Version 2

RESEARCH ONBOARDING

Quick start guide for new Faculty research Basic Science, Translational and Clinical

UCSF Department of Orthopaedic Surgery

New Faculty Onboarding Research Cheat Sheet

Welcome!

Welcome to the Department of Orthopaedic Surgery!

The Research team is committed to your success at UCSF. Our team of dedicated researchers are applying innovative new perspectives to fundamental musculoskeletal problems. We strive to better understand fundamental cellular mechanics governing musculoskeletal systems and transform how we provide care to patients.

In 2017, the Department of Orthopaedics Surgery was ranked No. 1 in the nation in National Institutes of Health funding for orthopaedic research, according to data released by the Blue Ridge Institute for Medical Research. The Department of Orthopaedic Surgery received $7,852,165 in peer-reviewed NIH research grants in 2017, surpassing institutions such as Washington University, Duke University and the University of Pennsylvania. At a time when research dollars are becoming increasingly scarce, the Department upped its funding by nearly 40 percent over the previous year. Since 2013, it has consistently ranked among the top five NIH-funded musculoskeletal programs in the country.

This onboarding material will assist new faculty members in understanding the research administration process at UCSF and how to navigate the grant submission process. We also have an internal department website that includes this information in more detail: https://orthosurgeryhelp.ucsf.edu/.

It takes a team to be No. 1 and we're delighted that you're a part of this team.

Feel free to reach out of if you have any questions about the research administration process at UCSF.

Sincerely,

Dr. Jeff Lotz, MD
Professor and Vice Chair of Research
David S. Bradford, MD, Endowed Chair of
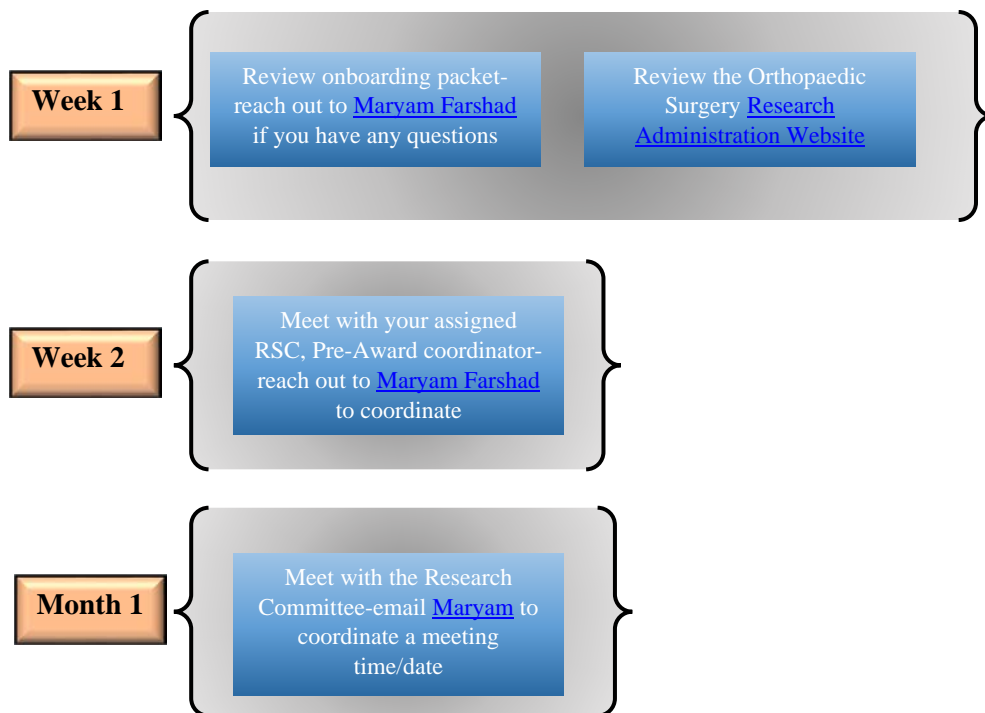Orthpaedic Surgery
Department of Orthopaedic Surgery

