMENTATION

- HSIT Shared Services have been charged to all VCHS Departments since 2016.
  - Last of the shared services to be distributed
  - FY 16 – implemented via a rate per headcount but delayed in implementation (covered centrally as onetime offset)
  - FY 17 – physical charge to departments (covering all missions)
- FY17/18 VCHS Chairs agreed to distribute the cost of services to All Funds (including research)
- All costs have been vetted with UCSD Controller, Budget Office, ITS, FAO, etc. to ensure no duplication with NGN and IDC

- Notice from the VCHS Chairs to All @ UCSD Health was sent on May 9, 2017
This message is sent on behalf of Dr. David Brenner, Vice Chancellor, UC San Diego Health Sciences and Dean of the School of Medicine, to UC San Diego Health Sciences Employees.

The Council of Health Sciences Chairs in April discussed in-depth strategies for managing Information Services (IS) support for grants. After significant discussion, the Chairs expressed agreement that effective with the June 5 NIH submission cycle, all department business officers (DBOs) and grant managers will be instructed to include in new or revised grant application budgets a charge for IS support at the amount of $105 per month per projected FTE. The charge is primarily to offset increasing costs of cybersecurity in the context of unprecedented efforts to compromise our information systems. An FTE is defined as an individual paid by the grant. In cases in which an FTE provides fractional effort to a grant, that fraction should be reflected in the requested IS charge (i.e., for 6 calendar-month effort, $52.50 per month).

Effective July 1, 2017, all grants will be charged for IS support, modeled after the NGN charge process. UC San Diego leadership recognizes that existing grants have set budgets and may or may not be able to accommodate this added charge. Investigators with ongoing awards who believe they cannot accommodate this IS charge should meet with their Department Chair to determine whether some offset can be arranged from departmental resources.

Principal Investigators (PIs) should understand that all grants submitted on June 5, 2017, or after and awarded will not be eligible for subsidy consideration because those grants include the IS charge in the budget. The Office of Sponsored Programs will be instructed to confirm that all new grant applications include this charge prior to uploading the applications.

More information will be made available soon to all PIs regarding use of IS funds in support of their research. Please reach out to your Department Chair if you have any questions.
HSIT- SHARED SERVICES IMPLEMENTATION

• EFFECTIVE JUNE 5, 2017 MUST BE INCLUDED IN ALL HEALTH SCIENCES PROPOSALS
  • ALL HS SPPO & OCGA SUBMISSIONS
  • ALL VA & VMERF PROJECTIONS FOR PERSONNEL AGREEMENTS
  • ALL CLINICAL TRIALS
  • ALL LAB SERVICE AGREEMENTS

THE RATE IS $108 PER PERSON, PER MONTH, TIMES THE % EffORT. WITH ANNUAL ESCALATION OF 3%

ONLY HEALTH SCIENCES EMPLOYEES ARE TO HAVE THE COST PROJECTED. NO CAMPUS OR SIO EMPLOYEES TO BE INCLUDED IN THE COST.
UCSD Health Information Services provides specific Information Technology Services to individuals working on grants. These services include security, desktop support, server support, audio video services, helpdesk, and project management coordination. Charges are based on percent of FTE working on a grant and are charged on a monthly basis.
HSIT- SHARED SERVICES IMPLEMENTATION

HOW DO I ACCESS SERVICES

- https://uchealth.service-now.com/ess_ucsd/it_home.do

Pulse.ucsd.edu is accessible to all “authenticated” users (some departments did restrict their individual sites access controls bit more). If you have a UCSD AD account, you should have access, unless a user going to a specific link that has been locked down.
HSIT- SHARED SERVICES IMPLEMENTATION

WEBSITES-

• http://blink.ucsd.edu/research/preparing-proposals/proposal-development/budgets/direct.html#Other-expenses:-Health-Sciences

• https://healthsciences.ucsd.edu/vchs/research-services/hssppo/Pages/default.aspx

• https://pulse.ucsd.edu/Pages/default.aspx
This charge is for services to ensure a higher level of security protection for Health Sciences personnel, who are integrated in an environment rich with HIPPA data.

