

# Budget & Finance Weekly Digest

June 6, 2023 | 124th Edition

## Announcements



### **New Campus ID Card Request Form**

On **Thursday June 8th, 2023**, Campus Cards will be launching a New ID Card Request Form.

To obtain a new or replacement ID card, employees must submit an [ID Card Request Form](#). The request form will allow employees to pay for their ID card using a chart of accounts or individually fund it via credit card. If the employee chooses to pay for their ID card via chart of accounts, an email will be sent to their financial unit approvers to provide approval to use the COA. Approval must be obtained by the financial unit approver before the request form will be processed and ID card printed by our office. If the financial unit approver rejects the funding request, the employee will receive an email notification. If the employee chooses to individually fund the ID card they will be able to pay using a credit/debit card via our eMarket.

Once the ID card request has been processed by our office and the ID card has been printed, an email notification will be sent to the employee to inform them that they can pick up their ID card during business hours (no appointment needed to pick up the card).

ONLY employees can submit a request form for themselves. If you are an HR representative then you can submit a [Service Ticket](#) to request an ID card for an employee.

For more information please view our [KBAs](#).

### **Oracle Fixed Assets Module Office Hours Monday June 12th**

Next **Monday June 12, 2023**, we will be kicking off the first session of Office Hours. Please join us at **10:05 AM** on [Zoom](#) to learn more about the following topics:

- Purchasing Assets
- Fabrications and Trade-Ins

### Missing a Concur Charge?

In preparation for Fiscal Close be sure all of your expected transactions are showing correctly in your Concur profile. Airfare and local hotels booked in Concur or with Balboa Travel should have a *UCSD CTS Air Hotel Card* payment type indicator. As a reminder, Pending Card Transactions can be deleted. Please verify that all travel purchases made with our central CTS Card are present and accounted for. If you are missing a transaction, please submit a [Services & Support](#) case and attach the airfare receipt/hotel folio so we can research for you.

### Fiscal Year-End Accounts Payable (AP) Accrual Process

Integrated Procure to Pay Solutions (IPPS) posts expense accruals annually during fiscal year-end. The accrual entries are prepared to post in the General Ledger (GL) only with project numbers for outstanding AP expenses of \$2,500 or more that are in Oracle by the ledger cutoff date of July 7. The accrual process will start on July 10 to reflect in the GL on or before July 13. Similarly, Concur expenses will be accrued with specific conditions. If adjustments need to happen after the departmental journal entry cutoff date of July 14, submit them for VC office approval by July 21. For detailed information about the accrual process for Oracle and Concur, visit the [AP Accruals for Fiscal Close](#) page on Blink.

### Updates to Department Reporting Categories

Currently, Department Reporting Categories are optional and available options are: Faculty Controlled and Department Controlled. After discussion with Finance Governance, a name change has been approved. The new options are: **Faculty Portfolio** and **Department Portfolio**. These values will be available starting **June 10**. Existing projects with populated Department Reporting Categories will be automatically updated and no action will be required from departments. Ongoing, departments will be able to update through [PADUA](#).

### Updates to Research Project Classifications

Currently, Clinical Trials are separated between PI and Sponsor Initiated and are marked as such on the Award and with Project Classifications. To reduce this redundancy, BFG has approved eliminating those project classifications. Existing projects will be updated to the class code, Research, on June 10. No action is needed from departments.



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

[Fiscal Close Office Hours](#)

### **Every Wednesday @ 10:00am - 10:30am**

From now until August 2nd, join the Fiscal Close Office Hours to ask questions and provide feedback regarding fiscal close activities.

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### **Mixing Business with Personal Travel**

**Wednesday, June 7 @ 11:00am**

Mixing business with personal can be a sustainable way to travel, so we will share some tips on how to do so without using any UC funds.

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### **ECERT Effort Reporting Office Hours**

**Every Wednesday 2:30pm - 3:30pm**

Come get your questions answered, system access setups, or helpful hints on the effort report certification process.

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### **Fund Management Office Hours**

**Every Thursday @ 11:00am - 12:00pm**

Come get your questions answered and solidify your knowledge and understanding from a useful and fun information packed session. Don't miss it!

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### **Reporting Workshop: Dashboard of the Week Series**

**Monday, June 12 @ 11:00am**

Join us virtually each week as we dedicate time to training on a specific dashboard or report. The workshop format will include discussions and report demos to help address some of your frequently asked questions. There may also be opportunities to win prizes during the series! The next session will feature the **UCPath-PPM-GL Salary Reconciliation and the Default Project Payroll** on How to reconcile payroll between the Labor Ledger and financial ledgers.

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### **Reporting 1:1 Sessions**

[Sign up](#) for a 1:1 Zoom session to meet with a member of the BI & Financial Reporting team who can answer your specific questions about financial reporting and dashboards/panoramas in the Business Analytics Hub (BAH).

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## **Have Finance-related questions?**

## **Call the UC San Diego Finance Help Line.**

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**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](#).

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

# Tips & Tricks

## Concur Browser Reminder

For the best user experience, we recommend using Concur on Google Chrome. If you are using Safari, you'll need to ensure that all cookies are enabled, otherwise you might experience support issues with Concur access and Expense Report Approvals. If you have cookies blocked on Safari, there is a good chance you will experience issues when using Concur.

## 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.

**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) is/are

**Self-Service Resources:**

- Your Immediate Supervisor
- [Budget & Finance Hot Topics](#)
- [Resource by Role/Action](#)
- [Community of Practice](#)
- [Published Information on Blink](#)
- [Training Modules](#)

**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 to 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 request 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](mailto:finance.support@ucsd.edu)
- Submit a ticket to [Budget & Finance Services](#)
- Find the form in our [Support 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
- Create & Concur financial reporting enhancement

**Resources:**

- [Budget & Finance Surveys Box](#)
- [Business Analytics Help Hub Page](#)

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

UC San Diego  
BUDGET AND FINANCE SERVICES

**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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