Dr. Brian Feeley, MD
Professor in Residence
Chairman, Research Committee
Department of Orthopaedic Surgery

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Next Steps:

- Complete the items indicated on checklist below during your first few months at UCSF

Week 1

Review onboarding packet-reach out to Maryam Farshad if you have any questions

Review the Orthopaedic Surgery Research Administration Website

Week 2

Meet with your assigned RSC, Pre-Award coordinator-reach out to Maryam Farshad to coordinate

Month 1

Meet with the Research Committee-email Maryam to coordinate a meeting time/date

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Orthopaedic Research Administration Contacts

Contacts	Specialty
Jeffrey Lotz, PhD Professor Vice Chair of Research (415) 476-7881 Email: Jeffrey.Lotz@ucsf.edu	Vice Chair of Research Basic science research
Brian Feeley, MD Professor in Residence Chairman Research Committee (415) 353-7586-Primary 415) 353-7566-Secondary Email: Brian.Feeley@ucsf.edu	Chairman of Research Committee Clinical research
Maryam Farshad, MPA Research Administration Manager (415) 502-3345 Email: Maryam.Farshad@ucsf.edu	Research Administration Manager Research Process and Guidance
William Yau Post Award Analyst (415) 476-6708 Email: William.Yau@ucsf.edu	Post Award Analyst Post Award Assistance
Rachelle Palkovsky Clinical Research Coordinator (415) 476-8362 Email: Rachelle.Palkovsky@ucsf.edu	Clinical Research Coordinator, Clinical Trials Assistance
Travis Rimando RMS Office, Pre-Award Assistance (415) 260-8568 Cell Phone (415) 260-8568 Email: Travis.Rimando@ucsf.edu	Research Services Coordinator, Pre-Award Assistance
Dezba Coughlin, PhD Director of Operations-Industry Research Center (415) 476-3114 Email: Dezba.Coughlin@ucsf.edu	Director of Operations, Industry Research Center's

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Common Questions and Answers

1. How do I know what grant to apply for?

Most of the research conducted at universities nationwide is performed with funds from federal or private sponsoring agencies that support research, training and public service through various types of agreements. Faculty submit proposals to sponsors through their institutions to request funding for clearly defined sponsored activities. At UCSF, faculty members work with RMS and GBC to prepare these submissions.

- **Types of proposals** submitted on behalf of faculty in search of sponsored funding.
  - A. *Solicited applications/proposals:*
    - Requests for Applications (RFAs) are stand-alone requests for applications. The RFAs provide sufficient information to allow prospective applicants to determine whether the solicitation is relevant to their funding needs and/or field of research.
    - Occasionally, RFAs limit the number of proposals that an institution may submit. The UCSF Limited Submission Program page has more information.
    - Solicitations or Requests for Proposals (RFPs), are issued by agencies or private funding sources to make requests for a specific project. The RFPs may also be

listed as Program Announcements (PAs). PAs are used to describe new, continuing or expanded program interests of the sponsor or to announce the availability of a new mechanism of support. The resulting agreement usually takes the form of a contract between the funding agency and the institution.

B. *Unsolicited proposals:*
- Unsolicited proposals are submitted to a potential sponsor in accordance with general guidelines and statements of interest rather than as the result of a specific solicitation. For example, most NIH grant support is the result of unsolicited proposals.
- If the sponsor decides to fund the proposed plan of work, the funding may take the form of a grant, contract or cooperative agreement. Most large sponsors have set deadlines for the submission of unsolicited proposals, as well as published schedules for the review and notification process.

