Guest Traveler Addresses in Concur

In order to protect the Personally Identifiable Information (PII) of our non-employee travelers, Concur will not display the address of anyone marked as a guest traveler in Concur. This is to ensure the privacy and security of our users.

Requisitions and Invoices

When creating requisitions or invoices, it is important to ensure that POETAF information is populated correctly, when applicable. Review our new Financial Unit Approver Guide for Oracle Procurement and the Procure-to-Pay Decision Matrix to guide University faculty and staff in the process of requisitioning and claiming expenses after the business trip occurs.

Travel and Expense Management

UC San Diego Travel: Reporting Expenses

Faculty and staff who travel or book business travel can further their experience by using TripIt, a popular travel app and perk. Not only does TripIt provide the same functionality as Concur Travel, it also automatically syncs travel plans to Concur Travel, ensuring that all current and completed bookings are recorded in a single place.

Program Closeout

The National Institutes of Health (NIH) Notice of Awards includes a term and condition that will state whether the grantee has automatic carryover authority, or if approval is required.

NIH Closeout Policies

More Specifically:

- For awards where carry-over requires prior approval, during annual financial reporting, OPAFS will forward the FER to NIH. OPAFS will request a no-cost extension from NIH if needed. If NIH does not respond within 90 days, OPAFS will assume that NIH will not approve the carry-over. For awards with an end date of 3/31/2021, please prioritize reconciling these awards and submit the Financial Expense Reports early in the month to ensure that NIH receives the FER earlier than 120 days after the period of performance end date.
- In circumstances where OPAFS receives the FER from the department late or with incomplete data, a no-cost extension should be requested with the Office of Contracts and Grants Administration (OCGA).
- In the event that additional time is needed to fulfill the closeout requirements, a request can be made to the NIH. OPAFS will forward the FER to NIH and the Office of Contracts and Grants Administration (OCGA) will be notified. The request will be reviewed and OPAFS will be notified of the outcome.
- NIH will notify OPAFS of the approval, and the payment will be processed.

Additional Information

For more information, please review the following documents:
- UCSD Financial Closeout & Reporting Policies
- UCSD Contract Closeout Policy
- UCSD Accounting Closeout Policy
- UCSD Procurement
- UCSD Travel

Other OPAFS Assessments

For FY21, the following central campus assessments were transacted in the PMS with expenditure reports submitted to NIH.

- STaRT Tool
- OFC : ISIS :
- Ancillary and Self Support
- Cloud and Concur Travel & Expense
- ProSAM Funding Code Map
- Student Payment Support

Graduate Student Stipend & Fee Payments - Retroactive Funding

Changes / Backlog

Many users had issues with the Office of Contracts and Grants Administration (OCGA) during the backlog.