

INTRODUCTION

This Manager's Manual was created as a resource for Social Sciences Managers by Social Sciences Managers. It cannot exist or be most effective without the help of current and future managers, so please feel free to provide your suggestions and revisions as often as possible.

To provide updated information or revisions, please contact the Manager's Manual Creators and Editors:

[Kristina Magpayo Nyden](#)

[Mike Lee](#)

Back Up: Assistant Dean of Social Sciences

Most importantly, the information in this manual was provided by your fellow managers. Many of the templates and examples are offered as reference tools, but please do not circulate these documents without the permission of the original creator. If you are unsure about a document or template, please contact one of the aforementioned Creators/Editors.

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SOCIAL SCIENCES STAFF AND MANAGERS

This section was requested by a fellow manager, who wanted to have a list of the Social Sciences Key Staff and Managers as well as links to their photos (if available). Since we do not see each other frequently, this can help you identify other managers to ask for help.

Unit/Department	Title	Incumbent
Social Sciences Division	Assistant Dean	Caleb "Q" Na
Social Sciences Division	Divisional/Budget Analyst	Jenny Wang
Social Sciences Division	Assistant to the Dean	Amanda McAlpin
Aerospace Studies	MSO	Sylvia Rincon
African American Studies	MSO/SAO	Eboni Shaw
Anthropology	CAO	Monica Diaz
Archaeology (Costen Institute)	CAO	Bronson Tran
Asian American Studies	MSO	Wendy Fujinami
California Center for Population Research (CCPR)	Assistant Director	Lucy Shao
Chicano/a Studies	MSO	Alain de Vera
Communication	MSO	Olga Duka
Center for the Study of Women	MSO	Rosa Chung
Economics	CAO	Nicole Liang
Gender Studies	MSO/Graduate Advisor	Jenna Miller-Von Ah
Geography	MSO	Kasi McMurray
History	CAO	Asiroh Cham
Institute for Research on Labor and Employment (IRLE)	CAO	Nancy Velasquez

Military Science	MSO	Victoria Sanelli
Naval Science	MSO	Brooke Nakagawa
Political Science	CAO	Stephanie Jeffers
Social Sciences Grant Support	Assistant Director	Jenny Huynh
Sociology / Master of Social Science (MASS)	CAO	Christopher Palomo

ORIENTATION

RESOURCES

UCLA Knowledge Base: <https://kb.ucla.edu/> (information submitted by UCLA employees)

Manager's Toolkit from Staff & Faculty Counseling Center:

<https://ucla.app.box.com/v/managers-toolkit-2019>

MAILING LISTS

Administrative

- Facilities Outage Notifications

College & Social Sciences Division

- College MSO/CAO Mailing List: [Contact Assistant Dean of Social Sciences](#)
- [Social Sciences Computing](#)

Contracts and Grants

- Office of Research Administration (ORA): <http://www.research.ucla.edu/ora/>

Financial

- [CASHNet](#)
- [Department of Medicine Fund Manager Training](#) (to join, contact [Raellen Man](#))

Human Resources

- CHR Training News: Send an email to chr-training-news+subscribe@lists.ucla.edu (leave subject line empty; in body of message, write "Subscribe" with no other text included)

Onboarding

- [UCLA Logon](#)

- [Distributed Administrative Computing Security System \(DACSS\)](#)
 - [Department Security Administrator \(DSA\)](#)
 - Submit [Systems Access Request \(SAR\)](#) through [Service Now](#)
 - Contact General Accounting for training

Personnel, HR, and UCPath

- [UC Academic Recruit](#) (Academic Personnel)
- [Postdoctoral Scholars - Graduate Division](#)
- [Central Resource Unit](#)

Travel and Entertainment

- UCLA Travel Alerts:
<https://groups.google.com/a/lists.ucla.edu/forum/#!forum/uclatravelalerts> (This group was created in May 2017 and department leaders were automatically added. For more information on this group, click [here](#))

Student Affairs

- Undergraduate Counselors Mailing List: Contact Corey Hollis of College Academic Counseling
- Association of Graduate Counselors and Advisors (AGCA): www.agca.ucla.edu
- Graduate Division Mailing Lists (Diversity, Inclusion, and Admission; Fellowship and Financial Services; Academic Services): <https://grad.ucla.edu/faculty.html>
 - <https://grad.ucla.edu/resources-faculty-staff/graduate-admissionsstudent-academic-services-list-subscription/>
 - <https://grad.ucla.edu/funding/financial-aid/graduate-financial-services-list-subscription/>

Personal and Professional Development

- Administrative Management Group (AMG): <http://amg.ucla.edu/>
- [Staff Assembly](#)
- [UCLA Recreation FITWELL MoveMail](#)

SYSTEMS ACCESS

Operations/Administration

- [Distributed Administrative Computing Security System \(DACSS\)](#)
 - [Department Security Administrator \(DSA\)](#): Each department must have a DSA pair (primary and back-up). The most common are the MSO/CAO and Fund Manager. Smaller departments may also have the DSA pairs within the unit. Otherwise, the DSA pair may be at the Divisional level or with another department. To grant DSA access to an employee or pair, follow the steps below.
 - Submit [Systems Access Request \(SAR\)](#) through [Service Now](#) and select “DSA Assignments” under “Requested Access.”