o **NIH office for extramural funding resources:**
- The National Institutes of Health (NIH) wizard can help you decide on what grant to apply for
- You can also review the NIH website for a list of popular research grants that includes applying for smaller (RO3, R21) grants versus a larger grants like an RO1.
- RO3 and R21 grants are considered precursor's to a R01 grant.
  - *Common NIH funding mechanisms:*
    - Review NIHs comprehensive list
    - R-series: "Research Programs" - support for individual projects/initiatives
    - K-series: "Research Career Programs" - support for career development programs
    - P-series: "Research Program Projects and Centers" - support for multi-disciplinary programs and centers; usually involve multiple investigators and projects/cores under a single administrative framework
    - T-series: "Training Programs" - support for training programs. For additional UCSF T32 resources go to UCSF Accelerate.
    - U-series: "Cooperative Agreements" - support for multi-project initiatives that, upon funding, involve Federal scientific or programmatic involvement

o **Large multi-investigator grant proposal:**
- For preparing a large, multi-investigator grant proposal. The Large Grant Development Program (LGDP) of the RDO offers a wide range of assistance.

o **RDO resources:**
- The Research Development Office (RDO) also has information on how to plan a proposal: https://osr.ucsf.edu/plan-proposal.
- Review an extensive list for both internal and external funding opportunities.

o **RAP resources:**
- Review RAP Determine Eligibility & Compare Grant chart determine eligibility and to find the grant mechanism that is the best match for you.

o **K Scholar's program**:
- Enroll in the K scholars program. The K Scholars program supports the career development of junior faculty building careers in clinical and translational research. For additional information on annual enrollment as well as funding opportunities view the K scholar's website.

o **Ortho related grants:**

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- E.g., Nova, C-Doctor, refer to Ortho's Research Administration webpage.

2. How do I find research opportunities for funding?

You can find available funding for your research for both internal and extramural grants through the Office of Sponsored Research (OSR). A brief list is also included below.

Intramural Funding Opportunities:

- **RAP:**
    - The Resource Allocation Program (RAP) acts as a one-stop shop for several intramural funding mechanisms by managing the dissemination, submission, review and award for these opportunities. For more information, visit the RAP webpage
    - You can find additional information on available grants including submission rules, eligibility matrix, and tips on how to submit successfully through RAPs grant page.
- **Other on-Campus Funding Opportunities: PBBR**
    - Program for Breakthrough Biomedical Research (PBBR) seeks basic science ideas that are more ambitious than those that receive funding from NIH and other traditional funding mechanisms. For more information, visit the PBBR webpage.

Extramural Funding Opportunities:

- **NIH:**
    - NIH Office of Extramural Research is the largest funder of biomedical research in the world. The grants and funding page includes extensive information about NIH grants, as well as a place to search NIH funding programs. NIH also has an advanced search page, which offers a wide range of search options for available grants.
    - The webpage also has a section aimed at guiding new investigators on their application. The NIH Pathway to Independence Awards may be particularly useful for a new investigator.
- **NSF:**
    - National Science Foundation (NSF) is an independent federal agency that funds approximately 20 percent of all federally supported basic research conducted at America's colleges and universities. You can search for funding opportunities on the NSF website.
- **DOD:**
    - Department of Defense (DOD) is home to the Congressionally Directed Medical Research Program (CDMRP), which supports biomedical research in specific agency-designated strategic areas. The CDMRP page lists current areas of interest and available funding opportunities.
- **FBO:**
    - Federal Business Opportunities (FBO) offers some research funds or research capabilities through a task contract with the federal government. Opportunities for these contracts can be found on the FBO page.
- **PCORI:**
    - The Patient-Centered Outcomes Research Institute (PCORI) is authorized by Congress to conduct research to provide information about the best available evidence to help patients and their health care providers make more informed decisions.

