Budget & Finance Weekly Digest



February 8, 2022 *57th Edition*

Announcements



Sponsored Projects Budget Version Naming Convention - For Fund Managers Wishing to Process

For consistency purposes, please use the following naming convention when preparing an OFC PPM Budget Version (Financial Plan) for a sponsored project. This is also the naming convention that Sponsored Projects Finance will be using when preparing sponsored project budgets.

Budget Version name should still start with the **Version Number + Description of The Action Being Taken** using keywords such as **Allocate**, **Add**, **Reallocate**, **Deallocate** + **Year The Allocation is Being Made** (e.g. Year 1, Year 2). Please see examples below:

- "Version 1: **Allocate** Year 1"
- "Version 2: **Add** Year 2"
- "Version 3: "**Reallocate** Year 2 to Resources per Budget" OR "**Allocate** Year 2 to Task XX" OR "Correct Alloc for Year 2 Supplement"
- "Version 4: **Add** Year 3"
- "Version 5: **Deallocate** per Final"

The OFC PPM Managing Award Project Budgets write-up has been updated to reflect this update.

Pre-Award Date on Awards under Federal Demonstration Partnership (FDP)

The Federal Demonstration Partnership (FDP) is a cooperative initiative among 10 federal agencies (NIH, NSF, EPA, NASA, USDA, DHS, ONR, AFOSR, ARO, AMRMC) and institutional recipients of federal funds. Its purpose is to increase research productivity by streamlining the administrative process for research while maintaining effective stewardship of and full accountability for federal funds. It features:

- 90 day pre-award spending provision
- Eliminates most of the prior approval requirements except when there is a change in the PI and scope of work
- Initiates one time no cost extension for up to 12 months
- Ability to carry forward unexpended balance to subsequent funding periods
- Allows rebudgeting
- Project relatedness

In Oracle, awards under FDP have a Pre-Award Date which is 90 days before the official start date of the Award/Contract. The initial project created with this award will have a project start date as the pre-award date. This will allow expenses that have an Expenditure Item (EI) date within the 90 day period to post to the project. Note that FDP applies only to direct funded awards from the sponsors above; it does not normally apply to federal flow-through awards unless specifically noted on the agreement.

Please see Understanding OFC PPM Award Dates for more information.

2022 Mileage Rate Updated in Concur

The 2022 reimbursement rate for the use of a private automobile for University business travel is 58.5 cents a mile. The 2022 reimbursement rate for driving an automobile in connection with a move or relocation is 18 cents a mile.

All mileage forms in Concur now calculate car mileage based on the 2022 mileage rates. For those who incurred mileage expenses in 2022, you may now claim mileage on your expense reports to be reimbursed appropriately.

Resetting *Most Recently Used* in Concur

Happening soon! – Concur will be clearing out the *Most Recently Used* section from the drop-down search menu for all GL chart string, project, & Approver fields. This effort is aimed towards removing outdated, invalid

chart string/project values that may be sitting in users' *Most Recently Used* section.

In general, the system lists any recent field selections in this section; however, if any GL chart string, project, or Approver information changes, what is listed in the *Most Recently Used* section would not be updated and may become stale. Last month, health/engineering domain emails were inadvertently imported into Oracle and Concur. Although ITS rolled back the import of these vanity emails, invalid approver emails may be displaying in some users' *Most Recently Used* section. We apologize for any inconvenience and look to reduce any confusion by resetting the *Most Recently Used* section.

Tips:

- Add your default chart string to your Profile (Concur > Profile > Profile Settings > Request/Expense Information, or check out the WalkMe walkthrough: *Complete Your Profile/Default Chart String*);
- Jot down your chart string or project information now and enter it in the Header/Allocations after the *Most Recently Used* section has been reset;
- Add a Favorite Allocation with frequently used chart string and project information; and/or
- As a best practice when completing your Request/Expense Report, search and select from the values shown below the gray horizontal line of the field's full drop-down menu – this list provides the most up-to-date values

The Finance Help Line is Now LIVE!



As of February 1, the **UC San Diego Finance Help Line is now open** for campus-wide use. The support line is staffed by knowledgeable representatives, providing simplified and improved service by expanding their service support framework.

Be sure to call in during the hours of operation, **Tuesdays to Thursdays, 10:00am - 12:00pm & 1:00pm - 3:00pm**, with questions related to topics listed in the Finance Help Line Blink page. We thank you for your continued support!

Financial Accounting Program Application Period Opens Soon!



The Financial Accounting Program application cycle is set to open again on **February 18 through March 4**. The program is intended to provide fundamental accounting knowledge that can broadly be applied to the financial work done at UCSD. However, the courses do not cover UCSD specific systems training like Oracle. If you are interested in systems training, we have a library of training videos in the Training Course Blink page.

Currently, we are looking for applicants to start in the upcoming Spring Quarter or Summer Quarter.

For those interested, please be aware that you will need to obtain your supervisor's endorsement to complete your application. If you would like to look at the form please view it in the Application Process section of the program Blink page.

For those who already applied and have yet to start the program, you should have received an email on 2/7 inquiring about your interest. If you did not receive an email and you applied during Fall 2021 or Winter 2021 and desired a Spring Quarter start, please contact financesupport@ucsd.edu.

Additional Spring Quarter Details:

- Acceptance into the program to start Spring Quarter will be announced on March 14.
- Spring Quarter Courses will begin the week of March 28 and conclude June 10.
- If you have any questions about the course structure (synchronous/asynchronous) or the time needed to participate in the course, refer to the program Blink page FAQ section.

Thank you,
Financial Accounting Program



Watch recorded office hours and more on our UC San Diego Budget & Finance YouTube channel.

