

## Who Does What - Internal Use Document February 2023

### Academic Affairs Core

#### Business Process Manager - Katherine Jordan

- Provider On-Boarding - welcome e-mail copying Assistant to the Chair. Obtain new faculty personal information, provide licensure and DEA information, background check info
- Closer to start date – send welcome email with badge, parking, concur, and other pertinent information
- Meet with newly hired faculty and/or staff APP to provide a tour of VUMC.
- Maintain department keys for faculty and staff APPs.
- NCO registration, eStar registration, Faculty orientation registration
- Faculty departure checklist
- Submit credentialing requests and reappointments for all clinical providers
- EPacs and effort changes for faculty and staff APPs
- Faculty and staff APP new hire PAFs, job code changes, salary changes, FMLA, parental leave, etc.
- Submit moonlighting additional payments for residents
- Create annual faculty memos via mail merge for cost of living salary increases
- Coordinate provider office set up with CBO
- Assist with moving and setting up desktops for faculty and staff APPs
- Update People Finder
- Synergy/provider on call schedule
- Email patient letters via MHAV for departing clinical providers
- Approve PTA's under 42 days on behalf of Dr. Kelly Brown
- Ensure all HR and insurance documents are saved appropriately to the shared drive
- Maintain faculty outlook groups
- Maintain faculty org charts
- Assist with research faculty NFA submissions
- Submit professional liability applications for newly hired clinical providers
- Obtain background check clearance for all newly hired faculty and staff APPs
- Assistant in the Promotion and Tenure committee – obtain faculty development forms, CVs, create agendas, schedule, and record zoom meetings
- Delegate for the Provider and Facility Directory for all Neurology clinical providers.
  - [PFD Link](#)
  - David Roberts is the contact for training on PFD system
  - The information in the PFD will be what shows up for the providers on vanderbilthealth.com
  - [Neurology Provider Profile Information](#)

#### Lead Administrative Assistant – Chelsea Mundy: Staff Level Support

- Staff On-Boarding – welcome e-mail, badge, keys
- Timekeeping for Department Staff and housestaff
- Staff and housestaff ePacs and effort changes
- Staff and housestaff new hire PAFs, job code changes, salary changes, FMLA, parental leave, etc.
- Maintain staff and housestaff list serves
- Maintain staff org charts
- Update People Finder
- Staff annual performance evaluations

- Staff departure – exit survey, keys, badge, and department electronics if applicable
- Maintain department keys for faculty and staff
- Maintain new hire staff photo board (not required for staff – optional)
- Ensure all HR and insurance documents are saved appropriately to the shared drive

#### **Lead Administrative Assistant – Sandhya Natti**

- Provide tele-program administrative support to the Medical Director, Dr. Adam Hartman
- Maintain tele-neurology RightFax
- Provide administrative support to Drs. Kenneth Gaines, Keerthana Akkineni and Karl Misulis
  - Calendar scheduling
  - Reimbursement via Concur
  - Provider Time Away
  - Clinical activity
  - Incoming patient reports
  - Template/scheduling activity as needed
  - Administrative contact for Crystal Terrace Suite 450
  - Facility contact for repairs/maintenance, i.e., carpet cleaning, keys
  - Supplies and office equipment
  - Mail
- Working to train on financial reporting

#### **Assistant to the Chair – Natalie Rieschick**

- Provide administrative and business support to the Chair or other faculty as requested by the Chair independently
- Perform key administrative functions that support the Chair's leadership in department's patient care, research and educational activities
- Manage multifaceted department logistics and Chair's calendar for meetings and conferences, including travel, room reservations, meeting invitations, on-site catering and off-site dinner meetings
- Prepare reimbursements for Chair's expenses and submit through Concur
- Submit Provider Time Away requests for Chair
- Work closely with Neurology department's CBO and other team members to assure the Chair's preparation for meetings, presentations and other engagements
- Compile and prepare correspondence and other materials for the Chair, including letters of support, letters of recommendation, nomination letters and donor engagement letters
- Provide administrative support for internal and external committees including but not limited to Division Chief meeting, Faculty meeting, Promotions and Tenure meeting
- Gather data and prepare LCME reports and Recognition and Awards Annual report
- Serve as an ambassador to internal and external constituents
- Manage the process and flow of all new faculty appointments, reappointments and promotions
- Organize and manage recruitment visits, including travel arrangements, meetings, interviews, and speaking engagements
- Organize and manage visits for special guest speakers, including travel arrangements, meetings, room reservations, catering and honorarium processing
- Responsible for department Procurement Card (PCard) and Travel and Entertainment Card (T&E Card) which includes payment of invoices, purchases and assistance in setting up travel for recruitment visits and guest speakers