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- **AHRQ:**
  - [Agency for Health-Care Research and Quality (AHRQ)](#) posts grant announcements supporting research to improve the quality, effectiveness, accessibility, and cost effectiveness of health care.
- **HRSA:**
  - [Health Resources and Services Administration (HRSA)](#) provides grants to organizations to improve and expand health care services for underserved people.
- **Pivot:**
  - [Pivot](#) is one of the most comprehensive searchable funding opportunities databases available, with approximately 40,000 opportunities that are private, federal and international in nature. Pivot allows researchers to search funding opportunities, save results, set automated funding alerts, and identify potential collaborators. Pivot is free to all UCSF faculty, staff and students.
  - The Library offers monthly Pivot trainings for faculty, staff, post-docs and students. For the current schedule, go to the [RDO website.](#)
- **LSOs:**
  - Limited submission opportunities (LSOs) are extramural funding opportunities that either limit the number of applications UCSF may put forward to a given sponsor or require another kind of internal coordination (i.e., to eliminate unnecessary duplication of instrument requests).
  - The [Limited Submission Program (LSP)](#) is responsible for notifying the campus of these opportunities, coordinating the internal review and selection process, and notifying all applicants of outcomes. For more information, please visit the [LSP website](#).
  - Make sure to join the limited submission opportunities (**LSO**) listserv at UCSF. To subscribe to the LSP listserv, please visit *https://listsrv.ucsf.edu/cgi-bin/wa?A0=LIMITED_SUBS* and click "Subscribe." A list of all current and recurring LSOs are maintained [online](#).
- **ICD:**
  - UCSF Industry Contracts Division (ICD) works to develop research opportunity through proof-of-concept and beyond. ICD compiles a range of relevant funding opportunities for researchers, from traditional government sources to non-traditional sources -see more on their [website](#).

Other Online Resources
  - **UCSF Library:**
    - Provides access to a variety of different databases, including those listing private foundation funding categorized by study area. Visit the UCSF Library [online](#) to learn more about this resource.
  - **Other federal and non-federal websites:**
    - [COS/PIVOT,](#) [Grants.gov,](#) and [FedBizOpps](#)

Specialty Societies:
  - **OREF**
    - [Orthopaedic Research and Education Foundation (OREF)](#) provides funding for orthopaedic related research.
  - For a comprehensive list, review OSR's funding detailed [list](#).

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3. How do I apply for orthopaedic center related grants?

Core Center for Musculoskeletal Biology and Medicine (CCMBM):
- o The goal of the CCMBM is to stimulate and support transdisciplinary collaborations to accelerate translational research in the musculoskeletal field. A unique strength is the linkage formed between scientists who study disease biology, researchers who analyze vast archives of clinical data, and clinicians who have active clinical practices. These interactions create significant potential for new research collaborations that lead to clinically significant discoveries. The interdisciplinary networking also enhances research productivity and, at the same time, reinforces a sense of scientific community.
- o Applying for a CCMBM grant opportunity:
  - ▪ *You must be a member to apply for the 3 funding opportunities included below*
    - For additional information about the membership process refer to the following link
  - ▪ 3 Available Funding Opportunities include:
    - **1. Pilot/Feasibility Grant Program**:
      - o Deadline varies (usually twice a year – Sept and March)
        - ▪ Established Investigators - $50,000 directs
        - ▪ Junior Investigators - $40,000 directs
        - ▪ Research topics should be translational in nature and related to musculoskeletal disease. Use of funds are to be utilized in at least one of three CCMBM Research Cores - 1) **Epidemiology, Biostatistics and Study Design**, 2) **Imaging**, and 3) **Skeletal Biology and Biomechanics**.
        - ▪ Consults with the appropriate Core(s) contacts for guidance on the appropriateness of your application idea within the framework of the overall Center, and if you require a quote for Core consultation and/or service.
        - ▪ Applications are to be submitted through the UCSF **Resource Allocation Program (RAP)**.