- Contact General Accounting for training
- After training, training documents will be sent to you with more information regarding accessing and using the DACSS system. A sample of these documents are found [HERE](#). Note that these documents are as of July 2016 and may be updated periodically.
- Facilities - [Space Inventory](#): Follow instructions in [PDF document](#)
- Equipment Management - Free Furniture List: Email [Mully Hailemariam](#) to join list

College & Social Sciences Division

Contracts and Grants

- [Post-Management Awards System \(PAMS\)](#)
- [Office of Contracts and Grants](#)

Emergency and Safety

- [UCPD Crime and Safety Bulletin](#)

Financial and Purchasing

- [Online Financial Systems Reports](#): The DSA must submit a [Systems Access Request \(SAR\)](#) through [Service Now](#) and select "General QDB" under "Requested Access."
- School of Medicine QDB/FPM (contact IT unit): An alternative financial tool (via an Excel add-on) to access and view the general ledger and payroll reports, which downloads directly to Excel.
- GLASS (contact IT unit): An alternative financial tool to access and view the ledger, contains enhanced search and organizational functions. Must have OASIS login.
- [Post-Authorization Notifications \(PAN\)](#): To receive notifications for transactions, DSA must give you access via DACSS and assign you as a Mandatory or Non-Mandatory Reviewer. PANs must be reviewed and deleted within [two business days](#).
- [CASHNET Access for New/Existing Employees](#)
- [Travel Express Proxy Access](#)
 - To get access to a faculty member outside of your unit, send an e-mail to travelacct@finance.ucla.edu with the name/UID of the staff requestor and faculty member's name/UID.

Onboarding

- [UCLA Logon](#)

Operations

- [Equipment Management Custodian Access Form \(and related Forms\)](#)

Personnel & HR

- [UC Academic Recruit](#) (Academic Personnel)
- [Financial Aid - Work Study](#)
- People Admin - through DACSS
 - Three User Types: 1) Compensation Preparer, 2) Employment Preparer, 3) Hiring Manager/Assistant. If you are missing one, contact College HR or CHR for access.

Student Affairs

- [Fellowship Nomination Systems Access through GoGrad Instructions](#)
- [Jasmine - Graduate Division](#) (process fee remissions, fellowships, etc.)

Personal and Professional Development**UCPath**

- [Main UCPath Webpage](#)
- [UCPath How to Guide](#) (internal resource for Managers)
 - More information on [UCPath Resources](#) as managed by the College
- [Collaboration Tool](#) (dormant resource; no longer active)

TRAININGS

- [UC Learning Center](#)
 - Ensure all staff add you as a manager. For instructions, review steps for [Adding Manager to UC Learning Center](#)
- Time Reporting System (TRS)
 - Departmental Time Administrators (DTA)
 - Every couple of months, TRS Support will hold a one-day training called "DTA Training for the Time Reporting System."
 - After training is completed, submit [DTA Approval Form](#) to gain access to TRS
 - TRS Information:
<https://www.finance.ucla.edu/payroll/time-reporting-system-trs-resources/>
- Contracts & Grants
 - [Office of Contracts and Grants Administration \(OCGA\) Master Training Calendar](#)
 - [Social Sciences Grant Support](#) (for Social Sciences Division)
- Fund Manager

- [Department of Medicine Fund Manager Training](#)
- [Learn IT](#)
 - [Microsoft Imagine IT Academy](#) (IT skills training and certification from Microsoft)
 - [Safari Books Online](#) (on-demand digital library providing over 12,400 technology, digital media, and business books)

FINANCIAL

RESOURCES

- [The Basics on Financials](#): This folder contains two presentations provided by Assistant Dean of Humanities Reem Hanna-Harwell in September 2018 - 1) Basic Accounting and Budgeting and 2) Academic and Staff Payroll Budgeting and Accounting.
- [TIF Mapping](#): Setting up an automatic process to have Technology Infrastructure Fees (TIFs) charge to a specific FAU.

NEW CHART OF ACCOUNTS

- Various UCs have adopted a new chart of accounts, effective February 2021. For information on how this impacts UCLA (particularly the process for intercampus recharges, NPEARs, TOFs, etc.), see the [New Chart of Accounts Memo](#).