## Education Core

### Program Manager – Laura Hall : Residency

- Day-to-day management of the neurology residency program, including but not limited to coordinating events for the residents
- Manage weekly conferences, graduation, and orientation events
- Recruitment planning
- Act as a liaison for the residents and GME office

### Program Manager - Mary Lamons : Stroke, Movement Disorders, and Sleep Medicine Fellowships, Event Planning, Faculty Recruitment

- Day-to-day management of the neurology fellowship programs:
  - Vascular Neurology
  - Sleep Medicine
  - Movement Disorders
  - Neuroimmunology
- Recruitment planning for faculty
- Manage events for department

### Fellowship Manager – Francesca Rutherford : Epilepsy, Clinical Neurophysiology, Neuromuscular, Cognitive

- Day-to-day management of the neurology fellowship programs
- Manage conferences and other events
- Recruitment planning and fellow onboarding/coordination

## Administrative Core

### Administrative Officer of Operations – Vacant

- Directly supervise 15 administrative staff. Responsible for position classification, interviewing, hiring, staff satisfaction, morale, and discipline of staff
- Sign off on Procurement Lead's P-Card (CBO to sign off on AO P-Card)
- Approve all orders for non-research centers
- Approve add pays monthly for tele-neurology
- Monthly faculty compensation accruals/payouts
- Yearly in June and then every time a new provider starts, review the Professional Liability Insurance certificates. Check center 3-05-400-2000 to ensure we are being charged appropriately for their Ins. Anne Ussery is the contact.
- Management of faculty that work at VA pay and bonuses:
  - Each VA Faculty member has a folder with previous pay stubs and spreadsheets used to calculate their VA/VUMC salary split. Once calculation is complete, send to Mark Dempsey (for comp plan update) and to Katherine Jordan so she can submit update to VUMC system for approval.
- eStar Prorates and items that hit Suspense monthly. VMG Prorates send those emails monthly, AO reviews/Mark Dempsey completes and sends back with any corrections. They also send monthly the eStar Mapping. Shows Revenue center, Bill Area, etc. for each faculty member.
- Review and approve transactions in payroll for clinical and administrative faculty & staff for pay and distribution changes. Process EDC, RDC and ADD PAY transactions for faculty and staff as needed with staff assistance.

- Calculate and submit the Semi-Annual Profit Payouts for faculty with special agreements with Chairman. Prepare backup and Add-Pay and then provide to CBO to review and sign off on.
- Manage PTA & NFA submissions, errors, timeliness
- Fiscal year budgeting
  - Responsible for budgets of all VMG 304,305,307 centers
  - Responsible for ensuring all faculty are included in budget and all staff personnel are loaded into BFT and salaries allocated appropriately
  - Responsible for entering visit volumes in coordination with clinic leadership & Mark Dempsey
  - At beginning of FY, contact fellowship and residency program managers for Clinical Fellow names, dates, PGY level, and who will work at VA. Give all those staff members centers to use for all their expense. Work with Fellowship Directors regarding their Clinical Fellows and their funding sources.
  - Annual review of Peds Epilepsy Fellow costs and reconcile with Peds (our center is 3-07-402-2110)
- Special projects as assigned

#### **Administrative Assistant - Natalie Casselberry : Neuro Cognitive Division**

- Schedule/ manage over provider's Outlook calendars
- Manages VAV STE 2600 conference room calendar
- Manages provider time away (PTA) requests
- Run weekly charge reconciliation reports, and submits eSMART service requests
- Prepares and edits documents such as providers CV's, itineraries, consent forms, and letters of recommendation
- Performs office work including monitoring and answering phone calls, send and receive faxes, and mail distribution/ tracking
- Coordinates with IT (Pegasus) and building management (CRBE) about office and tech issues
- Utilities Concur for coordinating provider's travel plans and submitting reimbursements.
- Assists with faculty recruitment (itineraries)
- Tracking and ordering office and lab supplies on eProcurement for providers and research staff
- Sends out HD related emails for social workers