    - 2. **Tools and Technology Grant Program**:
      - o Deadline varies (usually once a year)
      - o $7,500 directs
        - ▪ The Tools and Technology Grants mechanism is to be used specifically for CCMBM cores services to generate preliminary data, incorporate the use of new technologies into existing, funded projects, or generate data for resubmission of extramural grants.
    - **3. CCMBM Core Service Voucher Program**
      - Deadline varies (usually once a year)
      - $5,000 directs
      - CCMBM Service Vouchers can be used for direct application of the CCMBM Core that best suits your research needs for up to $5,000,

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funding the following:
- Pilot work to generate preliminary data
- Development of a new test or service
- Chemicals and supplies to support a designated project
- Fee-for-service work
- Novel, currently unfunded use of a core for an ongoing project

Center for Disruptive Musculoskeletal Innovations (CDMI)
- Review Funding Opportunity in detail
- No membership requirement
- Deadline varies (usually once a year around April)
- $40,000 (needs to include 10% directs)
- Process: Initially 2-3 sentence regarding proposals around any of the CDMI Industry Advisory Board research roadmap areas - http://www.nsfcdmi.org/roadmap

➢ Contact Dezba Coughlin for additional details in regards to center related grant opportunities

4. **I want to submit for a grant opportunity. Who will my contact be?**

    A. For **federal and nonprofit grants:** RMS Office
- UCSF has a centralized pre-awards unit that manages this process, the Research Management Services (RMS) Office. There are designated Research Services Coordinators (RSC) responsible to assist you from proposal through awarding, including:
  - Compiling and submitting grant proposals, including budget development
  - Accepting and negotiating awards where the prime source of funding is a grant
  - Supporting awards, including outgoing subcontracts and progress reports
  - Communication and collaboration with sponsors and internal administrative services
- You can find the person that is assigned to you here.
- If you are having trouble getting the help that you need please contact the Research Administration Manager for the Department, Maryam Farshad.

    B. For **Government and Business Contracts** (GBC): GBC Office
- Your GBC Specialist is responsible for overseeing contracts with federal, state, municipal or foreign governments from proposal through awarding, as well as consultation on business contracts. These services include:
  - Compiling and submitting contract proposals, including budget development
  - Negotiating and accepting contracts
  - Negotiating and accepting sub-award agreements where the prime source of funding is a contract
  - Negotiating business agreements including:
    - Training Affiliation Agreements (TAA)
    - Clinical Professional Service Agreements (PSA)
    - Non-Clinical Service Agreements
  - Central reporting of research administration data

For more on the services provided by GBC, please visit the GBC Our Offices page or contact your GBC Specialist.

    C. **For Industry Contracts:** ICD Office

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- o Assist in creation and management of innovative alliances with commercial, non-profit, and government funding and regulatory organizations.
- o For more information visit the Industry Contract Division (ICD)

For a detailed breakdown of which unit to contact for the type of proposal you are submitting, please see the Responsibility Matrix Chart which is included in this onboarding packet.

5. **How do I find out the status of my Award?**

- The OSR staff member who assisted with your proposal submission will be able to answer questions about an award that is currently in-process.
- For information on a proposal that was submitted but not yet funded, please check with your RSC.
- For proposals submitted through the Industry Contracts Division (ICD), please contact your ICD professional.

6. **I received a notice of award, now what? Who do I go to for post award assistance?**

- Ideally, the sponsor will send a letter to the Pre-Award team who will set up a new account (also referred to as chart strings) for your grant.
- Once that is processed, your Post Award Analyst, William Yau will provide you with an account number in order to start spending on your grant.
- If you receive the letter from the funding agency directly, please inform William Yau so he can inform the pre-award team.
- For advice on budgeting and projected spending, please contact your Post Award Analyst William Yau. He is responsible for creating a budget, providing scenarios and answering questions on your awards.

7. **I would like to work on an Industry Trial or a Clinical Trial, how can I do that?**

- UCSF has centralized the Industry Trials effort. You can find the person that is assigned to you here.
- The OSR office also has detailed information about NIH clinical trials, best practices and resources, refer to their webpage.
- If you are having trouble getting the help that you need please contact Rachelle Palkovsky.

