G: Will receive daily notifications?  A: Yes. Project Managers and PIs will receive a notification when a cost transfer has been completed or their approval is due prior to 10 pm. The notification will provide them with an email notification for an extended period of time.

G: Can I request to turn off daily notifications?  A: Not at this time. Each PIs and Project Managers will receive a notification until the transfer is authorized.

G: What does a notification look like?  A: The notification will include links to the transfer transaction in the accounting system, which will allow the PI and Project Managers to review the transaction and approve it.

G: How can I access the cost transfer system?  A: Oracle and Concur standard reports.ucsd.edu is the platform for accessing the cost transfer reports. Instructions on how to request the appropriate role(s) are available by submitting a ticket to the Oracle and Concur standard or by reaching out to our service desk.

Q: Should cost transfers be supported by other documentation?  A: Yes. Cost transfers involving federal funds, any cost transfer that is not electronically maintained by the department in accordance with local campus requirements, or any cost transfer that is not electronically maintained by the department in accordance with local campus requirements, should be supported by other documentation that fully explains, justifies, and approves the cost transfer.

G: What is the purpose of the catch-up notification?  A: The catch-up notification is a one-time batch notification, after which email notifications will be sent daily when a cost transfer is completed. The catch-up notification is required to meet policy requirements and enhance the cost transfer process, notices, and reports.

Contact: Guest Services & Support

G: Who is the PI? A: The PI is the Principal Investigator. The PI is responsible for overseeing the project and ensuring that all financial activity is properly recorded and monitored. The PI may be a professor, researcher, or other academic administrator.

G: Who is the Project Manager? A: The Project Manager is responsible for managing the day-to-day operations of the project, including overseeing the financial aspects of the project and ensuring that all financial activity is properly recorded and monitored.

G: Where can I view the cost transfer reports? A: You can view the cost transfer reports on the Oracle and Concur standard reports.ucsd.edu platform. Instructions on how to request the appropriate role(s) are available by submitting a ticket to the Oracle and Concur standard or by reaching out to our service desk. Additionally, viewing the reports is available for all other users who are responsible for reviewing and approving cost transfers, but will require the appropriate role(s) to access the reports.

G: What is the university policy on cost transfers? A: The university policy on cost transfers is covered in the UC Grants Policy Manual under section 7.5 (Cost Transfers). The policy outlines the procedures and criteria for making expenditure adjustments. Section 3.B.4 of this policy sets forth limitations on the transfer of costs from one project to another or from one competitive segment to another.

G: When do we receive a notification? A: Email notifications are sent daily when a cost transfer is completed. The catch-up notification is required to meet policy requirements and enhance the cost transfer process, notices, and reports.

G: How do we receive notifications? A: Email notifications are sent daily when a cost transfer is completed. The catch-up notification is required to meet policy requirements and enhance the cost transfer process, notices, and reports.

G: Can we receive a notification for every cost transfer? A: Yes. You will receive an email notification for every cost transfer. The notification will include links to the transfer transaction in the accounting system, which will allow the PI and Project Managers to review the transaction and approve it.

G: How do we approve a cost transfer? A: You will receive an email notification for every cost transfer. The notification will include links to the transfer transaction in the accounting system, which will allow the PI and Project Managers to review the transaction and approve it.

G: What if the notification is not received? A: If you do not receive the notification, please check your spam folder or contact our service desk.

G: How do we ensure compliance with the policy? A: To comply with UC policy requirements for cost transfers involving federal funds, PI’s and Project Managers must be informed of the financial activity, including cost transfers, on their awards. To do this, the university has systems in place to detect such errors within a reasonable time frame; however, recipients are encouraged to evaluate the need for improvements and to make whatever improvements are deemed necessary to prevent recurrence. In addition, recipients are encouraged to evaluate the need for improvements and to make whatever improvements are deemed necessary to prevent recurrence.

G: What are the consequences of non-compliance? A: Recipients who fail to comply with the university policy on cost transfers may face consequences, including the suspension of funding, the requirement to return funds, and sanctions, such as fines or legal action.

G: How do we report errors? A: Recipients are encouraged to report errors immediately to our service desk. In the case of adjustments which involve Federal grants and contracts, the recipient must provide a detailed explanation of the error and submit the necessary documentation. In cases where the recipient fails to report errors, the recipient may be required to return funds and may face consequences, including the suspension of funding, the requirement to return funds, and sanctions, such as fines or legal action.

G: How often do we receive notifications? A: Notifications are sent daily when a cost transfer is completed. The catch-up notification is required to meet policy requirements and enhance the cost transfer process, notices, and reports.

G: Can the notifications be routed to Fund Managers? A: Yes, the notifications can be routed to Fund Managers. As part of an enhancement to the report, the catch-up notification will include links to the transfer transaction in the accounting system, which will allow the PI and Project Managers to review the transaction and approve it.

G: How can we access the cost transfer reports? A: You can access the cost transfer reports on the Oracle and Concur standard reports.ucsd.edu platform. Instructions on how to request the appropriate role(s) are available by submitting a ticket to the Oracle and Concur standard or by reaching out to our service desk.

G: What is the purpose of the catch-up notification? A: The purpose of the catch-up notification is to ensure that cost transfers are completed and approved by the end of each month. The notification will include links to the transfer transaction in the accounting system, which will allow the PI and Project Managers to review the transaction and approve it.

G: Who is the PI? A: The PI is the Principal Investigator. The PI is responsible for overseeing the project and ensuring that all financial activity is properly recorded and monitored. The PI may be a professor, researcher, or other academic administrator.

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