Following are guidelines regarding the application of the HS Technology Service Charge to contracts and grants, based on information available to us at this time:

- $108 per month per projected full-time employee (FTE) or fractional proportion based on FTE effort
- Applies to contracts and grants for researchers operating within the Health Sciences domain, and receiving full-service support from UC San Diego Health Information Services.
- Applies to those HS personnel operating at “full-service” locations. “No-Service” locations will not be subject to this charge (Full-Service and No-Services refers to the level of services provided by UC San Diego Health Information Services)
- Applies to contract and grant budgets for all sponsors
- Include on proposal budgets **effective June 5, 2017**
- Applies to contract and grant awards **effective July 1, 2017**
- Will not apply to awards from sponsors that do not allow these types of costs as direct charge without advance notification and approval. If a sponsor does not approve, it will be necessary to allocate this charge to other discretionary funds as approved by the Department Chair.
- Awards where funding is not adequate to cover these charges will be given consideration of a waiver from the Department Chair for these fees, on an award-by-award basis.
- Does not apply to General Campus or Scripps Institution of Oceanography (SIO) researchers. For General Campus or SIO researchers collaborating with Health Sciences researchers on projects, the fee will only be assessed for Health Sciences affiliated personnel and will not be assessed on the salaries of non-Health Sciences personnel.
A line item for this charge should be included in proposal budgets and a detailed explanation should be included in the budget justification. For example:

BUDGET LINE ITEM: HS-TSC (Health Sciences Technology Services Charge) $$$$ 

BUDGET JUSTIFICATION:
UC San Diego Health Information Services costs have been included to reflect costs associated with the increased level of security required for all personnel within UC San Diego Health, which includes UC San Diego School of Medicine, Skaggs School of Pharmacy and Pharmaceutical Sciences, and the hospitals and clinics. These charges are directly attributable and proportionally applied for the individual(s) included in the proposed budget on the project.

TO BE USED IN THE DETAILED BUDGET JUSTIFICATION:
UC San Diego Health Information Services (IS) provides mandatory Information Technology Services to all of Health Sciences faculty and investigators, to include costs associated with the increased level of security required for all personnel within UC San Diego Health, which includes UC San Diego School of Medicine, Skaggs School of Pharmacy and Pharmaceutical Sciences and the hospitals and clinics. To mitigate the specific risk profile of this highly connected environment, UC San Diego Health Information Services ensures that all PIs who IS provides services to, whether they directly access patient information or not, operate in a highly secure desktop, application and server environment with dedicated and highly trained support. Charges are based on percent of FTE working on a grant and are charged on a monthly basis.

These costs are not included in the campus' Facilities & Administration (F&A) rate as an indirect cost. UC San Diego auditors have determined that it is both equitable and consistent with the OMB Circular 2 CFR 200 provisions on cost allocability that the costs be assigned to FTE on grant and contract funds. Accordingly, an allocable portion of these Technology Services costs are included in this proposal as direct project costs.

For questions about the Health Sciences Technology Services Charge please contact Erika Wilson.
HSIT- SHARED SERVICES IMPLEMENTATION

• IMPLEMENTATION HAS BEEN DELAYED TO AUGUST 1, 2017 AND WILL BE RETRO JULY 1, 2017

• This will be implemented as a recharge like NGN based of payroll (similar cost distribution as NGN

• ALL Health Sciences employees regardless of title code will be assessed on the ledgers

• Charge will be based on HOME CODE, LOCATION, PPS DISTRIBUTION (index, percent effort) Both Home Department AND department associated with the appointment MUST be Heath Sciences for this recharge to apply. This will prevent staff in Academic Affairs who are working on a Health Sciences grant to be assessed a charge

• ALL FUND SOURCES WILL BE CHARGED

• HS-TSC account code 634035 has been assigned

• Any HS-TCS charges already on the ledger that are not allowed need to be moved by the department(s) on a financial journal voucher rule class FE53.
HSIT- SHARED SERVICES IMPLEMENTATION

• Who will cover the cost if the funding source cannot support the cost?
• If a sponsor does not allow the additional cost (e.g., AHA, etc.). Who will cover the cost?
• TG and Fellowship institution allowance will not support the additional cost currently required to move NGN and benefits. Who will cover the cost?
• VA/VMRF Who has communicated the additional cost per person per award? Who will cover the cost?