8. **How do I set up a Clinical Trial?**

- The ICD office will work with you and the industry sponsor to negotiate the contracts and budgets for all clinical research studies funded by a *private, for-profit* entity.
- For clinical trials funded by *nonprofit or governmental entities*, please contact your RSC.
- To set up an *industry-funded* clinical trial, visit ICD.
- The Office of Clinical Research (OCR) also provides guidance and support on relevant resources, tools and collaborators at UCSF. Refer to their homepage for additional information.

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9. My study involves human subjects, how do I get approval for this?

- At UCSF the Human Research Protection Program (HRPP) reviews and monitors research involving human subjects at UCSF and several affiliate institutions to ensure the ethical and equitable treatment of the research subjects. Read more about the HRPP program.
  - *The HRPP is comprised of these groups:*
    - The Institutional Review Board (IRB), which reviews human subject research studies — learn how to apply to the IRB,
    - The Quality Improvement Unit (QIU), which conducts monitoring, education and other QI activities, and
    - The Human Gamete, Embryo and Stem Cell Research (GESCR) Committee.
  - *Training required:*
    - All UCSF key personnel conducting human research must complete human subject's protection training through an online program called the Collaborative Institutional Training Initiative (**CITI**).
    - Review the FAQs about CITI Training for registration instructions and training details.
    - **CITI** also offers training on Responsible Conduct of Research (RCR).
    - Additionally, the department has several Clinical Research Coordinators that may help you with your submission. Consult with Rachelle Palkovsky to identify the right person to help you on your submission.

10. My study involves animal subjects, how do I get approval for this?

- The Institutional Animal Care Use Committee (IACUC) oversees all UCSF research and instruction that involves vertebrate animals, in order to ensure that the highest ethical and animal welfare standards are met through all applicable federal, state, and University laws and regulations.
- IACUC approval is required in order to use animal subjects in your study.
- IACUC works closely with the Laboratory Animal Resource Center (LARC) and the Environment, Health and Safety Office (EHS) to safeguard the wellbeing of all animals and researchers here at UCSF.
- Review IACUCs homepage for information on training, policies, guidelines, procedures and approval.

11. How do I make changes or file my IRB or IACUC?

- The OSR staff member who assisted with your proposal submission will be able to answer questions about an award that is currently in-process. For information on a proposal that was submitted but not yet funded, please check with your RSC.
- For proposals submitted through the Industry Contracts Division (ICD), please contact your ICD professional.

Helpful links for research related resources:
   Includes research administrative units at UCSF as well as external websites

   o Research Development Office (RDO)

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- o *Includes funding opportunities, newsletter, joining LSO/funding opportunities listserv, as well as state and federal resources*

- o UCSF Library Proposal Templates and Guides
  - o *Includes RDO grant templates and guides, facilities and resources page, letters of support, resource and data sharing, other proposal sections, instrumentation grants, center grant mechanisms, NIH diversity supplements*

- o Research Allocation Program (RAP)
  - o *Includes RAP portal for grant submissions, submission rules, eligibility matrix, grant mechanisms, and other funding opportunities*

- o Clinical & Translational Science Institute (CTSI)
  - o *Includes funding opportunities, grant writing guidance, guidance on conducting research, training, and programs*

- o UCSF Accelerate Research Resources
  - o *Includes information on training, funding, and conducting research for basic science and clinical research*

- o UCSF Cores
  - o *Allows researchers to easily search UCSF shared instruments and services.*

- o UCSF Clinical Trials
  - o *Allows study participants to search UCSF clinical studies and contact study teams to express interest. The website pulls from clinicaltrials.gov and other data sources and displays the information in a participant-friendly user interface.*

- o Environment, Health and Safety (EH&S)
  - o *Includes guidance and services to the UCSF community on safety and environmental stewardship.*

- o Office of Clinical Research (OCR)
  - o *OCR synergizes clinical trials operations between Campus and UCSF Health, supporting the research needs of clinical trial investigators and staff by providing key study start-up services, including: coverage analysis, OnCore calendar builds, and budget support. OCR also supports clinical research billing, OnCore system and user support, and training for clinical research coordinators.*

