April 2024

Reminders, Updates, & News

To find published newsletters, visit our ES Admin website: https://www.sa.ucsb.edu/enrollment-services/resources/newsletters

Reminders

Travel & Entertainment | Concur Reports DUE

Complete and submit any outstanding Expense Reports in Concur As Soon As Possible. It is crucial that all travel and programmatic expense reports are allocated to their appropriate account-funds before fiscal year ends. Not only does this ensure that we have expenses hit the General Ledger in the appropriate fiscal year, but this also allows the Department Leadership and Admin Unit with expense tracking for special projects that require report submissions, identify trends for budgeting purposes and/or reconcile accounts in a timely manner.

For events and travel occurring in May and June, please submit Expense Reports soon after the event or trip is done. Travel Card transactions are typically posted 2-3 business days after a transaction is made, so please be mindful to check back in to allocate expenses to the appropriate report.

Resources: [Enrollment Services - Travel](#) | [Enrollment Services - Entertainment](#) | [Concur Knowledge Base Portal](#)

Funding and Budget Proposals | Additional and/or External Funds

In the event that you are requesting or have been approved for additional or external funding for your department, program or unit, please include the Administrative Team in your communications to ensure proper transfer of funds take place in a timely manner. Additionally, we'll support the tracking and reporting of expenses against new or unique funds, so it is essential that you loop us in the process as early as possible. This can include department partnerships for events, State Funding through UCOP or SFAC Funding requests through our Division of Student Affairs.

Personnel | Student Staff Roster Management

Student managers will have received an email today from [Kelly Casson](#) requesting updates on the employment status of their student staff. Please make sure to respond to Kelly's email by the end of this week to confirm which student staff are currently active, and to specify which students will continue working after Spring quarter ends.

As a reminder, student managers are responsible for ensuring their students' timecards are completed and approved before the sign-off deadline to avoid a delay in pay. Any shared student staff must have transfer codes added to all hours worked before approving.

Updates

Performance Evaluations | Policy-Covered (Represented) Staff

Performance evaluations for policy-covered staff will be due by June 30, 2024. Supervisors, it is time to communicate the evaluation process with your policy-covered staff. Once the process is complete, you will need to provide the employee with a signed copy of the evaluation and forward another signed copy to [Leilani Borrego](#) to include in the department's employee personnel file.

Resources: [HR Performance Development for Represented Staff](#) | [Performance Eval FormRepresented Staff](#)

Travel & Entertainment | Updated Process: Adding Initials to Request/Report Title
Our admin team has continuously been working to improve our workflows in Concur and we have recently made a few changes to be more effective in the area of account reconciliation. In the last two years, we have found that T/E card transactions have become slightly more difficult to reconcile given the way transactions post to the General Ledger. To assist us with this process, we ask that Travelers and Entertainers update the naming convention of Concur Requests/Reports. Moving forward, please submit Concur Reports with the following naming convention that includes your initials followed by event title and any relevant/additional details as long as space allows.

- Request/Report Naming Convention: [Staff Initials] [Event Name or Initials] [Date (optional)]
- Ex., AB WACAC Conference 2023; CD Council Mtg Spring 24; EF Higher Ed Week for SHS; GH Promise Grad 2023

News

ES Training Series
Enrollment Services is looking to start a new training/informational session series where we invite folks from campus departments to talk about their services or to provide refresher training on a wide variety of topics to our ES Staff. We intend to hold space for these trainings and workshops on a quarterly basis and hope that interested folks attend. Alyssa Saavedra has sent out a few calendar invitations already. If you may have missed it, please reach out to Alyssa for the calendar invite. We'll be kicking off the series with a presentation from folks from the Office of the Ombuds:

<p align="center">OMBUDs Presentation w/ Caroline Adams & David Rasch
Wed May 8, 2024 8:15am - 9:15am
UCSB Visitor Center (1102 SAASB)</p>

The Office of the Ombuds at UC Santa Barbara provides confidential consultation services to faculty, staff, students, parents, or anyone else with a campus-related concern. The ombuds addresses workplace issues, interpersonal conflict, academic concerns, policy questions, and many other problems, whether as a first step, last resort, or at any point along the way. The Office of the Ombuds is dedicated to ensuring fairness throughout the University and regularly makes recommendations for systemic change.

<p align="center">Welcome New Staff to Enrollment Services!</p>

Ruben Lubers has joined the Office of Admissions as the new *CRM Slate Manager, Application Systems*. Their first day was Wednesday, April 10, 2024.

Mariella Cazares Flores has joined the Enrollment Services Administrative Unit under the Office of Admissions as the new *Financial Assistant*! Their first day was Monday, April 15, 2024.

Carlos Espitia has joined the Office of Financial Aid & Scholarships as the new *Basic Needs Specialist under the Basic Needs Unit*. Their first day was Monday, April 22, 2024.

<p align="center">We are happy to have you join our ES Team!</p>