

August 2023

Reminders, Updates, & News

We are back with our monthly newsletter! Thank you for your patience as we completed our Fiscal Close process.

Reminders

Travel & Entertainment

As a traveler and entertainer, make sure you are aware of the Enrollment Services workflow for Request and Report submissions in Concur by reviewing instructions on our [ES Admin Unit website](#). It is your responsibility to be aware of campus policies and guidelines as well as request funding and report expenses related to University Business in a *timely manner*.



Prior to submitting reports, use the comment section to confirm or provide an explanation for any anomalies. This is important as our campus Accounts Payable unit needs confirmation of your entire timeline prior to approving reports for reimbursement. Using comments allows us to eliminate unnecessary back and forth communication between Accounting, our Admin Unit team, and the Traveler/Entertainer.

Travel Checklist (Optional)

This [Travel Checklist/Expense Tracker spreadsheet](#) can assist in projecting your estimated expenses prior to creating your request in Concur as well as help you track any expenses you have incurred. Download the form to begin noting details about your travel and related expenses. This is an optional exercise, you do not need to turn this in with your travel requests/reports.

Recharge Documentation

Make sure to forward all professional development, travel, and entertainment recharge requests and confirmations to your department's respective delegate. This is important as this documentation helps support our team during account reconciliation each month.

Ex., Transportation and Parking Services reservation requests for travel, UCen/Mosher/The Club or other campus space reservations, HR professional development course enrollment and course completion confirmations, Campus Catering confirmations and final invoices, etc.

Mandatory Training for ALL Employees

Supervisors and Employees, visit the [UC Learning Center](#) to view the status of your required training/training due or expired for your direct reports.



Updates

Zoom Phones

All Enrollment Services career staff should now be active with Zoom Phones. Review the [training material](#) to familiarize yourself with the application if you haven't already. If you are not yet set up with a Zoom Phone Line, please connect with [Leilani Borrego](#) as soon as possible.

News

Welcome to Enrollment Service Clare, Victoria, Maria, Vanessa & Jesse!

Clare Anne Agustin, Victoria Gonzalez and Maria Castillejo Huanosta have joined the Office of Admissions as new *High School Services Admissions Counselors!*

Vanessa Ponce and Jesse Quintino have joined the Office of Financial Aid & Scholarships as new *Financial Aid Advisors!*

ES Staffing Updates

Rosa Zuniga has accepted the role of *Business Systems Analyst 2* for the Office of Admissions. Their first day in their new role was on July 31, 2023.

Yulissa Rivera has accepted the role of *Event & Parent Services Coordinator* for the Early Academic Outreach Program. Their first day in their new role was on August 8, 2023.

Maria Galicia has accepted the role of *Work Opportunity Analyst* for the Office of Financial Aid & Scholarships. Their first day in their new role was on July 3, 2023.

Maribel Acevedo and Mischa Lopez have accepted the role of *Business Systems Analyst 2* for the Office of Financial Aid & Scholarships. Their first day in their new role was on July 3, 2023.

Makoa Rios has accepted the role of *VA Certifying Official* for the Office of Financial Aid & Scholarships. Their first day in their new role was on August 7, 2023.

Montse Granados has accepted the role of *Basic Needs Advisor* for the Office of Financial Aid & Scholarships. Their first day in their new role was on August 21, 2023.

**Join Us in Celebrating Britt A. Ortiz's Retirement!**

After 35 years of dedicated service in higher education across California, our esteemed colleague, **Britt A. Ortiz**, is retiring! To honor Britt's remarkable career and bid him a fond farewell, EAOP is hosting a retirement celebration.

Date: Friday, September 29, 2023

Time: 4 - 6 pm

Venue: El Centro (Bldg 406) at the UC Santa Barbara campus

Kindly RSVP by Friday, September 8, 2023, to ensure we can make the necessary arrangements.

You can RSVP by completing this form:
<https://forms.gle/yeMXQoTRCfRXf2UH9>



Week of Welcome

Week of Welcome activities will take place on September 25 - 27, 2023. Visit the [Week of Welcome SA](#) page to learn more or visit [Shoreline](#) to make note of the different events that will be taking place.

Open Positions in Enrollment Services

ADMS

Position 57448 - [Senior Admission Counselor](#)

FINC

Position 57645 - [Financial Aid Specialist](#) (2 Positions Available)

Position 56781 - [Work Study Coordinator](#)

Position 56901 - [Scholarships Advisor](#)

Position 56989 - [Financial Analyst](#)

Interested parties should visit <https://www.jobs.ucsb.edu/> to apply.

UCSB Financial Management Modernization Project

The Financial Management Modernization team will be having a virtual **Training Town Hall on Wednesday, September 13 from 10-11 a.m.** During this town hall, the FMM Training team will review the Office of Financial Training's guiding principles, share new learning resources, and discuss the initial training to be offered this fall. There will also be an opportunity for Q&A. [Click here to register for the town hall.](#)

For questions about this event or the FMM program in general, please submit a [contact form](#) on their website.