- o Research Resource Program (RRP)
  - o *Includes strategic planning and implementation of programs to support core facilities and other research resources.*

- o Office of Ethics & Compliance
  - o *Includes information on research misconduct, conflict of interest, and clinical compliance program.*

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- o Office of Research
    - o *Provides leadership, direction, and management of campus wide research administration, infrastructure and services and oversees the operations of various research units at UCSF*

- o Office of Sponsored Research:
    - o *Allows researchers to build collaborative research teams, pursue funding opportunities, deliver effective proposals, and administer awards.*

- o UCSF Library
    - o *Search for materials including online journals and databases. Find workshops and events, as well as faculty support resources in teaching and research.*

- o NIH Clinical Trials
    - o *ClinicalTrials.gov is a database of privately and publicly funded clinical studies conducted around the world. It's a resource provided by the U.S. National Library of Medicine.*

- o UCSF Clinical Trials Finder
    - o *This site gives you information about the trials going on at UCSF. It also gives you a way to get in touch with the teams running trials that are open to new people.*

- o UCSF Profiles
    - o *Easily find researchers to collaborate with, create a professional online identity and network with over 7000 UCSF faculty and staff.*
- o PREMIER
    - o *Includes detailed information on Core Usage Grants, including details about the application process*

Department websites and resources:

- o Department of orthopedic surgery
    - ▪ *Includes research labs in basic, translational and clinical research, as well as research programs and faculty.*

- o Research administration
    - ▪ *Includes guidance, resources, and information on compliance, clinical research, research opportunities, and grant writing guidance.*

Grant Responsibility Unit Matrix:
- o *Includes breakdown of unit contacts based on type of proposal. See chart below or the following link:*

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RESPONSIBILITY MATRIX				
SPONSOR TYPE (SP Type) If Flow-Through: Use Prime Funding Source	**EXAMPLE**	**AGREEMENT TYPE**	**PURPOSE TYPE**	**Responsible Office**
01 Federal Government		Grant / Fellowship / Cooperative Agreement/ Subcontract to SBIR/STTR	Research / Public Service / Clinical Trial /Instruction / Equipment / Other Sponsored Activity	RMS
01 Federal Government		Contract / IPA / Unfunded Research Collaboration / CRADA	Research / Public Service / Clinical Trial /Instruction / Equipment / Other Sponsored Activity	GBC
02 State Government		Contract / Cooperative Agreement / Grant except CIRM	Research / Public Service / Clinical Trial / Instruction / Equipment / Other Sponsored Activity	GBC
02 State Government		CIRM only: Grant / Contract / Cooperative Agreement / Fellowship - CIRM	Research/ Public Service / Clinical Trial / Instruction / Equipment / Other Sponsored Activity	RMS
03 Other Government Agency	International, World Health Organization (WHO), etc.	Contract / Grant	Research / Public Service / Clinical Trial / Other Sponsored Activity	GBC
03 Other Government Agency	International, World Health Organization (WHO), etc.	Fellowship	Instruction	RMS
04 Business/Profit Entity		Contract / Grant / Fellowship / Unfunded Research Collaboration, MTA, Data Use Agreement	Research / Public Service / Clinical Trial / Other Sponsored Activity	ICD
05 Non-Profit, Business Related	PCORI, International AIDS Society, etc.	Grant / Contract / Cooperative Agreement / Fellowship	Research / Public Service / Clinical Trial / Instruction / Equipment / Other Sponsored Activity	RMS
06 Foundation/Charitable Trust	Bill and Melinda Gates Foundation	Grant / Contract / Cooperative Agreement / Fellowship	Research / Public Service / Clinical Trial / Instruction / Equipment / Other Sponsored Activity	RMS
07 Other Charitable Organization	American Cancer Society	Grant / Contract / Cooperative Agreement / Fellowship	Research / Public Service / Clinical Trial / Instruction / Other Sponsored Activity	RMS
08 Higher Education	Stanford University	Grant / Contract / Cooperative Agreement / Fellowship / Unfunded Research Collaboration	Research / Public Service / Clinical Trial /Instruction / Equipment / Other Sponsored Activity	RMS
13 Major UC DOE Laboratories		Incoming subcontracts only	Research / Public Service / Clinical Trial /Instruction / Equipment / Other Sponsored Activity	RMS
14 UC Campuses and Programs	UC Special Programs	Grant / Cooperative Agreement / Fellowship	Research / Public Service / Clinical Trial /Instruction / Equipment / Other Sponsored Activity	RMS
99 Unassigned		SPONSOR HAS NOT BEEN ASSIGNED A CATEGORY. Please contact Data Managers via OSRDataTeam@ucsf.edu		TBD
N/A All		Contract	Professional Service Agreements - Clinical	GBC
N/A All Sponsor Types (Mainly hospitals and clinics)		Contract	Professional Service Agreements - Inc. Clinical, Clinical Management Services, Medical Director Agreements	GBC
N/A All Sponsor Types (Mainly, schools, hospitals and clinics)		Training Affiliation Agreements	Education Enterprise	GBC
N/A All Sponsor Types		Service Contracts / Memorandum of Understanding	External Recharge, Core Lab Service, Other Sales & Service, Educational Enterprise	GBC
N/A All Sponsor Types		Material Transfer & Data Use	All Purpose Types	*ICD/OTM, send to MTA@ucsf.edu
N/A All Sponsor Types		Business Associate Agreement	Research / Public Service / Clinical Trial / Instruction / Other Sponsored Activity	**Depending on sponsor type
N/A		Confidentiality Disclosure Agreements	Research / Public Service / Clinical Trial / Other Sponsored Activity	***Depending on sponsor type