• DEPARTMENT CHAIRS WILL WORK WITH ALL FACULTY REGARDING SUPPORT DURING THE FIRST YEAR OF IMPLEMENTATION ON A CASE BY CASE BASIS.
HSIT- SHARED SERVICES IMPLEMENTATION

- We will continue to provide updates regarding implementation
- Include in ALL proposal submissions
- Start projecting the monthly cost on your June FSR’s
- Communicate with your Faculty, DBO, Supervisor if you have questions, will need to request support from the Chair.
- Please use all reference material from the websites, etc.
QUESTIONS
ePD:
How to Add Home Department if Leads Unit is Different

- When the Lead PI is submitting a proposal through a UCSD Department or ORU that is not the PIs Home Department (primary appointment), approval is required from the Lead Department or ORU as well as from the PIs Home department. In EPD, the Lead Department is determined by the Aggregator (individual creating the proposal record).

Step 1: Add the PI in the Investigators/Key Persons Screen and then click on ‘Details’
How to Add Home Department if Leads Unit is Different

Step 2: Click on ‘Add Unit’ under the Unit Details section to search for the PIs home unit, click on ‘Search’, enter the criteria for your search (i.e. Unit Number or Unit Name), click on ‘Search’
ePD:
How to Add Home Department if Leads Unit is Different

Step 3: Click on the ‘Unit Number’ or ‘Unit Name’ link. Step 4: Click on ‘Save’ and then ‘Return to Investigator’
Budgets and Co-Investigators

• REMINDER- ONLY UCSD EMPLOYEES can be listed by name in a budget for proposal submission.

• ALL others should be listed as TBN for SUB AWARD, CONSULTANT.

• If you have a CO-I that is not a UCSD employee they should be TBN in the budget justification you can list there name and attach the Bio. You DO NOT list them as KEY PERSONNEL.

• https://grants.nih.gov/grants/how-to-apply-application-guide/format-and-write/develop-your-budget.htm
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<th>Type of</th>
<th>GSR Salary</th>
<th>GSR Stipend</th>
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</thead>
<tbody>
<tr>
<td>When Would You Use this Rate?</td>
<td>When listed on a grant as a Graduate Student Researcher.</td>
<td>When listed on an NIH Training Grant (T32 or T35) as a Trainee; or an NIH Individual Fellowship Award (F30 or F31) as a fellow.</td>
</tr>
<tr>
<td>Max Effort Allowed</td>
<td>4.5 Academic Months; 3.0 Summer Months</td>
<td>Flat, monthly stipend rate. % of effort is expected to be the same as GSR Salary.</td>
</tr>
<tr>
<td>Institutional Allowance granted?</td>
<td>No</td>
<td>Yes, $4,200</td>
</tr>
<tr>
<td>Tuition Remission or Tuition &amp; Fees?</td>
<td>Tuition Remission <a href="http://blink.ucsd.edu/sponsor/ocga/index.html">http://blink.ucsd.edu/sponsor/ocga/index.html</a></td>
<td>Tuition &amp; Fees <a href="http://grad.ucsd.edu/financial/graduate-tuition-fees.html">http://grad.ucsd.edu/financial/graduate-tuition-fees.html</a></td>
</tr>
</tbody>
</table>

GSR = Graduate Student Researcher
Budget Reminder: Animal Care Program Per Diem Rate Changes

- Effective September 1, 2017, all submitted animal research proposals must use the new per diem schedule. The new ACP per diem rates for currently funded projects will also be in effect starting September 1, 2017.

- These new rates can be found here: http://go.ucsd.edu/2sUJohc
FY 2016 A-133 Single Audit Findings & The Subrecipient Commitment Form

- Key Findings at our campus that effect the contracts and grants arena include key personnel monitoring and enrollment monitoring,

  - Response to findings are on pages 257-260 of the PDF

- Subrecipient Commitment Form: now mark “YES” that there were findings in our most recent report and in the comment section give the above link to the report + let them know that pages 257-260 are UC’s response to those findings.
Future Topics

What future topics would you like to hear?
HS SPPO
Updated Proposal Review Process

- Streamlining HS SPPO proposal review process
- Departments will now receive an email with link to corrections
  - Standardized notification email
  - Outlines areas of proposals that need corrections
- Benefits
  - Streamlines HS SPPO review process for departments
  - Retrieval form that fund managers can refer to when making corrections
  - Training opportunities for fund managers and departments
- Training
  - Offered at the end of July and early August
  - Leichtag, Room 107
  - Invitations to go out by the end of this week
- Go Live
  - Aug. 2017
NIH Updates
NIH Updates

- Additional Change to NIH/AHRQ/NIOSH Post Submission Materials (NOT-OD-17-066)
- Rev. NRSA Predoctoral Stipends, Training Related Expenses (NOT-OD-17-084)
- Carryover Requests & eRA Commons New Module
- NIH Budget Escalation, Years 2-5
- System Errors with ASSIST Submissions + Last Minute Proposal Submission & FM's need to stay till 5th email received from eRA Commons
- Some ICs definition of Tier 3 Sub may be different from other ICs
- Reminders:
  - New NIH Appendix Policy
  - New Forms E (NOT-OD-17-062) & “Legacy” Adobe Forms Application Packages Phasing 12/31/2017
For grant applications submitted for due dates on or after September 25, 2017, citations of issued patents will be accepted as post-submission materials.

