

Controller's Office News

Spring / Summer 2011



Accounting • Copy and Graphics • Payroll • Procurement • Student Financial Services

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What's Happening

These are exciting announcements we want to share:

New Bulletin Board for Faculty, Administrators and Staff

Now available, on the Controller's website, is information specifically geared to USD faculty, administrators and staff that

Letter from the Controller

Dear USD Community,

This fiscal year had been a year of enhancements and process improvements. We are pleased to highlight a variety of new services implemented in this newsletter. We also have a few exciting projects underway and would appreciate your comments, feedback and support as we continue to seek ways to better serve the community. Among other things, we now have a separate expense reimbursement unit dedicated to handle all employee reimbursements and related transactions. We have identified a new preferred office supply vendor that will be providing better pricing and product selections. We have also partnered with new collection agencies to enhance our collection effort. The Oracle R12 upgrade is well underway, with preliminary go-live date in December 2011. We are looking to streamline our vendor invoice and expense report approval and submission process by adopting a new electronic solution, aimed to reduce manual processes and move into a paperless environment. I encourage you to look for future announcements on these exciting projects. Last, I want to take this opportunity to thank everyone for their support in the past seven years as I leave the university to accompany my husband for his new leadership role in Indiana. It has been an honor serving the University of San Diego. ~ **Vivian Standifird**

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New Expense Reimbursements and Corporate Card Program unit

Effective April 2011, we have a new Expense Reimbursements and Corporate Card Programs unit within the Office of the Controller. This unit will assume responsibility for processing, addressing, and enhancing our service to the university through dedicated, consistent, and focused attention on all employee expense reimbursement issues. The primary goal of this unit is to better serve the campus on all employee reimbursements and related transactions



*From left to right:
Regina Valdez, Frances Kuhn, Darren Ortiz*

administrators and staff that provides helpful information, updates and Frequently Asked Questions.

The first, called Student Services Staff Bulletin Board, is located on the [Student Financial Services](#) page under Student Accounts.

Your mySanDiego login information will be required to access this page when you click on it.

Suggestions, questions and topics of interest will be welcome from the campus community.

Updates to the Payroll Website

There is a new bullet point section listed on the Payroll website, entitled [Foreign National Information](#). Here you will find information that is important to employees who are non-resident aliens.



Alcalá Card

The Office of the Controller and Auxiliary Services are pleased to announce the availability of the new Alcalá Card. The new Alcalá Card will replace the current departmental bookstore cards and Dining Advantage cards. All existing cards will be

while protecting the university. Although this balance will be challenging, we have formed an excellent team that is excited and empowered to tackle these responsibilities. The unit consists of the Manager of Expense Reimbursements and Corporate Card Programs (Frances Kuhn) and two Expense Reimbursement Coordinators (Regina Valdez and Darren Ortiz). We have also created two central e-mail boxes to address your expense reimbursement and corporate card questions. They are expense@sandiego.edu and travelcard@sandiego.edu respectively. Please reach out directly to them on any expense reports, corporate cards, or employee reimbursement matters. If you need additional contact information, please visit: www.sandiego.edu/expense.

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New E-Reimbursement Service

We are pleased to offer an exciting new service related to your business expense reimbursement. Employees who have direct deposit for paychecks are now able to receive their expense reimbursement via direct deposit. Enrollment in this program is a simple click of a button via the MySanDiego portal. Simply log on to <https://my.sandiego.edu>, go to the Employee tab, and select the new service



election channel right above the blue holiday schedule. Everyone is encouraged to enroll even if you currently do not anticipate any expense reimbursements.

Please note that employees must be enrolled in the payroll direct deposit program to be eligible for this service. To enroll in direct deposit for both payroll and expense reimbursement, please [click here](#). Also, please note that expense reimbursements cannot be split among multiple accounts. If your paycheck deposit is allocated among multiple accounts, your expense reimbursement will be deposited to the last account shown in the Oracle Employee Self-Service (Note: In most cases, this is the account with the largest paycheck deposit allocation). You can confirm your account via Oracle Employee Self-Service or by calling Dorothy Smith in the Controller's Office at ext. 2302. Dorothy will be able to provide you with the last four digits of the account selected for expense reimbursement.

By selecting expense reimbursement direct deposit over the traditional check method, you will be able to receive your payment at the earliest possible time without having to wait for the check in the mail or going to the bank to make the deposit. Plus, you will help further the university's sustainability effort by requiring fewer printed materials. If you have any questions or concerns regarding this program, please contact the Controller's Office at smithdo@sandiego.edu or at ext. 2302.

