Budget & Finance Weekly Digest

July 26, 2022 | 81st Edition

Announcements

Oracle Scheduled Maintenance

Oracle production environment will be down for maintenance on **Friday, July 29, 2022** from **7:00pm** through **12:00am**.

NIH FFRs Due for July 2022 through Dec 2022 Now Posted

The NIH Reports due for July 2022 are posted in the STaRT Tool. Please prioritize reconciling these awards and work closely with your SPF Award Accountant. Reports due through December 2022 are also posted. You can find the list here.

NIH NRSA Childcare Allowance Guidance

Effective April 2021, NIH provides childcare allowance on its NRSA fellowship and institutional training grant awards of up to $2,500 per fellow/trainee per budget year. Please review the NIH Announcements below:

- Notice for Individual fellows: NOT-OD-21-074
- Notice for institutional training grants: NOT-OD-21-177
- NIH NRSA Childcare Allowance FAQs

UCSD's guidance on eligibility, applicability, how to request allowance and disbursement process has been finalized and published here.

Fiscal Close Bulletin: Feedback Wanted
Yesterday, the final edition of the Fiscal Close Bulletin for FY21-22 was sent out. Read the final edition here!

We welcome you to complete a quick survey on how the Fiscal Close Bulletin went for you. The survey will close on **Friday, August 12**.

Camp IPPS Course Capacity
In response to the overwhelming registration for our Camp IPPS courses, we have increased the capacity for all offered classes. All those who were waitlisted should have been notified. If you did not confirm your waitlisted spot in the allotted 12 hours, you are free to register again in the UC Learning Center. Do not use the link in the waitlist email if you missed the 12 hour window as it will no longer allow you to register. Instead, refer to our original schedule to register for classes today. Remember to register for the Open House event that kicks off our training week for a chance to win a prize!

Closing Purchase Orders
You can now request that any legacy or Oracle PO be closed via Services & Support ticket! If you need to close any POs to lift their commitments, please first confirm all goods and services have been fully paid for on this PO, and no further invoices are expected. Then, you can submit a case via Services & Support (Buying Goods & Services – Oracle Procurement – Revising or Canceling an Order) with a list of POs and a confirmation of the latter statement. All POs submitted before the last week of the month will now be closed and have their commitments lifted in the following month.

Watch recorded office hours and more on our UC San Diego Budget & Finance YouTube channel.

Internal Controls Office Hours

Every Monday @ 11:00am - 12:00pm

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

This week we will have open Q&A. Bring your questions and struggles. Nothing a fund manager does is off the table. Trying to figure out the source of a GL-PPM discrepancy? Can't figure out how to get your direct retro
with cap gap to work? See a wire you need to claim but have no idea what to do next? Bring your issue to office hours and phone a friend.

UC San Diego Travel: Before You Go

Thursday, July 28, 2022

9:00am - 11:00am

Faculty and staff who travel or book business travel can further their understanding of preauthorization, booking travel via Concur, prepaying with the Travel & Entertainment Card, and how to take advantage of TripIt Pro. It is recommended that travelers and preparers also attend the *UC San Diego Travel: Reporting Expenses* course before the trip concludes.

UC San Diego Travel: Reporting Expenses

Thursday, July 28, 2022

1:00pm - 3:00pm

This course provides an overview of UC San Diego travel policy and the trip reconciliation procedure, including summarized guidelines and on-demand resources. Faculty and staff will learn about the Concur processes for claiming travel expenses on a Travel Expense Report.

Oracle: Buying and Paying for PO Requisitioners

Thursday, August 4, 2022

9:00am - 11:00am

This course includes hands-on instruction on the use of Oracle Procurement & Payables. It focuses on topics such as shopping for and purchasing goods and services, searching across UC San Diego requisitions and POs, closing POs, processing nonPO payments, and checking invoice status. This course will be especially valuable for individuals responsible for departmental purchases who want to further their understanding of buying on campus.

Please note the Introduction to Oracle Procurement & Payables eCourse is a required prerequisite for registration.

Camp IPPS

August 15-19, 2022

Camp IPPS is back with 30 instructor-led zoom courses spanning hot topics in Oracle, Concur, Payables, Logistics, and more! Mix and match classes or attend them all in this immersive, camp-themed training week.

Registration Now Open!

The training is "*in-tents*"! Plan ahead.

Register early to add classes and Camp IPPS events to your calendar.

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!

Updated: Sponsored Research Project Closeout Guidance

The sponsored research project closeout guidance has been updated to include new useful reports to help reconcile GL, PPM and other sublegers - refer to the Sponsored Research Closeout Process in OFC PPM.

Querying Open Purchase Orders

If you would like to query which POs are open on a particular project and task, financial unit, or other criteria, you can use the reports available on the Procure to Pay Panorama. Go to bah.ucsd.edu > **Budget & Finance** > **Procure to Pay Panoramas**

> then **Launch** the **UCSD-DSH Procure to Pay Panorama**. In the **PO Balances Report**, you can query for POs with the status **Closed for Receiving** to view all POs which have open commitments.

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 financesupport@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.

Visit Our Website | Subscribe to our YouTube | Contact Us

UC San Diego

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