#### **Administrative Assistant – Courtnie Dunn : General Neurology / Neuroimmunology Division**

- Calendar management for providers
- Schedule meetings and conferences
- Book travel for providers
- Submit receipts in Concur for reimbursement
- Submit PTA's
- Reminder emails for relevant information/monthly meetings/presentations
- Manage communication/meetings between drug reps and providers
- Organize all incoming faxes
- Purchasing needs
- Respond/handle incoming Epic messages
- Assist providers with filling out documents
- Properly label discs for providers
- Organize mail and distribute

### **Lead Administrative Assistant – Rhonda Gourley : Purchasing**

- Copiers
- Facilities Management & Office Repairs
- Purchasing – P-Card, Concur, eProcurement
- Lab Coats
- Order business cards
- Kronos back up
- Professional funds tracking
- Order computers for non-research staff & faculty
- Conference Rooms
- Desk phone requests

### **Program Manager – Megan Mack : Tele-Neurology**

- Support 31 tele-neurologists providing consultations at 12 partner hospitals
- Monthly meetings
  - Take and distribute meeting minutes
- Monthly additional pay report
  - Enter volunteer hours, back-up shifts, and consultations
    - Research epic and/or ViTel Net for verification of new consults
- Monthly back-up shift summary
- Credentialing and Reappointments for Tele-Neurology (31 neurologists) and TeleEEG (3 epileptologists)
- Onboarding new tele-neurologists
  - New applications
  - Kentucky licensure
    - Obtaining licensure
    - Annual license renewals
- FPPE & OPPE for Tele-Neurologists for partner hospitals
  - FPPE – completed after first 6 months
  - OPPE – completed every 6 months

### **Administrative Assistant - Rosemary Madill : Neuro-Oncology, Epilepsy, Stroke, Movement Divisions**

- Serve as resource for providers and at MRBIII labs
- Submit Time Away requests affecting seventeen clinics
- Maintain shared division calendars for Time Away requests
- Serve as mentor and trainer for newly hired Administrative Assistants (AA)
- Submit Time Away requests to VA administration
- Create itineraries and coordinate onsite visits
- Assist with gathering re-credentialing and re-appointment documents
- Assist with CV formatting, prepare bio-sketches and CVs
- Renew and track memberships and licenses
- Coordinate MRBIII building service calls, oversee repairs and facility requests as needed, and issue/track lab keys
- Coordinate equipment removal for MRBIII labs
- Work with MRBIII labs for Fire Marshall Compliance
- Send building outage and general emails to 6th floor staff

- Liaison for campus mail delivery for MRBIII
- Manage access for 6th Neurology staff for MRBIII
- Inventory and order office supplies for MRBIII
- Liaison for Housekeeping for MRBIII
- Proofread references provided by faculty
- Manage physician calendars
- Schedule/coordinate meetings and rooms
- Cater lunches and provide set up for monthly MRBIII Neurology Research Forum
- Assist with speaker arrangements including fliers, catering, securing room, coordination with other departments
- Maintain P-Card documentation
- Place credit card orders for applicable MRBIII labs and providers
- Schedule travel and submit Concur expense reports and travel forms for providers
- Fax and Copier duties, in addition to troubleshooting copier and fax problems
- Serve as liaison between providers and Neurology IT
- Special projects as assigned by leadership

#### Clinical

- Manage Estar message basket
- Complete forms for physician review, as requested by physician
- Draft/proofread patient correspondence for physicians
- Take messages from occasional patient related calls
- Assist in managing templates
- Assist with getting patients scheduled
- Assist with obtaining records not received in time for appointment, as requested by physicians
- Reroute patient records to appropriate clinic
- Trips to linen services for lab coats for physicians
- Send CDs and records to scan
- Assist with out of state medical licenses for providers
- Assist with out of state licensing for telehealth for providers

#### Research

- Order lab supplies and equipment
- Schedule BSC re-certifications
- Ship samples and serve as back-up for lab deliveries
- Coordinate building problems affecting MRBIII labs and P.I.s
- Coordinate major repairs of building equipment with Administration
- Report and request critical services for MRBIII to Neurology Administration for review