STAFFING ROSTER

- Staffing Roster Balancing: Must be done manually by the Social Sciences Dean's Office due to the transition to UCPath.
 - Review the e-mail sent by Assistant Dean Q Na on 1/17/2020: <https://ucla.box.com/s/43yo550lrqu0olw6qcqvayvwm72pm1ql>
 - [Staffing Roster Balancing Form](#)

CONTRACTS AND GRANTS

- [Social Sciences Grant Support](#): SSGS aids faculty in the preparation and submission of grants. Departments/Units without sufficient grant support within the department/unit can have SSGS manage the grants on behalf of the faculty/PI.
- The Basics: For a step-by-step guide on how to handle Contracts and Grants, refer to the documents in [THE BASICS](#) folder. These were provided by Nancy Velasquez, CAO of IRLE, in October 2017.
 - [How to Submit a Proposal to OCGA](#)

- Resources:
 - [Office of Contract and Grant Administration \(OCGA\)](#)
 - [Extramural Proposal Approval and Submission Summary](#) (known as EPASS)
 - [Economic Interests and Financial Disclosure](#) (Form 740, Disclosure Supplement, eEDGE)
 - [Commonly Needed Information](#) (DUNS#, UCLA's Employer Tax ID, FWA, etc.)
 - [Elements of a Budget](#)
 - [Facilities and Administrative Costs](#) (F&A)
 - [Composite Benefit Rate Assessment](#)
 - [Graduate Student Fees and Fee Remissions](#)
 - [Human & Animal Research Subjects](#)
 - [WebIRB](#)

THE LEDGER

- There are different ways to access and view the ledger:
 - Online Financial Systems Report: ofsr.it.ucla.edu (granted by DSA)
 - [Medical School QDB Ledger Tool](#): Installed by your IT unit; downloads directly to Excel and allows for more flexibility with data. Can view ledger and payroll data.
 - [GLASS](#): Installed by your IT unit; PDF data based on cost center, fund, etc.; great for big picture data

CREATING COST CENTERS, FUNDS, RECHARGE ID

- Creating Cost Center: https://request.finance.ucla.edu/?frm_id=AccountCC
 - For more information, review the [Department of Medicine's website](#).
- Creating a Recharge ID:
<https://www.finance.ucla.edu/corporate-accounting/forms/recharge-id-request>

CAO CERTIFICATION/SAS 115

- [CAO Duties and Responsibilities](#)

NPEAR/TOF

- [NPEAR Guide](#)
- [TOF Guide](#)
- These guides are provided by the Department of Medicine (DOM) Fund Manager's Manual. You can find more of DOM's resources on their [website](#).
- [Cross-Functional Control Transfers](#): APB allows TOFs between funds (i.e., 44xxxx and 40xxxx) to be transferred between units without APB approval under \$50,000.

- [Intercampus Transfer of Funds](#): To transfer research funds to a faculty member at another UC. This could also be used in lieu of a one-time intercampus payment.

TRAVEL ACCOUNTING

- [Social Sciences Policy Workshop on Travel Accounting](#): The workshop was organized by Social Sciences Dean's Assistant Amanda McAlpin and led by Mindy Dietrich of Travel Accounting on December 5, 2017. It includes presentation materials on common questions/information, frequent H&I codes, and Express Quick Reference Guide (which can also be found under the Travel Express section).

PURCHASING AND REIMBURSEMENTS

- [UCLA Purchasing & Accounts Payable](#)
- [BruinBuy](#): Access is granted by the DSA after employee takes [BruinBuy training](#). BruinBuy is a multi-faceted tool for various processes, such as placing Purchase Orders/Low-Value Orders through UC vendors, paying guest speaker fees and student awards/cash prizes, and reimbursements for non-travel or entertainment expenses. The P-Card is connected to this system.
- [Express Travel and Entertainment Reimbursement System](#): For reimbursements related to UCLA-related travel or entertainment expenses. The T&E Card is connected to this system.
 - [Express Travel - Quick Reference Guide](#)
 - [Air Carbon Mitigation Fee](#): A 3-year pilot plan implemented in December 2017 to reduce greenhouse gas emissions related to business travel. As of April 2018, the \$9-domestic/\$25-international fee only appears when an airfare reimbursement is processed in Travel Express.
- [Travel and Entertainment \(T&E\) Card](#)
 - Useful for faculty/employees who travel.
 - You can request a one-time exception to waive late fees for a T&E card by contacting UCLA Travel Accounting.
 - T&E Cards can negatively impact the cardholder's credit.
- [Procurement Card \(P-Card\)](#)
 - Useful to purchase items from non-UCLA vendors, such as Amazon. Not to be used for travel or entertainment.
 - P-Cards do not impact the cardholder's credit.

- [iSHIP](#): New application rolled out in September 2017 by Campus Purchasing and Payables, which allows campus users to send letters and small packages via UPS without the need for a BruinBuy PO.
- [Moving Expenses - UC Policy G-13](#): On January 18, 2018, Tax Services sent an e-mail to inform administrators that moving expenses are now taxable.

UC TRAVEL

- [UC Travel Training Presentation](#): Provided by Tanya Lara, former MSO of Naval Science
- [PTA for Direct Billing Airfare](#): PTA is the Pre-Trip Authorization and is required to book airfare if the department is paying for the travel.

