

Budget & Finance Weekly Digest

November 1, 2022 | 95th Edition

Announcements



New Common Chart of Accounts Display Order in UCPATH

Beginning December 12, UCPATH is implementing a New Common Chart of Accounts (CCoA) Display Order. This project will update UCPATH chartfield ordering adhering to the new UC systemwide standard and **will better align** the chartfield order displayed in UCPATH with the segment order seen in Oracle.

Who will be impacted?

- The new CCoA Display Order will only impact UCPATH users.
- **OFC users will not be impacted.** There will be **no change** to data entry in OFC.

Resources

- [New CCoA Display Order Micro Learning Video](#)
- [Current UCPATH Order vs. New UCPATH Order Diagram](#)
- [UCPATH New CCoA Chartfield Definitions Diagram](#)

For a complete description of this project along with the list of **UCPATH pages** impacted by this change, please refer to [UCPATH's New CCoA Display Order Project Space](#).

Advanced Search Office Hours

In case you missed them the first time, on November 7 and November 11, LabViva will be joining [Procure to Pay and Travel & Expense Office Hours](#). They will be available to answer any questions related to the new Advanced Search tool, offering an alternative to the Oracle Procurement search bar. Please take the time to stop by and interface with that team!

Applying DHHS Salary Cap to Non-Federal Grants and Contracts

Sponsored Projects Finance (SPF) has developed an interim solution which will allow the Department of Health and Human Services (DHHS) salary cap to be applied to non-DHHS grants and contracts. Fully automating the salary cap on non-DHHS grants and contracts will take time. Today, if you identify any current or new awards that are funded by a private or state sponsors with a DHHS salary cap mandate:

- Department fund managers may submit a Services and Support ticket to Sponsored Projects Finance (SPF) via [Oracle PPM Sponsored Project Request](#). Please attach back up documentation from the Private or State sponsor mandating the HHS salary cap.
- SPF will review and temporarily modify the award in OFC as a DHHS flowthrough
- It may take up to one week for a new combo code to generate in UCPATH with a 20701 (Private) or 20403 (State) fund- this will apply the HHS salary cap in UCPATH
- To obtain the combo code with the capped fund, Department may go to [BAH](#) > HR/Payroll > Combo Code Report and search using the project code
- Once the combo code with the capped fund is generated, SPF will remove the DHHS entity in the flow through information in OFC
- Department will need to use the new combo code generated for funding entries
- UCPATH Direct Retros may also need to be processed to reflect the new combo code to payroll expenses from previous earning periods

If you have any questions, please submit a ticket to SPF via [Oracle PPM Sponsored Project Request](#) or contact [Wella Garcia](#).

Unallowable Benefits for Post Docs paid on NIH Training/Fellowship Awards

According to NIH, the following postdoc benefits on trainees on Training Grants and Fellowship awards are not allowable:

- Disability Insurance – PSBP
- Life Insurance – PSBP
- State Worker’s Comp Ins

To account for the above as calculated in the Composite Benefit Rates, please use the following rate for Post Docs excluding the unallowable CBR components is:

- FY20: 20.76%
- FY21: 21.38%
- FY22: 20.63%
- FY23: 18.68%

If they were previously charging the full rate, the following percentages need to be deducted to account for unallowable benefits:

- 5.61% for FY20
- 5.47% for FY21
- 5.38% for FY22
- 6.14% for FY23

Department Fund Managers and Sponsored Projects Finance will work together to process a cost transfer to move the unallowable benefits to a general project.

Training & Support



Watch recorded office hours and more on our [UC San Diego Budget & Finance YouTube channel](#).

[Internal Controls Office Hours](#)

Every Wednesday

10:00am - 10:30am

Join the Internal Controls Office Hours to ask questions regarding the internal controls guidance posted on the [Best Practices in Internal Controls Blink page](#).

[Fund Management Office Hours](#)

Every Thursday

11:00am - 12:00pm

At this week's office hours, we will host a Fund Manager Bootcamp Training to walk through the **Non-Sponsored funds** with Kierstin/Xi and Andy. Come and get your questions answered and solidify your knowledge and understanding from a useful and fun information packed session. Don't miss it!

[Reporting Workshop: Dashboard of the Week Series](#)

Monday, November 7, 2022 @ 10:00am - 11:00am

Join us virtually each week as we dedicate time to training on a specific dashboard or report. The workshop format will include an interactive report demo, discussion of what questions the report can answer, opportunities to ask questions and walk through your use cases, and hear how others are using the dashboard or report. Next week's session will feature the **GL-PPM Reconciliation** report.

More information about the series and a full schedule can be found on the [Reporting Workshop Blink page](#).