#### **Senior Administrative Assistant - Sherrie Maxwell: Stroke Division**

##### Division Chief

- Submit & Maintain Provider Time Away
- Concur for travel reimbursement
- Monitor Calendar

- Check/Print Schedules
- Mailbox
- Coordinate and schedule meetings
- Set up conference calls via VUMC, Zoom & Skype
- Distribute incoming faxes
- Maintain clean linens drop off and pick up
- Progress Note Letters to Referring for all patient appointments

#### O'Duffy

- Submit & Maintain Provider Time Away
- Concur for travel reimbursement
- Progress Note Letters to Referring for all patient appointments
- Check/Print Schedules
- Mailbox
- Distribute incoming faxes
- Maintain clean linens drop off and pick up

#### Froehler

- Submit & Maintain Provider Time Away
- Concur for travel reimbursement
- Coordinate and schedule meetings
- Distribute incoming faxes
- Maintain clean linens drop off and pick up

#### Riebau

- Submit & Maintain Provider Time Away
- Concur for travel reimbursement
- Distribute incoming faxes
- Mailbox

#### Zimmerman

- Submit & Maintain Provider Time Away
- Distribute incoming faxes
- Concur for travel reimbursement
- Concur for expense reimbursement

#### Rouse

- Submit & Maintain Provider Time Away
- Distribute incoming faxes
- Concur for expense reimbursement

#### Hasty

- Submit & Maintain Provider Time Away
- Distribute incoming faxes
- Concur for expense reimbursement

#### Department

- Set-up for Virtual and on-site candidate interviews
- Mail distribution

### **Administrative Assistant - Peggy Pearson : Sleep Division**

- Clinic Coverage Calendar
  - Open Most recent copy of the Clinic Coverage Calendar
  - Review PTA's and NFA's for each provider and fellows
  - Email Dr. Malow and Dr. Shelton (if needed) and ask who is covering PSG
- Make yearly List for Direct referrals, Email Dr. Malow, Dr. Brown, and Dr. Shelton and Dr. Jeradeh Boursouliau to approve list.
  - Make yearly List for Coverage of NP/PA
- Case Conference and Meeting schedule.
  - Check yearly List for Book Chapter, Journal Club, and Case conference and Case review, to see who is doing what.
  - Add an extra going on for the month, like Monthly Sleep Division Meeting, and Quarterly Sleep Conference and any In – Services.
- Call Schedule
  - Make Call Schedule every 3 months
  - Email to providers for input. Once complete, Email call schedule to all necessary contacts.
- Make Yearly clinic schedule for Sleep Provider, APP (NP and PA), Fellows.
- Make yearly list for Book Chapter, Journal Club, and Case conference and Case review, and add Updates throughout the Year.
- Set up before meetings, pick up and put things back after meetings, conferences.
- Put in all PTA's for sleep providers.
- Remind all APP to put in their PTA for Quarterly Sleep CME.
- Send out email with All PTA's that are in for Sleep provider and APPs and fellows and who is covering. Also put this outlook.
- Send out emails about Sleep CME, create Flyers, and setup meeting, with Zoom and all computer access.
- Handle putting in Concur for Sleep Providers.
- Check Providers template out at least 2 months to make sure they are blocked, and patient have been rescheduled on days when providers are out.
- Receive new patient records, scan and put in folder to be uploaded.
- Get Providers Mail and distribute.
- Sort Mail (Maybe about once a month) for department.
- Go to Sleep Division Meeting once a month, take the Minutes.
- Go to Monthly Meeting at OHO.
- Manage 5-6 sleep providers Calendar in Outlook.
- Manage Sleep Conference Room Calendar, for Division.
- Work with Sleep Lab on Accreditation, inputting data and Other things into the system.
- Program and retrieve Actigraphy watches data, schedule pick up time and drop off time and send data to referring provider.
- Work with Program Coordinator to set up different events in clinic.
- Assist Fellows, APP, and Research team, if I am able.

- Cover for fellow co-workers if out.
- IT responsibility includes admin rights to provide Trouble Shooting for Computers, Faxes, and Phones, and programs for those who need it.
- Answer phones, check faxes, scan documents, type documents, make and print Labels, FedEx and mail items.
- Take care of the Monthly PCard items and print paperwork to be signed and turned in and keep a copy for files.
- Order Supplies for office and Providers when needed.
- Set up Meetings for Providers.