Gift Funds Panorama Office Hours

Wednesday, February 9, 2022 @ 10:00am - 11:00am

Stop by for dedicated Office Hours hosted by Kierstin Sykes, Foundation Controller. Kierstin will be answering questions about the new Gift Funds Panorama.

Oracle: Buying and Paying for Financial Unit Approvers

Thursday, February 10, 2022 @ 9:00am - 11:00am

This course includes hands-on instruction on the use of Oracle Procurement & Payables. It focuses on topics such as reviewing for and populating POETAF information during the ordering process, approving requisitions and invoices, revising orders, and checking PO invoice status. This course will be especially valuable for individuals responsible for those responsible for approving requisitions and invoices on behalf of their financial unit.

Campus Budget Office: Office Hours

Thursdays, 10:00am - 11:00am

Starting February 3 until March 31, the Campus Budget Office will be hosting Office Hours every Thursday from 10:00am - 11:00am to support budget preparers throughout the planning process. This week's Office Hours will have an open Q&A. Be sure to bring any topics that you want the training team to cover!

Fund Management Office Hours

Thursdays, 11:00am - 12:00pm

At this week's office hours, Heather Sears, Director of BI & Financial Reporting, will demo a Default Project Payroll report and explain departmental practices that prevent its release into production. The remainder of the time will be dedicated to answering your fund management questions.

Accounts Receivable, Cash, & PPM Office Hours

Friday, February 11, 2022 @ 8:30am - 9:30am

This Friday, Marissa Prough, Sr. Director - PPM Strategic Design, will be discussing the PPM Redesign and cover enhancements such as contract creation, customer billing, approval process, and more.

University Procurement Card Program

Tuesday, February 15, 2022 @ 1:30pm - 4:00pm

Current and prospective cardholders will learn about updates to the card program, common uses, and the Concur processes for both Procurement Card request and transaction reconciliation.

Note that this is not an introductory course. Participants must first complete the associated eCourse available through the UC Learning Center.

Concur: Event and Expense Reimbursements

Tuesday, February 22, 2022 @ 9:00am - 11:00am

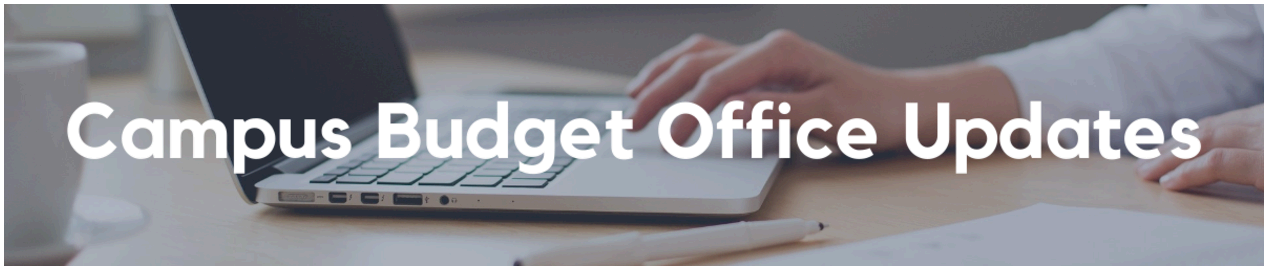
This live course will include an in-depth explanation of Concur processes related to meetings, entertainment, and business expense reimbursements. Intended for preparers, hosts/payees, and financial managers who are familiar with policy and would like to learn about the expense reconciliation process in Concur.

Hot Topics: From Cost Transfers to AP Cost Corrections

Tuesday, February 22, 2022 @ 9:00am - 10:00am

Join IPPS for its next occurrence of Hot Topics! For this session, we will be focusing on AP Cost Corrections (formerly referred to as Cost Transfers) and some changes coming to the process. This is a good opportunity to learn more about GL/PPM Cost Corrections and how this process will be updated. There will be time allotted for Q&A at the end of the session.

Click to access the Event Calendar on Blink, which showcases a consolidated view of Office Hours, Instructor-Led Training sessions, and Hot Topics. Be sure to try out the different calendar views in the upper right corner!



Training Updates

Thank you to those who attended the first week of Oracle Planning and Budgeting (EPBCS) instructor-led training! For those unable to attend the training, here are some resources available to you:

- Attend weekly Campus Budget Office: Office Hours on Zoom every Thursday @ 10:00am - 11:00am
- Watch the instructor-led session recordings here
- Review the Oracle Budget and Planning (EPBCS) eCourses in the UC Learning Center (Search for **Oracle Budget**)
- Refer to Budget & Planning Knowledge Base Articles via the Services & Support Portal for helpful steps to enter your budget in EPBCS Budget & Planning
- Join the Budget and Planning Community of Practice for the most up-to-date information

A reminder that the **budget deadline is April 1, 2022**. Thank you for your partnership during this budget development cycle!



Reminder: Centrally-billed Procurement Card and Travel & Entertainment Card
University Cards Procurement Card and Travel & Entertainment Card are corporate-billed, signifying that all transactions are paid by UC San Diego. These charges are expenses incurred but not yet posted/accounted. University Card transactions are automatically imported into Concur approximately 48 hours after making a purchase and will appear under *Available Expenses*.

Please wait until you are able to view the card transactions in Concur before claiming the expenses, then move the transactions from *Available Expenses* to an appropriate Expense Report. Timely reconciliation of University Card transactions is required.

Each Tuesday, the Weekly Digest provides important updates related to Budget & Finance, including Oracle Financials Cloud and Concur Travel & Expense.
Our goal is to deliver timely information that matters to you.

Not sure where to find answers? Get started using our Support Framework.

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UC San Diego

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