FACULTY AND VISITING SCHOLARS PERSONNEL

RESOURCES

- [Academic Personnel Office website](#): Main APO website
- [College Academic Personnel Office website](#): Includes APO resources and notable topics
- [Course Release vs Course Buyout](#) (e-mail sent by Jenny Wang on 8/18/17)
- [Research Fellowships Away from UCLA](#) (e-mail sent by Q Na on 9/15/17)

POSTDOCTORAL SCHOLARS

- [Appointment types and Criteria](#)
- [Guidelines and Forms](#)
- Postdoctoral Scholar Management Guide: Available on Go.Grad

VISITING SCHOLARS

- [UCLA policy regarding Visiting Scholars](#)
- [Dean's Office Dossier Checklist](#)
- Cost of Living Allowance for Visiting Scholars (see [appendix 39](#), V,d,i)
 - Submit [UCLA Graduate Division Fellowship Award Transmittal for Visiting Scholars](#) form
 - [Instructions for Fellowship Award Transmittal](#)
 - These documents are found through [Jasmine](#)

SUMMER SALARY

- [Academic Personnel Summer Salary Policy](#)

- For templates of previous summer salary information from the Social Sciences Divisional Analyst, visit [HERE](#).

FACULTY RECRUITMENT

A. Faculty Relocation

- [Academic Eligibility for Relocation and Recruitment](#)
- [Ladder Faculty Relocation Information](#): Sent by Jenny Wang on October 4, 2017
- [Realtor Contacts for Faculty Searches](#)

STAFF PERSONNEL

RESOURCES

- **College HR - Notable Topics**
 - Every month, College HR sends notable topics to managers. For an inventory of the e-mails, visit [THIS FOLDER](#). Each email will be saved in an Outlook message with the month and highlights of the topic in the subject line.
- **HRAG Meeting Notes**
 - College HR representatives attend Human Resources Administrative Group (HRAG) meetings and send note summaries to managers. For an inventory of these emails, visit [THIS FOLDER](#).
- [Mandatory Employment Notices/Posters](#)
- **AB 168 Salary Information**: Passed in January 1, 2018, this bill prohibits employers from asking job candidates about their previous salary history and from utilizing it in the hiring process. [Click here for UCOP guidelines and suggestions on how best to approach salary discussions without requiring their actual salary data.](#)

RECRUITMENT/HIRING

- [PeopleAdmin - How to Guides](#)
- **New Hiring Documents**
- [New Employee Welcome Kits](#)
- **Making a Job Offer**
 - [Process for Asking College HR for Staff Salary Offers](#) (sent by College Director of Human Resources Fred Owusu on 2/19/2020)

- **Background Checks:** All background checks must be completed prior to the official start date either through [UCPD](#), an off-site location, or through Universal Background Screening. Per Jose Martinez on 7/29/2020, positions that are deemed critical (vast majority of positions) will always require a background check, even if an employee transfers within UCLA with no break in service.
 - For more information and a list of off-site locations, refer to [College HR - Notable Topics \(July 2017\)](#).
 - [Universal Background Screening \(UBS\)](#): For a quicker and more affordable option, UCLA established a contract with UBS. Training and a logon is required; contact College HR representative for more information. Visit the folder of resources for pricing, billing, and policy.
 - [Email sent from College HR on March 9, 2021 regarding criminal background checks and submitting names to College HR via a specific email](#)
- **Preferential Rehire:** When you have an open position and a candidate applies with active preferential rehire, you are required to interview the candidate.
 - [Preferential Rehire Process](#)
 - [Preferential Rehire Form](#)
 - Tips:
 - Check first with the CHR Layoff Coordinator whether you are required to interview the candidate.
 - Treat all candidates the same, asking the same general questions. Utilize the CHR Employment Consultant, College HR, and the CHR Layoff Coordinator for advice.
 - Per policy, the Hiring Manager is required to submit the form directly to the candidate. You may CC the CHR Employment Consultant and Layoff Coordinator. Though there is no hard policy, preferential rehires usually respond in 2-3 days whether they will file a grievance/contest the decision or not, so CHR recommends you wait one full week before moving forward with the process. However, since there is no hard policy, you are authorized to immediately move forward with the hiring/selection.
 - If you decide not to make an offer to the preferential rehire, make sure to take detailed notes during the interview and include relevant information in the form. When completing the form, remain subjective and keep it simple. Choose 2-3 core/required duties for the position and explain why the candidate does not meet those requirements.

APPOINTMENTS

A. Limited Appointments

- For information on Limited Appointments, see [THIS FOLDER](#).

PROBATIONARY PERIOD

- Probationary employees should receive at least one written performance evaluation from their supervisor during the probationary period.
- Performance evaluations may be done when deemed of value, but we recommend discussing performance before the 5th month.
- Probationary release may occur at any time during the probationary period at the University's discretion; the employee must be informed in writing (consult with College HR prior to issuing release letter).
- An employee who has satisfactorily completed the probationary period should be informed in writing.
- Extending the probationary period is possible under certain circumstances, but first consult with College HR first. Note that performance deficiencies rarely, if ever, improve after the probationary period is extended.
- For a sample evaluation form that can be tailored for probationary periods, click [HERE](#).