#### **Administrative Assistant - Missy Polson : Epilepsy Division**

- Monitor fax machine and get faxes where they need to go
- Manage PTAs
- Manage Outlook calendars for providers
- Liaison between providers and the drug reps
- Take dirty lab coats to linens to be cleaned and pick up clean ones to deliver back to providers
- Deliver imaging discs to the Imaging Library and alert the provider when it has been uploaded to IMPAX and can be viewed
- Label scanning and take to the clinic to be picked up by Iron Mountain
- Answering and researching any Epic messages that come to inbox
- Manage CME codes for Epilepsy conferences every week. There is one on Tuesday and one on Wednesday and one on the 1st, 3rd, and 5th Friday. Ensure the code is available to the Attendings so they can get their CME credits
- Manage the Epilepsy Journal Club every month. This consists of contacting the attending that month and getting the articles they have chosen to present. Send those articles to the Fellows presenting that month so they can choose which article they would like to present. Once they choose, send the articles not chosen back to the attending so they choose which one they would like to present. Once collected everyone's articles, then create the final email invitation and send it out to everyone
- Send out the reminder email for our Epilepsy Division meeting every 2nd Friday of the month. Attend the meeting with the physicians and send out the meeting minutes for Dr. Abou-Khalil once the meeting has concluded
- Schedule the lectures (conferences) for the department and any needed physician meetings
- Sort mail and packages
- Enter receipts into Concur for reimbursement
- Order home video EEGs for the physicians

#### **Administrative Assistant - Dede Settles : Neuromuscular Division**

- Submit and Maintain Provider Time away for Dr's Lee, Peltier, Kerrigan and Hermann, and Holley Cannon.
- Reopening clinics after PTAs' have been changed, coordinating with clinics in three different departments for hybrid clinic appointments.
- Submit and book travel for all providers when needed.
- Submitting expenses into concur for providers
- Monitor calendars for all providers and NP's
- Coordinate VA calendars for Providers who work also at VA
- Coordinate and schedule meetings for all providers.
- Schedule meetings for all Drug Representatives with providers

- Arrange meeting rooms for research opportunities for NM Team.
- Send/mail Biopsy specimens to have analyzed
- Help with credentialing or renewing licenses for providers when needed
- Manage e-star message basket.
- Work with Case manager on scheduling issues
- Send out research medication to patients.
- Send CD's and records/labs to be scanned into EMR
- Schedule Peer to Peer meetings for providers.
- Create and send condolence letters to patients' families.
- Coordinate ALS Clinic lunch and entertainment for monthly clinic.
- On the first Friday of the month serve lunch to all ALS patients and clean kitchen area in the TVC.
- Work with MDA professionals on different events for ALS Clinic
- Create and prepare ALS first time patient folders with forms from MDA and Vanderbilt.
- Create ALS yearly date schedules for monthly clinic days.
- Create and maintain ALS schedule for entertainment and lunch representatives.

#### **Administrative Assistant - AnnaMarie Souvannarath : General Neurology & Stroke Divisions**

- Assist in scheduling meetings
- Travel weekly to pick up scanning, discs and linens and request signature as needed
- Update inpatient responsibilities and vacation to calendar
- Concur - Travel reimbursement
- PTA requests
- Provider Calendar management
- Peer-to-Peer scheduling

#### **Senior Administrative Assistant - Nicole Wampler : Movement Division**

##### Administrative Support for Neurology Department:

- Manage the mail room weekly, on designated day
- Cover for any AA's that ask, while they are out on vacation or sick leave
- Coordinate faculty candidate interviews and onsite visits, including overseeing day-of visit itineraries (primarily for MD candidates, and others when asked)

