

GGSE Administrative Processes Guidelines

Effective July 1, 2024

Updated October 1, 2024

Note that changes to federal, state, county, UC, campus and GGSE policies and practices may result in further adjustments to these processes as necessary.

The following processes are covered in more detail below. Click on each process in the list below to jump to that section. Please also note that any purchase or reimbursement requests on CCSP, TEP or EDUC funds should be sent directly to CCSP, TEP or EDUC staff as appropriate.

[Student Employment requests](#)

[Employees working out of state](#)

[Purchasing requests](#)

[NEW Business and Travel reimbursement requests](#)

[Contracts & Grants Support](#)

Student Employment Requests

To request student employment (GSR or students assistant), please complete the appropriate form (new or modification) and submit via email to your grant administrator/account manager for review and processing. Do not add any signatures to your request forms. We will review, obtain clarification if needed, ensure all fields are complete and THEN circulate via DocuSign for all necessary signatures.

If you have questions about account balances or use of the forms, please contact your grant administrator/account manager directly. The forms are posted on the [GGSE Resources page](#) under the Employment section. Please also reference the GSR and SA Hiring Procedures available there.

Employees working out of state

Employees need to go to UC Path and update their address first. Then go to the Forms Library > Access Forms to complete the Out of State Tax withholding form. Then submit this form to UCPATH via a case. This will lead to the employee's tax withholdings being updated as appropriate. For Non-Resident employees working remotely outside the US, please contact Lynn Tran (lynn.tran@bfs.ucsb.edu). **Resident employees working remotely outside the US must be on official on UC Business.**

Purchasing requests

Please send your requests to purchasing@education.ucsb.edu with as much detail as possible including the project code to charge the expense to.

Business and Travel Reimbursement requests

UCSB is using [Concur as of 2022](#), the system for expense reimbursement processing. **To allow for expense reimbursements to be processed by GGSE staff through this system you must add**

our Financial Coordinator and our Financial Student Assistants as your delegates in Concur by completing the following steps prior to submitting your reimbursement request. (You will only have to do this one time, or add/remove a delegate if an employee in these positions changes.) A short 1:34 minute video tutorial, "[Guide to Concur Delegates](#)," is available in the [Concur Knowledge Base](#).

1. Log into Concur at concur.solutions.com with your primary @ucsb.edu email address and select "Sign in with UC Santa Barbara SSO" or if prompted, enter your UCSBnetID password.
2. Add our Financial Coordinator and our Financial Student Assistants as your delegates in Concur.
 - Click on your Profile at the top right of the page, then go to Profile Settings, then select Expense Delegates. Click Add then enter all three email addresses below to select them as your delegates. Be sure to assign the permissions: Can Prepare; Can Submit Requests; and Can View Receipts,
 - **Contracts and Grants:**
 - emmamassie@ucsb.edu (Emma Massie)
 - rachelbyun@ucsb.edu (Rachel Byun, Financial Student Assistant)
 - amandanolan@ucsb.edu (Amanda Nolan, Financial Student Assistant)
 - **Clinics and Centers:**
 - jgoff@ucsb.edu (Jessica Goff, Clinics & Centers Program Coordinator)
 - kaimorquecho@ucsb.edu (Kai Morquecho)
 - Be sure to click "Save" to complete this section
 - *Please do not email them directly, and continue to send emails to reimbursements@education.ucsb.edu for inquiries and reimbursement requests.*

To request reimbursement, please follow the steps below:

1. Access the appropriate worksheet at [GGSE's Resource page](#).
2. Email your worksheet along with PDFs of any required receipts to reimbursements@education.ucsb.edu. If any additional information is needed, you will be contacted via email.
3. Please do not include any signatures on your worksheets. We will be obtaining signatures for all necessary approvals via Concur. The new digital signature currently accepted by UCSB Business & Financial Services is within Concur.
4. Save your original receipts! Originals will still be required per UCSB Business & Financial Services requirements until we hear otherwise.
5. All receipts can be uploaded via Concur's new Mobile Application with this short 1:19 minute video tutorial, "[Expenselt - Working with Receipts on Concur Mobile](#)," or their website.

Contracts & Grants Support

PIs: please continue to submit a SPOOF whenever you have a contract or grant, or send an email to CG.team@education.ucsb.edu if you have any general questions or need support on your grants.