[Taking Advantage of UC's Car Rental Rates](#)

Wednesday, November 2, 2022

11:00am

This session will go over which car rental companies UC has contracts with, what that means and how to take advantage of them for personal travel. UC's Risk Services will also join us to share information on insurance coverage for business rentals.

[Deconstructing the UC Travel Ecosystem](#) Wednesday, November 9, 2022

11:00am

Need to book travel, want to know which agency has access to all UC rates and benefits, seeking reimbursement, have questions on insurance or per diem – who you gonna call? This will not be a “how to” training, but rather an exploration of the program’s many layers, which can be a great refresher for those coming back to travel or those who are new to travel, but is open to anyone interested.

2022 Year End Review

Wednesday, November 30, 2022 @ 10:00am - 11:00am

There were a lot of enhancements in Travel & Expense and Procure-to-Pay which came out of 2022. Join us in reviewing those enhancements and looking forward to the year 2023 by [registering today!](#)

Travel Perks

Wednesday, November 30, 2022

11:00am

Explore the many benefits provided in UC’s contracts with the major airlines, hotels and car rental companies and learn how to take advantage of them when booking travel.

Travel for Students on Study Abroad Programs

Wednesday, December 7, 2022

11:00am

UC’s contract with Student Universe provides a variety of benefits to our students and we will highlight those along with the exciting Airfare Deposit Program.



Have Finance-related questions?

Call the UC San Diego Finance Help Line.

(8 5 8) 2 4 6 - 4 2 3 7

Tuesdays - Thursdays | 10:00am - 12:00pm & 1:00pm - 3:00pm

Call the UC San Diego Finance Help Line! Knowledgeable agents are standing by to assist you and answer [Finance-related questions](#).

Click to access the [Event Calendar](#) on Blink, which showcases a consolidated view of Office Hours, Instructor-Led Training sessions, and Hot Topics.

Be sure to try out the different calendar views in the upper right corner!

BI & Financial Reporting

Revamped [Get Help Blink Page](#)

We have completely redesigned the BI & Financial Reporting Get Help Blink page to establish consistency and accessibility by streamlining training, resources, learning, and connections with BI & Financial Reporting. Our Get Help page will help you discover all the different resources we have to offer, such as our reporting workshops, data glossary, YouTube channel with recordings of training, and so much more! More specifically, a new page called [Report Index](#) will help you identify which report or dashboard to run based on your use cases and scenarios.

Tips & Tricks

The Support Framework: Your Guide to Finding Help

Learning all there is to know about budget & finance can feel daunting.

Support Framework

Not sure where to find answers? Our support framework is designed to help the Budget & Finance community, including faculty or staff with financial responsibilities, identify resources.

TIER 0 **What Can I Do On My Own?**

Applies to you if you:

- Want to find published support information anytime
- Don't want to wait in line for your question to be answered
- Don't know who your department Subject Matter Experts (SME's) are

Self-Service Resources:

- Your immediate Supervisor
- Budget & Finance User Group
- Knowledge Base Articles
- Community of Practice
- Published Information in Blink
- Training Videos

TIER 1 **Where Can I Get Help?**

Applies to you if you:

- Have a question that is unable to be answered by your department SME or self-service resources
- Have a question that can be quickly answered by a knowledgeable representative
- Need to process a transaction in Services & Support
 - E.g. "I need you to process/approve/route..."

Resources:

- Attend an Office Hours session
- Contact the Finance Help Line
- Submit a request ticket in Services & Support

TIER 2 **Who Can Help Escalate?**

Applies to you if you:

- Are unsure how to submit your request/ticket
- Have submitted a ticket and are not receiving a response
 - Please try to give agents enough time to process your requests before escalating the ticket
- Identify something that does not seem to be working properly

Resources:

- Contact the central support team directly at finance.support@ucsd.edu
- Submit a ticket to Budget & Finance Support
- Find the form in our Request Catalog to process your transaction request

TIER 3 **How Do I Suggest Enhancements?**

Applies to you if you would like to suggest:

- An enhancement to a financial system
- Idea to streamline a financial business process
- Oracle & Concur financial reporting enhancement

Resources:

- Budget & Finance Suggestion Box
- Business Analytics Hub Help Page

[View the full Support Framework on Blink.](#)

UC San Diego
BUSINESS AND FINANCIAL SERVICES

The [Support Framework](#) is designed to help the Budget & Finance community, including faculty or staff with financial responsibilities, identify their resources based on the following questions:

- What can I do **on my own**?
- Where can I **get help**?
- Who can **help escalate**?
- How do I **suggest enhancements**?

[Bookmark](#) or [download a copy](#) for quick links to various resources available to you.

Each Tuesday, the Weekly Digest provides important updates related to Budget & Finance, including Oracle Financials Cloud and Concur Travel & Expense.

Our goal is to deliver timely information that matters to you.

Not sure where to find answers? Get started using our [Support Framework](#).

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