Budget & Finance Support promotes training, tools, and communications to take full advantage of the financial systems available to the UC. This article focuses on tips and tricks for managing your monthly expenses, specifically with regards to moving expenses and award funding.

### Managing Move Expenses

- **Moving with Concur:** When moving with a UC contracted moving company, please review the contracted moving company's guidelines and policies. Any expenses incurred by the new employee should be claimed on their own Concur account under the T&E Cardholder. The Concur Request ID serves as the trip authorization number that is provided to the moving company.

- **Expense Report:** Both the T&E Card and an expense report are necessary for claiming move-related expenses. The T&E Card ensures that the expenses are directly related to the move, while the expense report allows for additional documentation and proof of expenditure.

- **Accounting:** Award funding should be properly accounted for in the Concur system. Ensure that your purchase orders in Oracle Procurement are adjusted to reflect the appropriate fund and award number. This is crucial for maintaining financial integrity and ensuring that expenses are properly allocated.

### Award Funding

- **PPM Billing vs. Receivables:** The PPM User Guide is a living document updated as processes are refined. For the latest information on PPM billing, refer to KB0033288. This resource provides a comprehensive overview of PPM billing and its impact on receivables.

- **BFS Teams:** BFS teams will continue to work towards eliminating cost transfer backlogs and ensuring the proper allocation of funds. Any issues or concerns related to cost transfers should be reported to the Award Accountant.

### Additional Tips

- **Carriers:** When transporting perishable items, ensure that they are stored in proper conditions. UC carriers are trained to handle such items and have access to various sizes of freezers to ensure the longevity of the perishables.

- **Trade Street:** Route the package by Trade Street to ensure timely delivery. They have access to buildings that external carriers might not be able to reach.

- **Oracle Financials Cloud:** Oracle Financials Cloud is the central financial management system for UC San Diego. It provides a platform for managing financial transactions, including bi-weekly payables processing, Oracle Financials, and Oracle Procurement.

- **Billing & Invoicing:** Ensure that your billing and invoicing processes are streamlined and efficient. This is particularly important for transactions meant to hit Project Portfolio Management (PPM) and for the accurate reporting of expenses.

- **Fiscal Year Cutoff:** The first business day in July is the fiscal year cutoff. Ensure that all pending expenses are resolved before starting the reconciliation process. This will ensure timely and accurate reporting of fiscal year expenses.

- **Payment Products:** The PPM User Guide is a living document updated as processes are refined. It provides an overview of the myriad of payment options available at UC San Diego and how to take advantage of these products. The page also includes payment tips and strategies for processing payments.

- **PPM Guidance:** To request clarifications and additions, use the new PPM Guidance. This resource provides an overview of PPM-related processes and guidelines, including updates to PPM Billing vs. Receivables, 12 Appendix (with glossary), and updates to the PPM User Guide.

- **Fiscal Year Cutoff:** The fiscal year cutoff is a critical date for departments. All pending expenses should be resolved before this date to ensure accurate reporting and financial planning.

- **Payment Tips:** The PPM User Guide contains tips and tricks for processing payments, including information on how to manage expenses, allocate funds, and ensure accurate reporting.

- **Finance Management:** Effective finance management is crucial for the success of any project. Ensure that your department is complying with all financial regulations and guidelines to avoid any penalties or issues.