• A citation of a patent must include the names of the inventors, patent title, issued patent number (including country designation, e.g., US for USA), filing date, and the date the patent was issued:

Revised: NRSA Predoctoral Stipends, Training Related Expenses (NOT-OD-17-084)

- These rates are effective October 1, 2016 for Predoctoral Trainees (T32, T35, T90, TL1) and Fellows (F30, F31).

<table>
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<th>Career Level</th>
<th>Years of Experience</th>
<th>Stipend for FY 2017</th>
<th>Monthly Stipend</th>
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<td>Predoctoral</td>
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</table>

- Institutional Allowance: $4,200

*NRSA support is limited to 5 years for predoctoral trainees (6 years for dual-degree training, e.g., MD/PhD, DO/PhD, DDS/PhD, AuD/PhD, DVM/PhD).

** The maximum amount that NIH will award to support the compensation package for a graduate student research assistant remains at the zero level postdoctoral stipend, as described in NOT-OD-02-017.
Select the grant you want to initiate the carryover
NIH Budget Escalation, Years 2-5

- HS SPPO highly suggests that you no longer escalate your budgets in the out years for NIH grant applications.
- The trend we are seeing with NIH is they are no cutting the escalation out of the out years prior to award.
- What can you do? Escalate as much as you can in Year 1, then keep the costs static in the out years.
- What can you still escalate?
  - Post Doc Salaries (justification for annual escalation is the Union Contract), Fringe Benefits (if using the OCGA composite rates), Tuition Remission – escalate what costs can be justified and are not based on a general escalation rate.
System Errors with ASSIST Submissions

- Systems errors have increased, mainly in part to issues with PDF files
  - Electronic Signatures
  - Fillable PDFs vs “Flattened” PDF
  - Page Size: Letter vs. A4
  - PDF Filenames
    - Size and characters
  - Secure files
  - Use of PDF Portfolios

When HS SPPO submits a proposal to NIH, we receive five emails from Grants.gov and eRA Commons. The important ones are the 1st and 5th email. Don't leave till you have the okay from HS SPPO as well as the 5th email.

What about late, as is proposals? Wait…

Email 1: Grants.gov receipt of application (time stamp)

Email 5: eRA Commons successful submission or errors/warnings
Some ICs definition of Tier 3 Sub may be different from other ICs

Past (usual) Definition of Tier 3

- Prime
  - UC San Diego

  - Tier 1
    - MIT

  - Tier 2
    - UAB

  - Tier 3: Crossed out
    - UCLA

NIAID SOP Definition of Tier 3

- Prime/Tier 1
  - UC San Diego

  - Tier 2
    - MIT

  - Tier 3: Crossed out
    - UAB
Reminder:
New NIH Appendix Policy (NOT-OD-17-035)

- Reminder on recent NIH policy for allowable Appendix materials in applications submitted to the NIH, AHRQ, or NIOSH for due dates on or after January 25, 2017.

- **Allowable Appendix Materials**
  - *For applications proposing clinical trials (unless the FOA provides other instructions for these materials):*
    - Clinical trial protocols
    - Investigator's brochure from an Investigational New Drug (IND) application, as appropriate for the goals of the research proposed in the application.
  - *For all applications:*
    - Blank informed consent/assent forms
    - Blank surveys, questionnaires, and/or data collection instruments
    - Other items only if they are specified in the FOA as allowable
Reminder: New Forms E (NOT-OD-17-062)

- Forms E will be required for all due dates on or after January 25, 2018.
- Focus of changes:
  - Consolidation of human subjects, inclusion enrollment, and clinical trial information previously collected across multiple agency forms
  - Expansion and use of discrete form fields for clinical trial information to
    - provide the level of information needed for peer review;
    - lead applicants through clinical trial information collection requirements;
    - present key information to reviewers and agency staff in a consistent format; and
    - align with ClinicalTrials.gov (where possible) and position us for future data exchange with ClinicalTrials.gov
  - Incorporation of recent Grants.gov changes to R&R Budget and SBIR/STTR Information forms
"Legacy" Adobe Forms Application Packages Phasing 12/31/2017