##### Administrative Support for Movement Disorders Providers:

- Enter PTAs and NFAs for MD providers, including current MD fellow
- Manage Outlook calendars for MD providers
- Facilitate medical and drug representative appointments with division head
- Handle all in basket messages for scheduling that come to me and Dr. Davis
- Take all incoming calls for patients needing to get messages to a nurse or Dr. Davis
- Submit Concur financial reports for travel, license renewals, membership dues, etc.
- Distribute incoming faxes to providers and clinic nurses as well as forward all referrals to our PAC team
- Send referrals for all my doctors referring patients to outside facilities
- Create letters on letterhead for jury duty exemption and letters of medical necessity for various health care needs such as wheelchairs, mobile scooters, handicap tags, etc. – mainly for Dr. Davis
- Zebra label any records that are needed to be put in patient charts and take them to clinic for Iron Mountain scanning
- Obtain any needed provider signatures on various forms
- Fax forms and do any scanning that all my providers need included uploading license and membership renewals to box folders for storage

- Respond to all emails for various things that Dr. Davis needs done – facilitating resident lectures, promotion and tenure meetings, Shade Tree clinic, etc.
- Create redcap surveys for movement disorders research
- Attend weekly division meetings, receiving and providing any administrative updates
- Coordinate CME RSS for MD journal club, including submitting any necessary applications and disclosures
- Provide monthly CME codes for monthly journal club meetings
- Take lab coats to laundry for cleaning and pick up when done
- Take imaging CDs to the imaging library to be uploaded to patient charts
- Book hotels for research patients needing overnight stays
- Send sympathy cards when a patient passes away, including addressing and mailing cards, after gathering providers messages and signatures

#### Administrative Support for DBS Conference:

- Coordinate CME RSS for DBS Conference, including submitting any necessary applications and disclosures
- Provide monthly CME codes for monthly DBS conferences
- Create redcap surveys for DBS Conference needs
- Organize and manage past movement disorders research studies, including transitioning all records to digital database
- Input and update patient data from monthly DBS conferences in online database

#### Neurology Clerkship Coordinator for VU Medical School Students:

- Attend quarterly FCC meetings as neurology clerkship representative and coordinator
- Work alongside neurology faculty to coordinate clerkship student materials and schedules
- Ensure student V-Star pages are kept up to date and contain accurate information & resources
- Attend and proctor medical student exams as neurology clerkship coordinator

#### **Senior Administrative Assistant - Cassandra (Sandy) Watkins : Neuroimmunology Division /Multiple Sclerosis Center**

- Function as Division liaison between MS Center, internal departments and outside vendors including the National Multiple Sclerosis Society.
- Maintain calendar and schedule meetings/classes/seminars for faculty.
- Create schedule for Neuroimmunology Journal Club for Division. CME Associate for Neuroimmunology Journal Club providing evaluations and attendance for lectures. Maintain CME credits for all MS faculty.
- Schedule meeting for MS Center faculty and other staff including research personnel (clinical and bench).
- Maintain mail room.
- Maintain and update faculty and staff calendars.
- Support and train new personnel on policies and procedures of the Division/Department/ University.
- Completion of various forms required in daily operations.
- Order office and laboratory supplies for the MS Center (both Green Hills and VSRH laboratory) through e-procurement. Justify purchases made on procurement card.
- Schedule routine maintenance on laboratory equipment and ensure equipment is certified.
- Monitor laboratory equipment, place work orders for repair on equipment as needed.
- Complete all Pegasus work orders for the Division.
- Compile monthly MS patient statistics for annual report.
- Compose letters for physicians regarding patient diagnosis, disease treatment and prognosis.

- Compose correspondence, help with grant applications and manuscripts. Help in the preparation of grant applications for submission to NIH, NMSS, DOD and other agencies.
- Complete general office duties including filing, answering telephone, photocopying, faxing.
- Retrieve new patient records and information for scheduling of patients. Send new patient faxes to be scheduled to scheduling personnel. Review clinic exam notes and referral letters and send to PCP and/or referring physician as needed.
- Make hotel reservations, airline reservations and registration for faculty attending National and International meetings.
- Complete travel authorization forms for faculty members.
- Complete all Concur reimbursement for all faculty.
- Neurology MS Hospital discharges report review.