INSTRUCTIONS TO LOCATE THE SPONSOR TYPE IN CACTAS:
Log in to CACTAS, Go to *Accounts (Sponsor Information)* section and look for SP Type (Sponsor Type).
Look up Sponsor Type on the chart above to identify the office that is responsible for the award.

*If an MTA/DUA is required for a project and is embedded/attached in an agreement, the specialist reviewing that agreement will also review the MTA/DUA.
**Procurement, GBC or ICD responsibility. RSCs will forward to Award Specialists to be routed to Procurement or GBC as appropriate.
***If RMS is responsible, please consult GBC as a resource.

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Orthopaedic Research Administration Contacts

Contacts	Specialty
Jeffrey Lotz, PhD Professor Vice Chair of Research (415) 476-7881 Email: Jeffrey.Lotz@ucsf.edu	Vice Chair of Research Basic science research
Brian Feeley, MD Professor in Residence Chairman Research Committee (415) 353-7586-Primary 415) 353-7566-Secondary Email: Brian.Feeley@ucsf.edu	Chairman of Research Committee Clinical research
Maryam Farshad, MPA Research Administration Manager (415) 502-3345 Email: Maryam.Farshad@ucsf.edu	Research Administration Manager Research Process and Guidance
William Yau Post Award Analyst (415) 476-6708 Email: William.Yau@ucsf.edu	Post Award Analyst Post Award Assistance
Rachelle Palkovsky Clinical Research Coordinator (415) 476-8362 Email: Rachelle.Palkovsky@ucsf.edu	Clinical Research Coordinator, Clinical Trials Assistance
Travis Rimando RMS Office, Pre-Award Assistance (415) 260-8568 Cell Phone (415) 260-8568 Email: Travis.Rimando@ucsf.edu	Research Services Coordinator, Pre-Award Assistance
Dezba Coughlin, PhD Director of Operations-Industry Research Center (415) 476-3114 Email: Dezba.Coughlin@ucsf.edu	Director of Operations, Industry Research Center's