- Grants.Gov is phasing out the downloadable Adobe Form application packages as of December 31, 2017. The following are the two options you have for 99% of the applications you will be submitting to NIH:
  - Option 1: ASSIST
    - ASSIST is eRA Commons home-grown system. HS SPPO works and reviews in this system.
  - Option 2: Workspace
    - *Workspace is Grants.gov own home-grown system. HS SPPO does not work or review in this environment, thus please use ASSIST.*
- Thus on or after January 1, 2018, you must all submit your NIH applications, with HS SPPO, via ASSIST.
OCGA Updates
OCGA Updates

• OCGA Health Sciences Team Recruitment Updates
  o Lisa Gu, Senior Contract and Grant Officer
  o Molly Fashola, Principal Contract and Grant Officer
  o Frank Truong, Principal Contract and Grant Officer

• Material Transfer Agreements (MTAs) as it relates to lab moves.
  o New faculty coming to UCSD and UCSD faculty moving to another institution.
  o OCGA’s MTA team will provide a spreadsheet for the lab to list materials being transferred.
Where to find more information on the OCGA Department Model

Filter for only your department to find out who is on your team

Brief description about who on your team handles what

OCGA Staff Assignments

Find the OCGA contract and grant team for each UC San Diego department/division.

Use the data table below to find the analysts for your department. See additional tips for using data tables. Use the Filter box to search for your department or an analyst by name.

- Officer - Proposals and awards for: Federal Grants and Cooperative Agreements; UC Programs; and General Campus Fellowships.
- Senior Officer - Proposals and awards for: Non-Profit sponsors; DOE Laboratories; and Subaward Grants (all sponsors).
- Principal Officer - Proposals and awards for: Industry sponsors (including PI-Initiated Clinical Trials); State, Local and Foreign Governmental Agencies; Federal Contracts; and Subaward Contracts (all sponsors).

See the Proposal or Award Decision Trees to determine which office handles your Health Sciences proposal or award.
What determines which officer is responsible for my proposal in ePD?

Agency/Sponsor Name and Anticipated Award Type indicated in ePD determines who on your team will be assigned to the record.

If you’re not sure what to select, please call the OCGA Main Line at x 4-3330 or email OCGA general inbox at ocgainfo@ucsd.edu
Where can I find who is handling my proposal in ePD?

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<thead>
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<th>OCGA Analyst</th>
<th>Proposal #</th>
<th>Deadline</th>
<th>PI Name</th>
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OCGA Service Lines and Assignment

If you’re not sure who is assigned to your proposal, please call the OCGA Main Line at x 4-3330 or email OCGA general inbox at ocgainfo@ucsd.edu.
OCGA Department Assignment Model
Recap and Next Steps

• **Sponsor Name** and **Anticipated Award Type** indicated in ePD determines who on your team will be assigned to the record.

• Check the ePD dashboard to see who is assigned to your proposal

• OCGA is working on further guidance/clarification to define the different service lines and award types.

• While the OCGA assignments have changed, the role of OCGA Officers and Fund Managers remain consistent as it relates to proposals and awards.
OCGA Department Assignment Model Recap and Next Steps

• Each department has a team of three OCGA Officers assigned to them with the exception of Department of Medicine.
  o The three OCGA Officers are responsible for different service lines.
  o Contact the OCGA Officer that is assigned to your team for that specific service line. If you’re not sure who that is, please call the OCGA Main Line at x 4-3330 or email OCGA general inbox at ocgainfo@ucsd.edu

• The OCGA Officers assigned to your department are also assigned to other departments.

• Check out the Research Administration Training Program Podcast, Episode 3, which discusses the OCGA Department Model: https://www.youtube.com/watch?v=ELVx3BtP6xI’
OPAFS Updates

- New Associate Director for VCHS: Wella Garcia
- STaRT Tool now on the Cloud
- eFER is now live
  - https://sp_arcm.ucsd.edu/sparcmic/sparc-dept-home.shtml
- Cleaning up old awards:
  - Overdrafts
  - Fixed Price
  - CostSharing
Next Meeting

Export Control, with Brittany Whiting