Budget & Finance Weekly Digest

May 11th, 2021 - 19th Edition

Dues for Projects: Project-Partners Grouped

Dues are set by the method of payment. When the User pays with their Travel & Entertainment (T&E) Card, the proper Payee Type should be the T/E Supplier. If the host paid out of pocket and/or with their Travel & Entertainment (T&E) Card, select Employee. The approvers are the Project-Partners Grouped, should only be used when requesting direct payments.

Event Expense Report Header

When searching for a Department Head or Special Entertainment approver, you can type % into the Approver field. Once the list has loaded, you can quickly select the appropriate approver.

The Community of Practice CoP

The CoP is a learning network dedicated to bringing the UC San Diego community together to share and crowdsource knowledge related to budget and finance matters. The CoP newsletter is a great resource to stay up-to-date on important news and developments.

Getting Ready for the Fiscal Year

May 25th webinar with learning objectives in mind. UC San Diego employees have the opportunity to learn about the Payment Compass registration process, its benefits, and how to use it effectively. The webinar will cover a variety of topics, including: setting up a profile, registering for events, and maintaining your profile information.

Payment Compass Registration: Timeline and Responsibilities

This webinar will cover the process for setting up a Payment Compass profile, including the timeline, responsibilities, and best practices. The webinar will also answer any questions you may have about the registration process.

Payment Compass Webinar

Tuesday, May 25, 2021 @ 1:30pm - 2:30pm

The webinar will cover the process for setting up a Payment Compass profile, including the timeline, responsibilities, and best practices. The webinar will also answer any questions you may have about the registration process.

Funding & Support

Explore our current training options and resources. The training options include instructor-led courses, self-paced courses, and interactive workshops. The resources include documents, FAQs, and how-to guides.

Training & Support

You can view POs which are still committed on your ledger by going to the View Outstanding PO Commitments. You can close a PO in Oracle Procurement by going to the Lift Legacy/Marketplace PO Commitments. You can close a PO in Oracle Procurement by going to the Lift Legacy/Marketplace PO Commitments.

Oracle Cost Transfer Multi-Select

This tool allows you to select multiple POs and reconcile them in one transaction. The tool is designed to make the process of reconciling POs more efficient and streamlined.

KBA on closing Purchase Orders

This article provides guidelines for closing Purchase Orders in Oracle Procurement. The article includes information on when to close a PO, how to close a PO, and what to do if you need to make changes to a PO after it has been closed.

Payment Compass: Help and Resources

You can find a variety of resources on the Payment Compass help website. These resources include how-to guides, FAQs, and contact information for the Payment Compass support team.

Contact us

To contact the Payment Compass support team, please use the following information:

UC San Diego
9500 Gilman Drive, MC 0955
La Jolla, CA 92093-0955
Attention: Disbursements & Travel/ Rubi Ornelas

If you are off campus, use the address below:

Attention: Disbursements & Travel/ Rubi Ornelas

UC San Diego
PO Box 950955
La Jolla, CA 92038-0955

If you need to return Scrip, please follow the instructions below:

Send Scrip by July 15th to receive the funds back to the department account. If you send Scrip after July 15th, it will be returned to the Scrip account.

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We identified University prepaid airfare transactions from March 30th that did not have an anticipated timeline for completion.

In the meantime, please contact KBA on closing Purchase Orders. You may also refer to the following resources:

This article provides guidelines for closing Purchase Orders in Oracle Procurement. The article includes information on when to close a PO, how to close a PO, and what to do if you need to make changes to a PO after it has been closed.

About the Budget Digest

The Budget Digest is a weekly newsletter that provides important financial news and information to the UC San Diego community. The newsletter is delivered to your inbox on a regular basis and covers a wide range of topics, including budget and finance matters. The newsletter is a great resource to stay up-to-date on important news and developments.

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