

July 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 | Expense Type & Attendees Lists

As Entertainers, you know that for each event hosted, it is important you provide a list of attendees to show and confirm the cost per person for your listed expenses. Please be sure to use Expense Type "Social & Entertainment Exp. - 10+ Attendees (Attached List)" to avoid the need to list out all of your attendees separately in the Concur system.

Resources: [Concur - How to Add Attendees](#)

Travel & Entertainment | Reviewing Outstanding Expenses

The Travel/Entertainment Corporate Cardholder is solely responsible for the allocation of expenses to travel and entertainment expense reports. As cardholders, you are responsible for reviewing expenses posted to their Concur profile and allocate them to a travel expense report in a timely manner. To ensure you are not missing allocation to final expense reports, we recommend you review your Concur profile on a weekly basis.

Failure to submit a travel expense report in a timely manner may result in the suspension and/or cancellation of card privileges.

For any concerns regarding outstanding expenses in your Concur profile, connect with your direct supervisor to confirm a course of action to allocate the expenses as soon as possible. This will allow you to move forward with your roles and responsibilities without risk of any interruptions.



Campus Recharges | Financial Backup

When making reservations on campus that require you to provide an account string for payment (HR Course Registration, Facility Rental, Catering, etc.), ensure you are providing the Final Invoice or Receipt to the Administrative Unit. This documentation is required as we ensure the charge was made appropriately and confirm proper allocation of funds during the reconciliation process.

Travel & Entertainment | Training Reminder

Our Business and Financial Unit announced the Finance 101 Summer Training Series. For Enrollment Services folks who frequently host programmatic events, or supervise those who do, we recommend you register for the following course:

Program/Event Coordinators: [Purchasing Fundamentals](#) | Tuesday, August 13, 2024 10:00 a.m. - Noon

Live Trainings/Training Schedule Linked Here: <https://financialtraining.ucsb.edu/trainings>

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

UCLC Compliance Trainings

Supervisors and Employees, visit the [UC Learning Center](#) to view the status of your required training/training due or expired for your direct reports. Ensure that career and student staff are setting time aside to complete mandatory training timely.

Resources: [UCSB Required Training](#)



Updates

Procurement | Custom Orders

It is UC Policy to use vetted and approved vendors when ordering items with a UCSB or UCSB Department Logo. This is crucial as we'd want to ensure we are ordering items from vendors following legal practices. The [CLC \(Collegiate Licensing Company\)](#), also known as Learfield Licensing Partners (they merged some time back), website allows you to search for the items you want to order to then get a list of appropriately vetted vendors you can order from. Please be sure to use this site moving forward to ensure you are in compliance with UC Policy when placing custom orders for your respective area.

If you have a vendor in mind that you believe should be added to the list, let our Admin team know and we'll work with Procurement to confirm they are viable and have them added to the list in the CLC.

Resources: [Restricted Commodities in Purchasing Training](#)

ePerformance | Roster Updates

If you are in need of having your roster for ePerformance Evaluations in UC Path updated for the 2024-2025 fiscal year, please submit a [ServiceNow HR service ticket](#). This may be necessary if you recently had a new hire join your team or if you have moved to a new leadership position.

Flexible Work Agreements | Renewals & Updates

If there have recently been updates to your Flexible Work Agreement, either your schedule or location changes, it's essential that you have an update Flexible Work Agreement in place. Additionally, if your previous Flexible Work Agreement has expired, please make sure to renew your agreement. All work arrangements require supervisor approval and a written agreement clarifying both parties' expectations.

To ensure Agreements are placed under each employees Personnel File, forward completed agreements to the Enrollment Services Admin Team: [Kelly Casson](#), [Alina Murillo](#), or [Leilani Borrego](#)

Resources: [HR Flexible Work Arrangements](#) | [Flexible Work Agreement DocuSign](#)

News

ES Training Series

Enrollment Services started 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 sessions on a quarterly basis and hope that interested folks attend. Our next session is [Travel & Entertainment](#). If you did not receive the calendar invite, please let me, [Leilani Borrego](#), know.

Travel & Entertainment w/ Sandra Featherson
Wed. September 11, 2024 8:15am - 9:15am
UCSB Visitor Center (1102 SAASB)

Visit the BFS Travel & Entertainment Website for more information: https://bfs.ucsb.edu/travel_entertainment/welcome





New Staff in Enrollment Services!

Julian Aguirre, Yuriko Chavez and Citlally Torres-Colmenares have joined the Office of Admissions as new *High School Outreach Admissions Counselors*!

Their first days were on Wednesday, July 17 (JA & YC) and Monday, July 22 (CTC), 2024.

Kynedi Verrett has joined the Office of Financial Aid & Scholarships as a new Program Assistant for the Promise Scholars unit supporting the INT-10 Transitioning to Academic Excellence course! Their first day was Monday, July 8, 2024.

We are happy to have you all join our ES Team!

Happy Fiesta!

[Fiesta Events Calendar 2024](#)

