Budget & Finance Weekly Digest

April 27th, 2021 - 17th Edition

Announcements

Reminders of NIH Policies Related to Closeout

The Payment Management System (PMS) where NIH funds are drawn down will automatically reject any request made after 120 days past the period of the performance end date.

- Departments are encouraged to review and prioritize reconciling awards that have ended and use the report that lists all financial reports due that can be found in the SPARCM Dept Portal at https://act.ucsd.edu/sparcm/sparc-dept-home.shtml using the following steps:

1. Click on *Department Dashboard*
2. Select your Department > Click *Select*
3. Show “All” entries
4. Click *Excel*
5. The report can be filtered by column:
    1. Waiting: Department
    2. Filter by Action: Final FER awaiting departmental approval

Per NIH guidance, it is suggested that a No Cost Extension (NCE) be processed in the event that additional time is needed to complete the aims of the project or fulfill the closeout requirements at the end of the project period when funds are remaining.

- Departments are encouraged to work with the Office of Contracts and Grants Administration closely, submitting required documents 30-90 days before the project end date, to ensure that NCEs are obtained in a timely manner

- The first NCE request for an award should include the completed, signed FDP form (https://blink.ucsd.edu/sponsor/ocga/forms.html#Award-Forms), and a copy of the IRB or IACUC approval letter if applicable. If additional extensions are needed, please contact your OCGA Officer for specific instructions.

If a revision on the final Federal Financial Report is necessary:

- The Authorized Organizational Representative must notify the Grants Management Specialist listed in the Notice of Award for additional guidance (see NIHGPS Section 8.4.1.5.3).
- The notification must indicate why the revision is necessary and describe what action is being taken by the recipient to preclude similar situations in the future.

Oracle Inquiry Role Update

As an update to the basic Oracle access granted in recent weeks, we will begin granting additional access through the AR Inquiry and Reporting role. This will affect the same population of users and provide more visibility in Oracle and broader access for reporting.

With the expanded privileges, please remember that UC San Diego is committed to maintaining and protecting privacy for individuals and the confidentiality of institutional information. This requires the handling of information to ensure that it will not be disclosed in ways that are inconsistent with authorized use and its original purpose.

Click to view all known transitional issues impacting financial processes and reports. This list was curated specifically to support financial review and corrective actions by department fund managers.

Training & Support

Fund Management Post-Training Survey

We encourage you to answer this short survey to help us determine the usefulness of the content, level of satisfaction, and future topics. Remember, you can watch the Fund Management training series here, including recorded office hours.

New BI Author Course in UC Learning!

Take a deeper dive into Oracle Transactional Business Intelligence (OTBI) for

Authors. Learn the basics of how to create an analysis from scratch; basic criteria building, filters, views and more.

Register for an Upcoming Training Class or Event

Hot Topics: Profile Setup & Management

Wednesday, April 28, 2021 @ 11:00am - 12:00pm

Join the IPPS Team for the next session of Hot Topics! This session will focus on the importance of profile setup and management as it relates to Concur and Oracle Procurement. Our instructors will be reviewing Oracle Procurement and Concur best practices, provide a live tutorial, and host Q&A.

Concur Travel & Expense

New KBA: How to Remove Delegate Email Notifications in Concur

A new KBA has been published outlining the guidelines to adjust your Delegate Settings to prevent sending Concur notification emails to specific Delegates. These instructions would apply to the employee user who would need to take action in Concur to adjust the delegate permissions.

Concur Live Training Courses

Concur: Event and Expense Reimbursements

Tuesday, May 11, 2021 @ 9:00am - 11:00am

The live training course will include an in-depth explanation of Concur processes related to meetings, entertainment, and business expense reimbursements. Intended for preparers, hosts/payees, and financial managers who are familiar with policy and would like to learn about more advanced terminology and concepts.

University Procurement Card Program

Tuesday, May 11, 2021 @ 1:30pm - 4:00pm

The course will include more in-depth explanations of changes to the University Procurement Card Program. The team will go over the process for card requests and card transaction reconciliation via Concur. This is not an introductory course. Participants should first complete the associated eCourse available through the UC Learning Center.

Please note that you can also search “Concur” in the UC Learning Center to browse through instructor-led Concur courses.

Visit the Training & Events Calendar for information on upcoming webinars.

Tips & Tricks

Oracle Financials Cloud

New Business Analytics Hub
The Business Analytics Hub, formerly known as reports.ucsd.edu, has had a facelift!!! Don't worry - all the Budget & Finance reports are still available in the new Business Analytics Hub. Head on over using the new URL bah.ucsd.edu, and get familiar with the new look and feel!

Lift PO Commitments in Oracle Procurement
If you are noticing PO commitments on your PPM ledger, you may lift them by closing out the PO in Oracle Procurement. If the PO has not been invoiced, you may cancel the PO via a change order. If the PO has been partially invoiced, you may reduce the PO to what has been invoiced via a change order. This process is outlined in our KBA on closing Purchase Orders.

Concur Travel & Expense

Providing Delegate Access
When assigning delegates to your Concur profile, please be sure to check all of the boxes to give your delegate full access to your Concur Requests and Expense Reports. Without this access, they will only see a Blank screen when they go to act as your delegate. Refer to our Delegates KBA for full guidance on assigning delegates.

About the Weekly Digest

Each Tuesday important updates related to Budget & Finance, including Oracle Financials Cloud and Concur Travel & Expense, are delivered to your inbox. Our goal is to deliver timely information that matters to you.

Contact us

Have questions about this edition? The best way to contact our team is via Services & Support.

Budget & Finance Support promotes training, tools, and communications to take full advantage of the financial information system and support departments' success in managing their fiscal responsibilities.
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