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.

- **Expenses related to COVID-19 impacts**
- **Student Employment requests**
- **Employees working out of state/country**
- **Purchasing requests**
- **Reimbursement requests**  NEW PROCESS!
- **Contracts & Grants Support**
- **Travel Guidelines**
- **Mail processing**

### Expenses related to COVID-19 impacts
The university is working to identify department financial impacts due to unanticipated business expenses attributable to COVID-19 (coronavirus). Please alert us if your purchase or reimbursement requests fit this criteria so that it can be tracked appropriately.

Please only include additional expenses that are clearly related to coronavirus impacts and are necessary to:

- Support the health and safety of our campus population,
- To comply with CDC guidance to prevent the spread of the disease,
- To comply with UC/UCSB decisions to support campus operations.

### 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 directly. The forms are posted on the GGSE Resources page. Please also reference the hiring guidelines available there.

### Employees working out of state/country
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).

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.

Reimbursement requests
NEW PROCESS

UCSB is now using Concur, a new 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 concursolutions.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,
     • afragosa@ucsb.edu (Abbey Fragosa, Financial Coordinator)
     • nguyenha@ucsb.edu (Gwen Ha, Financial Student Assistant)
     • hannahjolley@ucsb.edu (Hannah Jolley, Financial Student Assistant)
   ➢ 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: https://education.ucsb.edu/ggse-resources
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, “ExpenseIt - 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.

Travel Guidelines
Although the COVID-19 pandemic continues, UC business related travel is now allowed and the UC Office of the President directs that all University travelers follow the latest CDC Guidance before, during, and upon return from travel. UCSB information about travel planning can be found here. Thank you for following UC policies and CDC guidance, staying as safe as possible to protect your health and the health of the UC community.

Mail processing
Daily campus mail services and delivery routes have resumed as of September 27, 2021.