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.



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.

(858) 246-4237 **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!



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.



The Support Framework: Your Guide to Finding Help

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



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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UC San Diego

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