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November 2, 2021 | 44th Edition

Receipts to Concur KBA

receipts directly to Concur as outlined in the proceeding with reconciliation. Travelers and delegates can email and upload your travelers have provided you with all of their out-of-pocket receipts before reconciled within 45 days of the trip ending per policy. Delegates, ensure that expenses (T&E Card/CTS transactions, prepayments, out-of-pocket) should be As we move closer to the end of the year, please keep in mind that all travel different calendar views in the upper right corner!

Office Hours, Instructor-Led Training sessions, and Hot Topics. Be sure to try out the Click to access the Concur.

with policy and would like to learn about the expense reconciliation process in Intended for preparers, hosts/payees, and financial managers who are familiar This live course will include an in-depth explanation of Concur processes for reporting travel expenses and how to submit a Travel Expense reconciliation procedure, including summarized guidelines, resources, and This course provides an overview of UC San Diego travel policy and the Expenses course before your trip takes place. recommended that you also attend the UC San Diego Travel: Reporting the Travel & Entertainment Card, and how to take advantage of TripIt Pro. It is Faculty and staff who travel or book business travel can further their understanding of preauthorization, booking travel via Concur, prepaying with Payables. It focuses on topics such as reviewing for and populating POETAF processes for reporting travel expenses and how to submit a Travel Expense requisitions and invoices on behalf of their financial unit.

Information during the ordering process, approving requisitions and invoices, generating, and using POETAF values. If you need POETAF information or help with the requisition process, please contact FinUnit PO Requisitioners. POETAF values are calculated 

UC San Diego Travel: Before You Go

Thursday, November 4, 2021 @ 9:00am - 11:00am

UC San Diego Travel: Before You Go is an all-day training session designed for individuals who have financial responsibilities as part of their job. If you’re interested in the Financial Accounting Program, take a look at what is offered on our program website, financial.ucsd.edu. The Financial Accounting Program is a 12-week, self-paced, online course that will cover topics such as financial recording and reporting, financial analysis and decision making, and financial management. The program offers a certificate for successful completion and is available to anyone who is interested in learning more about financial accounting. To register for the program, visit the Financial Accounting Program website and complete the registration process. The program is open to anyone who is interested in improving their financial accounting skills, regardless of their current level of knowledge. For more information, contact the Financial Accounting Program office at 858-534-2300 or via email at financial.support@ucsd.edu.

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