## **Financial Core**

### **Senior Financial Analyst – Mark Dempsey**

- Management of monthly invoicing for non-research related Teleneurology contracts
- Provide monthly financial reports to all faculty and leadership as requested
- Obtain faculty salary information from MGMA Academic Practice Compensation & Production Report and from AAMC Report of Medical School Faculty Salaries and update our comp plan with salary data. Chairman uses this information in setting faculty salaries.
- Manage dept. compensation plan
- Set up VMG prorates for incoming providers
- Annual space survey
- Monthly eStar Suspense, Mappings, Prorates, etc.
- CPE reporting quarterly to finance
- CPT usage analysis
- Assist AO with off-comp plan bonus payout data
- Faculty effort distribution audits
- Quarterly recruitment true-ups with finance
- Aeromedical program invoicing
- Supervise AA development with financial reporting
- Fiscal year clinical budgeting

## **Research Core**

### **Administrative Officer of Research – Trish Herring**

- Lead five direct reports
- Prepare monthly financial reports for PI
- Meet with PIs monthly (as requested) to review financial balances & effort
- Review journal entries
- Work with finance to clear deficits on centers
- Monitor effort to ensure it is within salary cap-update if needed
- Submit subcontract invoices for payment & track subcontract payments against agreement
- Review/approve eProcurement orders, ePac submissions
- Review/approve concur reimbursements
- Review/approve software store orders
- Set up centers in iLab and CORES
- Submit computer orders through Pegasus
- Work with finance on financial closeouts

- Monitor VU Endowment spending and restrictions
- Maintain IDS Quarterly report
- Work with HR to create and fill positions & work with VU for postdoc appointments, student workers, research interns
- Manage staff performance & review equity/reclassification requests
- Manage endowments & tracking
- Fiscal year budgeting
- Year-end close
- Lead research coordinator meetings
- Review Aging report for outstanding invoices not received
- Review clinical trial revenue to transfer portion to Neuro central residual center for admin funding
- Update Master Center List (as needed)
- Special projects as assigned

#### **Research Financial Analyst – Nikki Jones**

- Complete PEER application which includes completing eSMART application, creating U# in e-SMART and the PEER #. Uploading the protocol, CTA, and budget in each system, connecting the systems together.
- Working with study teams for other department study costs and study layout.
- Calculate the time/effort for each assessment, prepare the budget, send the counter-offer to the sponsor Negotiations begin
- Negotiate amendments if budget changes
- Review/edit financial language/payment terms in SOW and send back to Sponsor/OCM
- Create billing grids for EPIC charges that occur to ensure charged correctly, and update with amendments
- Create 1275, Center #
- Add the new study to iLab, Cores, Department list, Study Master list
- Update iLABS accounts for roles
- Runs financial reports ([Moving to BA Role once filled](#))

#### **Research Financial Analyst – Vacant**

- Ensure invoicing up to date and reconciled, then will look at adding post award duties
- Reconciliation of clinical trial tracking sheet for coordinator/subject activity
- Verify payments for past work
- Prepare & Submit invoices to CRO/Sponsor
- Follow up with CRO/Sponsors on overdue payments
- Create tracking sheet for new study ([Moving to BA Role once filled](#))
- Update tracking sheets for amendments ([Moving to BA Role once filled](#))

#### **Grants Manager - Samantha Stansel (including Cognitive and C3FIT)**

- Works with PIs and central offices to submit proposals, RPPRs, progress reports, carryforward requests, no cost extension, etc. as required by the awards
- Works with PI to develop budgets for all awards
- Works with PIs and central offices to create and finalize subcontract agreements
- Maintains other support documents
- Creates new grant/contract center numbers
- Process requests for CDA, NDAs, DUAs, and MTAs in PEER

- Point of contact for all C3FIT items

### **Grants Manager - Ashley Phillipps**

- Works with PIs and central offices to submit proposals, RPPRs, progress reports, carryforward requests, no cost extension, etc. as required by the awards
- Works with PI to develop budgets for all awards
- Works with PIs and central offices to create and finalize subcontract agreements
- Maintains other support documents
- Creates new grant/contract center numbers
- Process requests for CDA, NDAs, DUAs, and MTAs in PEER
- Misc. journal entries ([Moving to BA Role once filled](#))
- Enters effort changes into ePac for approval ([Moving to BA Role once filled](#))
- Reviews, signs, and submits all check requests to disbursements for processing ([Moving to BA Role once filled](#))

### **Budget Analyst – Vacant**

- Prepare journal entries for AO signature
- Prepare ePacs for AO approval
- Creates check requests for AO signature
- Creates tracking sheets for new studies
- Potentially assist in creating financial reports