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Release of the Annual Endowment Reporting Package

deactivated as of March 31, 2011. The new card is designed to provide an efficient way to pay for eligible business-related expenses at the Torero Store and at our dining establishments on campus.

For more information, please [click here](#).

New Features to Cliqbook Online Travel Tools

There have been updates to a new version of Concur Cliqbook, our online booking tool for travel-related items. The new interface offers some nice enhancements:

- Price and schedule combined on one page for easier navigation and viewings
- Ability to search for nonstop flights outside of chosen time window
- More interactive flight display — with "sliders" that enable you to choose flights within an expanded time range — and an added feature that allows you to choose flights resembling other schedules with a "MORE LIKE THIS" option

For more information, please [click here](#).

Excel for Noetix

If you recently upgraded to Microsoft 07 or 10, you might need to download web components from the Microsoft website in order to

The Office of the Controller is pleased to announce the early release of the 2010 Annual Endowment Report, FY10/11 Final Spending Allowance and FY11/12 Base Spending Allowance. These reports are prepared annually to assist with planning and monitoring endowments and serve as a tool for communicating with endowment donors about the status of their individual accounts. The reports were distributed to vice presidents, deans, the Office of Development, the Office of Financial Aid and athletics directors as an electronic document via e-mail to reduce costs associated with publication and support the university's sustainability efforts.

Each report is designed to provide specific information about individual endowment accounts as follows:

2010 Annual Endowment Report

This report provides a summary of key historical factors for each individual endowment including: donor restrictions, funding purposes, endowment balances and spending allowance.

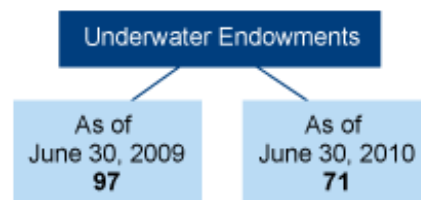
Final FY 10/11 Endowment Spending Allowance Report

This report provides the final spending allowance including the amount carried forward from the prior year. The university allows carry-forward of any remaining or unspent spending allowance to the next fiscal year as an addition to the calculated spending allowance (base allowance). Endowment administrators should note that, in accordance with our spending policy, available carry forwards have been limited to 12 percent of the last fiscal year-end's fair market value. Per the policy, over-the-limit carry forwards are returned to endowments to help them grow unless the administrator has provided an explanation and been granted an exception.

FY 11/12 Base Spending Allowance Report

This report provides the base spending allowance for the FY 11/12 year to assist administrators with planning in advance of the FY 11/12 budget season. Due to economic conditions experienced in FY 08/09, several endowment accounts continued to be

"underwater" and did not generate spending allowances for the year. Although the market has improved, we still have a number of endowments that are underwater.



We will again provide a petition process for underwater endowments. This information will be forthcoming in early spring. For more information please visit our website at www.sandiego.edu/administration/businessadmin/accounting.

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E-signature Coming to USD Campus

The University of San Diego is currently working on replicating what big businesses do today — using e-signatures. This option is popular everywhere and there are many reasons why.

How convenient is it when a website asks you questions about your identity prior to allowing

Did You Know?
Did you know that the University of San Diego is implementing a new e-signature process to streamline processes and

export Noetix into Excel. Please [click here](#) for more information.

Campus Voice

On August 19, 2010, the staff of the Office of Financial Aid (OFA) was treated to a delicious pre-fall semester barbecue by Rosemary Stallbaumer and her Student Financial Services staff. It was a surprise invitation at a stressful time and it was greatly appreciated by the OFA staff. Associate Provost Dr. Tom Herrinton was also a guest for the tasty event. Kudos to the generous and resourceful staff of Student Financial Services!

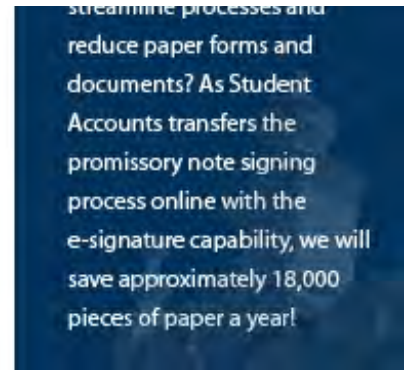
Judy Lewis Logue,
Director of Financial Aid

access to your account information; questions only you would have the answers to right on the spot? USD's new E-Signature Program is one similar to verifying compliance need and integration just as other major companies do. Aside from saving time by eliminating the process of hard copy signatures requiring the additional steps of scanning/faxing/mailing the document, there are many other benefits of moving to an electronic signature system. Here are just a few:

- **Reduces Waiting Time:** If you typically wait until you have a signed agreement to commence work, you can be waiting days or even weeks to get started. It's faster and easier for students/parents to make a couple of clicks in order to sign the agreement and give you the go ahead to get started.
- **Saves Money:** Saves on costs of paper, ink, and postage. Plus, it's better for the environment!
- **Provides Copies for All Parties:** Once the agreement is signed, all parties receive a digital copy, which makes it easier for them to refer to it later and file it on their computer.
- **Creates an Archive:** Many electronic signature services include archiving functionality so you have all of your active documents easily accessible in one place.
- **Increases Security:** Electronic signatures offer digital encryption, and it's much harder to fake your identity when signing electronically.