COMPENSATION PRACTICES

- [College Staff HR Workshop Presentation \(1/12/17\)](#): Presentation by Lauren Na, Michelle Anderson, and John Lee regarding Compensation, Recruitment/Hiring, Retaining/Promoting Staff
- [College Staff HR Workshop Presentation \(8/23/18\)](#): Presentation by Michelle Anderson and Lauren Na regarding Compensation Practices, Reclassification Process, Employee Relations and Disciplinary Actions

TIME REPORTING SYSTEM (TRS)

- [TRS Information on Payroll Website](#)
- Derive Department Code to Create Timesheet: When you hire an employee that reports time via TRS, a timesheet will appear in the system overnight. If the employee's timesheet does not appear, check that the department code appears on the EAPP screen in OASIS. If it doesn't, follow the instructions in [this attachment](#). It takes overnight for the timesheet to appear.

PERFORMANCE EVALUATIONS

- [Campus Human Resources - Performance Management Tools and Resources](#)
- [Conducting a Performance Evaluation](#): Information on *How to Conduct a Performance Evaluation* and Sample Performance Rating Rubrics from a CHR Performance Evaluation Lab Session held during 2016-2017

EARLY INTERVENTION

- [Staff Diversity and Compliance](#): Presentation made in 2016 by John Jividen of the Staff Diversity & Compliance Office regarding Diversity, Inclusion vs Exclusion, Discrimination, Sexual Harassment
- [Insurance & Risk Management](#): Presentation by Dean Malilay and Adrienne Malka on September 22, 2016, regarding insight into cost of litigation, risks and department leadership role, understanding/preventing and mitigating claims, worker's compensation, and disability management

DISCIPLINARY ACTIONS

- [Disciplinary Processes and Resources](#)
- [Navigating Employee Relations Issues at UCLA](#): Presentation by Anthony Solana and Kathleen Shiroma on October 24, 2016, regarding General Guidelines with ER Issues, Role as Supervisor, Managing Difficult Employees, Progressive Discipline

BENEFITS

A. UCRP

- UCRP participation codes are generally system-derived and SHOULD NOT be changed by EDB Preparers. Review e-mail from Maggie He:
<https://ucla.box.com/s/xjyrtczdrzbjvk5fe84kawa6zwncaq>
- [UC Retirement Benefits Choice Program Resource Guide](#) (employees hired on or after July 1, 2016)

B. Vacation Accrual Maximums

- It is the duty of the supervisor to ensure staff stay below the Vacation Accrual Maximum. Refer to the [VACATION ACCRUAL](#) folder for a Memo and Accrual Maximum Exception Form.

FAMILY MEDICAL LEAVE ACT (FMLA)

- [Leave of Absence](#): Step-by-step instructions from UCLA Health Human Resources

PAYROLL AND PERSONNEL SYSTEMS

- [At Your Service Online](#): For all employees to access retirement information, W-2s (previous to UCPath transition in September 2018), and updating beneficiaries. All other related activities will be access through the UCPath Portal.
 - To reset password, visit the [Having Trouble Logging in to AYSO?](#) page.

STUDENT PERSONNEL

ACADEMIC STUDENT EMPLOYEES (TA, Readers)

- [College Academic Student Employee Toolkit](#): contains ASE contact list for the College, the workshop's PowerPoint, sample appointment and notification letters, LOA and Non-Student Tutor Petition forms, and paper exception request forms for those without Jasmine access/Graduate Division PowerPoints for ASE hiring.
- [Top 10 Things to Know about TA Hiring](#): Presentation by Barbara Van Nostrand and Michelle Anderson in January 2017 regarding Best Practices, Appointment Notification, Appointment Security, Eligibility, Workload, Leaves, Substitute Teaching, Benefits, Non Discrimination, and Union
- [Union Membership Election Forms for TAs](#): Update to policy and documents sent in September 2017
- [UAW New ASE Orientation - Summer Session Hires](#): E-mail sent by Graduate Division on 7/2/2019 for first-time ASEs who start in the summer and have not taken the required [ASE Orientation per Article 27 Union Access and Rights section E. Access for Purposes of UAW Orientation](#)

GRADUATE STUDENT RESEARCHERS**HIRING**

- [Academic Apprentice Personnel](#) - Graduate Division
- [GSR Salary Scales](#)
- [Fee Deferrals for ASE and GSR Appointees](#)

CHILDCARE REIMBURSEMENT

- [Childcare Reimbursement](#): This program is for registered UCLA students holding at least a 25% ASE and/or GSR appointment during the academic year and who have (a) qualified dependent(s).
 - Reimbursements processed on 19900 funds will be reimbursed by APB at the end of the fiscal year. **NOTE** that reimbursements are NOT covered by APB during the summer (the hiring unit must cover the cost).

