



**UCLA**

Extramural Fund Management

# EFM Updates

October 9, 2014

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# Agenda

- RAPID Tool Enhancement
- Business Process Changes
- SFN Exception for Training Grant
- Staff Update

# RAPID Tool Enhancement

- Enhancements will be made to RAPID closeout packet to improve efficiency in preparing and reviewing RAPID closeout packets
- New reports to be added to RAPID closeout packet
  - Policy 913 page to provide assurance and explanation
  - Warning and Unallowable report to provide details on a transaction level in addition to the summary level already provided
  - Expense prior to the project start date
- Modification to the existing reports
  - Expenses After the End Date report
    - To exclude transactions with a Document or Earned Date within the period
  - Updated page breaks
- Estimated time of new version release: to be announced
  - EFM is currently working with SOM RAPID Tool team
  - New version will be released in a few waves as certain enhancements are completed

# Business Process Changes

## High Risk Cost Transfer Reviewed by EFM

- Old process
  - EFM Supervisor and designated Accountant III reviewed all high risk cost transfers of the team
- New Process
  - All accountants review high risk cost transfers for the departments they serve except for Accountant I
- Benefit: Better customer service
  - One point of contact for the department
  - Faster turn-around time: 5 business days to 3 business days
- Effective date: to be announced
  - System update in progress

# Single Fund Number Exception – Training Grant

- NIH T32 is exempt from SFN
  - SFN exemption was granted to help reconciliation process for unliquidated obligation to be reported to the sponsor.
  - Department does not need to submit SFN exception request.
- All other training program type awards
  - Automatic SFN exception is not granted.
  - If an award has the same kind of reporting requirements like T32 or any other special circumstance that require MFNOA, department can submit SFN exception request form to OCGA intake team: [awards@research.ucla.edu](mailto:awards@research.ucla.edu)
  - SFN review committee, composed of members from OCGA, ORDM, and EFM will review each request and inform the department of the decision.
- FAQ on SFN can be found on the EFM website
  - <http://ora.research.ucla.edu/EFM/Pages/FAQ.aspx>

# Lourdes Montes – Accountant I



- Accountant 1 in EFM Fund Management team 3 – Effective October 1, 2014.
- Joined EFM in 2008 as Administrative Assistant
- Promoted to Administrative Specialist in Cash Management in 2010
- Experience in cash application, clinical trial appropriation, intercampus payments



# QUESTIONS

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