Payee Type

When the User pays with their Travel & Entertainment (T&E) Card, the proper payee type should always be included when submitting the payment. The payee type should be selected from the following options:

- Employee
- Student
- T/E Supplier

Concur will indicate on the expense report if the payee type is incorrect. This will impact the reimbursement of the funds and result in delays to the disbursement process.

Budget & Finance, including Oracle Procure to Pay implementation team, have noticed that the payee type is often omitted when entering transaction information. This omission may result in incorrect disbursement processes or delays to the payment cycle.

The UCSD-DSH Procure to Pay implementation team is planning to update the payee type to be a required field. This change will be implemented in the near future. In the meantime, Please note that you can also search “Concur” in the UC Learning Center for a comprehensive guide on Concur processes and best practices.

Use Case

Procure to Pay - Revising or Canceling an Order

You may lift a commitment by sending an email to Attention: Disbursements & Travel/ Rubi Ornelas. You may lift PO commitments on your PPM ledger by going to the Budget & Finance tab, the UCSD-DSH Procure to Pay tab, and then Run Report. You can view POs which are still committed on your ledger by going to the Budget & Finance tab, the UCSD-DSH Procure to Pay tab, and then View Outstanding PO Commitments.

You may query by several fields - including project, task, and financial unit - to find PO commitments on your PPM ledger. You can do this by going to the Budget & Finance tab, the UCSD-DSH Procure to Pay tab, and then Run Report. You can view PO commitments on your PPM ledger by going to the Budget & Finance tab, the UCSD-DSH Procure to Pay tab, and then View Outstanding PO Commitments.

You can also query by several fields to find PO commitments on your PPM ledger. You can do this by going to the Budget & Finance tab, the UCSD-DSH Procure to Pay tab, and then Run Report. You can view PO commitments on your PPM ledger by going to the Budget & Finance tab, the UCSD-DSH Procure to Pay tab, and then View Outstanding PO Commitments.

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