TIME REPORTING SYSTEM (TRS)

- Refer to the STAFF PERSONNEL section

OPERATIONS/OFFICE MANAGEMENT

FACILITIES

A. Main Website: <https://www.facilities.ucla.edu>

- Trouble Desk: (310) 825-9236 (option 1)
- Facilities Service Request (FSR): <http://fsr.admin.ucla.edu/>
- Facilities Outages: <http://outages.admin.ucla.edu/>
- Facilities Management Billing System: <http://botw.admin.ucla.edu/>
- Facilities Pricing List: <https://www.facilities.ucla.edu/request-service/pricing-list>

B. Space Management: <http://space.admin.ucla.edu>

C. Office Refresh Program: Established in February 2018, the program allows economical and swift improvements to your department.

PARKING

- Parking for Faculty/Staff/Students/Guests
 - [Courtesy Parking and Event Parking](#)
 - [Departmental Commuter Coordinators](#) (formerly Parking Coordinators): Must take training through Transportation Services

UCLA DIRECTORY

- [Department Directory Coordinator Website](#) (link updated 2/25/2020)
- To add/delete access, email ucladir@it.ucla.edu

MAIL AND DOCUMENT SERVICES

- Delay Mail (for office closure): Call Fred Eudave at (310) 825-5100
- Mail and Document Services Billing: <http://www.maildoc.ucla.edu/billing/0516.asp>

IT SERVICES (TELEPHONE)

- Wav-mail - receive an e-mail when a voicemail is left on your phone: Start a ticket by e-mailing sdhelp@it.ucla.edu with the phone number and corresponding e-mail address.

IT SERVICES (COMPUTING)

- Bruin Online Software Downloads:
 - [Windows Software](#)
 - [Mac OS Software](#)
 - [Sophos Antivirus Software](#)

- [Google Apps for UCLA](#)
- IT Support from Social Sciences Computing
 - [Web Submission](#)
 - Telephone: 310.206.2821
 - Email: support@ssc.ucla.edu
- [UCLA Box Account](#) - Individuals and Departments can set up UCLA Box accounts (similar to DropBox but more secure and requires BOL logon) to share files. For help or questions, contact Social Sciences Computing.
- e-Preservation (Mike Lee?)

STUDENT AFFAIRS

RESOURCES

- [Best Practices for Graduate Advisors](#) (compiled by Graduate Advisor Jennifer Banawa)

INTERNATIONAL STUDENTS

- [International Student Support Program \(ISSP\)](#): Resources include ISSP Quick Reference Guide for Faculty & Staff, ISSP Staff & Faculty Orientation Slides, ISSP Student Slides. *Download the e-mail message to access attachments.*

COURSE INVENTORY MANAGEMENT SYSTEM (CIMS)

- [Instructions for Undergraduate Courses](#): A compiled guide created by Tanya Lara (Naval Science) in 2017 on steps and information needed on undergraduate offerings in a department – covers a general summary, new course offerings, course revisions and deletions, as well as the routing process.

PROCESSING STUDENT AWARDS

- Prize and award payments are separated into three categories: 1) Employee Prize/Award Payments, 2) Scholarship/Fellowship Awards; 3) Non-Employee Cash Prize/Award. For more information, visit [HERE](#). Payment processing depends on type of category.
- Employee Prize/Award Payments: For both undergraduates and graduates, process through BruinBuy.
- Scholarship/Fellowship Awards:
 - For undergraduates, use the [Financial Aid Transmittal Form](#).
 - For graduates, use the Fellowship Award Transmittal through [Go.Grad](#).

- Accounts: 78xxxx are used for graduate student awards. 77xxxx are used for undergraduate student awards.

SUMMER SESSIONS

RESOURCES

- [Summer Sessions Resources for Staff](#): Includes information on personnel, budget, marketing, etc.
- [Historical Summer Enrollment Dashboard](#): The primary purpose of the dashboard is to track and understand all state-funded, credit-bearing activities during the summer. As such, summer credit-bearing activities that are targeted student success programs and do not generate revenue for academic units are also included. Please keep that in mind when you are reviewing enrollment trends in the context of your summer revenue.
 - For access, complete the following form:
<https://sa.ucla.edu/Forms/public/doHQgpHRLVC-0aBOJr3tl5XVPkKTHWZ5Ums5MiAoBNrbDS3jZlst0gBcP2S--7OV>
 - For questions regarding the dashboard, contact Associate Director of Academic Planning and Analysis (current incumbent: Chris Wiley).
 - For questions regarding summer revenue, contact Summer Sessions CFO (current incumbent: Steve Angelo).

EQUITY & DIVERSITY

RESOURCES

- [UCLA Equity, Diversity, and Inclusion Office](#)
- [Supporting Nursing Mothers at Work](#)
- [All-Gender Restrooms Campus Map](#)

EMERGENCY & SAFETY

BUSINESS AND STAFFING CONTINUITY PLANS

- For your unit's Continuity Plan on file, contact [Tara Brown, Business Continuity Planner, UCLA Insurance and Risk Management](#)
- Place Holder Continuity Plan: <https://ucla.box.com/v/irm-staff-planning-powerpoint>
- Staff Planning for Operational Disruptions (includes information on the UCLA telecommute policy): <https://www.adminvc.ucla.edu/covid-19/staff-planning>

- Template for Staffing List Duties:
<https://ucla.box.com/s/nlq8ne4gcut5lsvjqo6b6cmzq4497331>
 - This is a good way to assess your unit's processes, especially the critical functions along with the approval mapping, to have a plan in place in case someone is unable to work.

TITLE IX

- [Sexual Harassment Prevention](#)
- [Equity, Diversity, and Inclusion](#)
- [Sexual Violence & Sexual Harassment Policy, Resources, and Options at UCLA](#): E-mail sent by Jerry Kang on January 8, 2018 with reporting options, confidential resources for harmed individuals, and resources for accused individuals.

RESOURCES AND TRAINING

Key Offices

- [Office of Emergency Management](#)
- [Facilities Management Emergency Response](#)
- [Environment, Health & Safety](#)
- [UC Police Department Prevention & Education](#)
- [Staff & Faculty Counseling Center \(SFCC\)](#)
- [Office of Ombuds Services](#)

Resources

- [UCLA Bruins Safe Online \(BSO\)](#): For the latest safety news
- [UC Safety Spotlight Newsletter](#)
- [UCPD Annual Security and Fire Safety Report](#)
- [Resources from a Building Coordinators Meeting on June 2, 2016](#): E-mail from Nurit Katz contains plethora of information, including a link to folders with various emergency and safety information (this was given after the June 1st incident).
- [Emergency Preparedness](#): E-mail sent on November 6, 2017, from the Executive Vice Chancellor and Provost Scott Waugh regarding emergency preparation. The information can also be used in syllabi or on websites.
- [Earthquake Preparedness](#): E-mail sent in January 2018 from Nurit Katz on the 24th anniversary of the Northridge earthquake with comprehensive tips on preparing a supply kit, signing up for alerts, getting more involved, and what to do during an earthquake.
- [Assisting Students, Staff, and Faculty in Crisis](#): E-mail sent in February 2018 by Dean of Students Maria Blandizzi regarding the Red Folder (Faculty & Staff 911 Guide), Blue Folder (Employees in Distress), and other resources.

Trainings/Meetings/Workshops

- [College Emergency Response Workshop](#): This was a comprehensive training held on July 28, 2016, for the College of Letters & Science. Presentations include Bullying and Violence in the Workplace, Emergency Action Planning, Injury and Illness Prevention (IIPP) and Ergonomics Seminar, June 1st Shooting Incident After Action. All the slides and notes are found in this folder.
- [College Safety Meeting on February 14, 2018](#): Organized by the Physical Sciences Division with presentations on Wardens, emergency responses/action plans, and injury prevention concepts and ergonomics overview.

BEHAVIORAL INTERVENTION TEAM (BIT)

- [Background on BIT and Online Reporting Form](#) (sent in September 2017)

BEST PRACTICES

A. E-mail Communication (Templates)

- [Template: Earthquake Preparedness, Injury Prevention, Evacuation, and Active Shooter Training](#)
 - This template was provided by Bret Nighman in September 2016. The e-mail is sent on a yearly basis to the entire department as a reminder regarding emergency and safety procedures and resources.

DEVELOPMENT & GIFT FUNDS

RESOURCES

- [UCLA College Development](#)
- [UCLA External Affairs - Development](#)

FUNDRAISING

- [Guidelines for Academic Departments](#): This document was provided by Julie Strumwasser in May 2018 and provides detailed information on Solicitations and Mass Mailings, Gift Processing, Consolidated Gift Fund Management Reports, Gift Acknowledgement, Stewardship, and Relevant Contacts.

GIFT FUNDS

- For Gift Fund Manuals and instructions on how to establish various funds, visit [THIS FOLDER](#).

- Includes *Fundamentals of Gifts at UCLA Participant's Manual (External Affairs)*, *Fundamentals of Gift Administrative Class Guide*, and *Establishing a Regental/Foundation Fund*.
- [Monetary Transfer Form \(MTF\) System](#): Access given by DSA; Must review training materials prior to first transaction; requires two mandatory reviewers. This system gives real time data on gift fund balances and also allows you to transfer funds from The UCLA Foundation to your ledger.
 - To prepare an MTF, visit [HERE](#).
- [Payout Reinvestment Authorization Form](#): To reinvest income back into the principal for an eligible gift fund. The Fund Management office and Foundation Accounting office oversee this process.
- Accounts: 78xxxx are used for graduate student awards. 77xxxx are used for undergraduate student awards.

EVENTS

VENUES

- **UCLA Knowledge Base**: <https://kb.ucla.edu/articles/event-spaces-on-campus>
- [Anderson School of Management Korn Convocation Hall](#)
- [ASUCLA](#) (Ackerman, Kerckhoff): can only use ASUCLA catering (including restaurants located in Ackerman)
- **Broad Auditorium**
 - No fee to use the room (unless there is damage), but must go through UCLA Events
 - Must also submit a [Facilities Services Request \(FSR\)](#) to inquire regarding a room opening fee and Audio Visual Services to inquire regarding AV fees
- [California nanoSystems Institute \(CNSI\)](#)
- **DeCafe in Perloff**: Owned by Architecture and Urban Design; Contact [Linda Holmes](#) (CAO)
- [Faculty Center](#)
 - General Manager: [Luciano Sautto](#)
- [Fowler Auditorium and Courtyard](#)
- **General Academic Classrooms (GAC)**
 - GACs can be reserved for academic purposes (study session, lecture, midterm/final) before 5pm or so through the [Registrar's Scheduling Office](#) and emailing scheduling@registrar.ucla.edu.
 - GACs can be reserved for events after 5pm or so through the [UCLA Events Office](#).
- [Graduate School of Education and Information Studies \(Moore Hall\)](#)
- **Hershey Hall (Room 150)**: Contact LSSAConferenceRoom@lifesci.ucla.edu
- [James Bridges Theater](#)

- [James West Alumni Center \(JWAC\)](#)
- [Kaufman Hall](#)
- **Law School:** Contact [Tal Grietzer](#)
- [Luskin School of Public Affairs](#): charges fee, based on classes, limited availability
- [Meyer and Renee Luskin Conference Center](#): more expensive than other facilities but more amenities
 - Current Contact: [Cindy Gagle](#)
- [Recreation](#) (Pauley Pavilion, Wooden, Student Activity Center, Tennis Center)
- [Royce Humanities Conference Rooms \(Royce 306, 314\)](#): charges fee
- [Social Sciences Computing Instructional Labs](#): Contact labs@ssc.ucla.edu
- [Schoenberg Hall](#)
- [UCLA Catering](#) (on the hill near the undergraduate dorms): Covell Commons, De Neve, Carnesale Commons; can only use UCLA catering
 - UCLA Catering Venue and Accommodations Search Tool:
<http://uclameetings.com>
- [Young Research Library Rooms](#): Free (for now), requires a library sponsor, books only a couple of months in advance

LODGING

- [Claremont Hotel](#): cheaper option for students, accommodations not as nice
- [Hotel Angeleno](#): UCLA vendor near campus, offers free shuttle to guests
- [Meyer and Renee Luskin Conference Center](#)
 - In March 2017, the Social Sciences Division entered a partnership with the Luskin Conference Center and Hotel for reduced rates by using the corporate code **SOSCI**. For more information on the agreement and benefits, click [HERE](#).
 - The original agreement was for \$225/room. As of July 2017, the rate has increased to \$232/room.
- [UCLA Guest House](#)
- [UCLA Tiverton](#)

CATERING

- [ASUCLA Catering](#): less expensive than UCLA Catering
- [UCLA Catering](#): requires minimum to order
- [Outside Vendors](#) (do/don't accept LVO): A list compiled by CSW MSO Kristina Magpayo Nyden. Last updated in 2016. For an updated copy, contact Kristina.

SWAG/OUTREACH MATERIALS

- **SWAG/Outreach Materials**: In order for SWAG to have the UCLA logo (even a UCLA website), it must be purchased from a licensed vendor. Royalty rates will apply. For information on the updated policy circulated in September 2016, visit [HERE](#).

GENERAL RESOURCES

- [CAO/CFO Meeting Recaps](#)
- [Monthly Management Tips](#)

MISCELLANEOUS

MEMORANDUM OF UNDERSTANDING (MOU)

- An MOU is a contract that creates an official agreement between two entities, whether it be within UCLA or with an organization outside of UCLA.
- If an MOU is sought between different UCLA units, it must be signed and agreed upon by both entities.
 - For an example, review an [Internal MOU between a UCLA unit and the UCLA Library](#) (provided by Kristina Magpayo Nyden).
- If an MOU is sought between a UCLA unit and a non-UCLA entity, even if it does not involve funds or services, the signature authority is delegated to the Dean or Vice Provosts.
 - International MOUs, even without financial obligations, must be coordinated through the International Institute (current contact is Kathryn Paul). You should also run this past Lauren Na.
 - For an example, review an [MOU between the University of the Philippines and UCLA](#) (provided by Caleb Q Na).
 - The UCLA Global Partnerships also posts all of their MOUs online on their website: <http://www.global.ucla.edu/partnerships/agreements>.
- Keep in mind that depending on the terms of the MOU, you may need to involve a particular office, such as legal counsel, the intellectual property administrator, real estate office, etc. Kathryn Atchison's office used to coordinate this, but as she is retiring, an updated contact will be provided here as soon as possible.