By minimizing our organization's dependence on ink and paper, we can reduce the environmental impact of doing business. Today, people expect universities to be environmentally conscious. Implementing methods to protect the environment will enhance USD's reputation. Statistics have shown a marked increase in the number of people preferring universities using environmentally safe business practices.

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Online Transcript Request Services

Thanks to the efforts of the Registrar's Office, Student Accounts Office, One-Stop Student Center and ITS, any USD student enrolled after the summer of 2008 may now request an unofficial or official copy of their transcript online. The USD website populates all information for the students, from their personal address and phone number to information about the college/university to which they want the transcript sent. Or, if students are sending transcripts to themselves, the system provides a drop-down menu of all recorded addresses on file with the option to choose.

Did You Know?

Did you know students are now able to request transcripts online? Since its inception in August 2010, approximately 1,400 students have made online requests for transcripts.

The process is simple. Log on to <https://my.sandiego.edu> and click on the One Stop Services tab. In the top right corner of this tab, you will then find a box entitled Academic Records Tools. From there, students may request either an unofficial transcript (for free – all information is readily available on line and ready to print on the spot), or an official transcript (price varies based on requested delivery method).

Options for delivery of official transcripts include:

- Pick up in One-Stop - \$5.00 per official copy
- Standard Mail - \$5.00 per official copy
- Priority Mail - \$20.00 per official copy

Students are given the option to pay with either a checking or savings account online. If there is any type of hold on the student's account the system will not allow the request to go through; however, there is an option to View Transcript Holds so the student can determine the cause of the hold and take any necessary action to release it. Another exciting option is the ability to view final grades. Also, a student may request anywhere from one to 10 copies at a time, with the option to "Hold For Grades" or "Hold for Degree," too.

This newly advanced process has reduced the turnaround time associated with transcript requests and delivery by almost one week — allowing the requests to be sent immediately after processing. Students enrolled prior to summer 2008 will eventually be phased in to this process, based on IT resources and availability. Please help spread the word and encourage students to take advantage of this exciting new service.



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T&E and Preferred Vendor Benefits



The more employees there are enrolled with our



Tell Us What You Think

This newsletter is a product of excellent teamwork. Members of the newsletter committee include:

Safie Taheri, *Chair*

Vivian Standifird,
Advisor/Editor

Frances Kuhn,
Committee Member

Edgar Moreno,
Committee Member

Rocio Rivera,
Committee Member

Yolanda Loyo-Rodriguez,
Committee Member

We would also like to thank The Department of Marketing and Strategic Partnerships Services for its assistance in making this e-newsletter very user friendly. We want to know what you think and how to make this newsletter even better.

- What's your favorite article?
- What would you want to see more information about?

E-mail us your response for a chance to win fabulous prizes.

We welcome your comments and questions. Please contact us at ext. 2302, or via e-mail at accounting@sandiego.edu.

preferred vendors, the greater the number of benefits distributed to employees and their families. To enroll in the various programs, go to the USD preferred travel vendor website at www.sandiego.edu/travel. Gift cards, free rental certificates and other benefits are provided for each business or leisure rental reservation made. Everyone is encouraged to sign-up and take advantage of these great deals.

It is important to note individuals still receive their own personal frequent flyer miles on top of or separate from enrollment-related discounts. American Airlines provided three free roundtrip tickets, flying to/from anywhere in the U.S. to the USD community. Enterprise Rental Car provides one free rental for every 15 rental days. Enterprise also held a raffle at the most recent USD Health Expo. Each individual who signed up for the rewards program was eligible to win \$50 gift cards.

Double rental credits and 10 percent off shuttle reservations are some of the additional benefits offered. USD is also working with many new vendors to bring additional discounted offers to the USD community. One example is the possibility of obtaining discounted pricing on airline tickets for travel both within the U.S. and possibly to foreign countries, as well.

The T&E Card program is a university-sponsored Visa credit card issued to qualified USD employees at no charge. The T&E Card can be utilized for all travel and entertainment expenses including airfare, lodging, car rental, meals and other incidental costs. The goal of the T&E Card program is to reduce the need for out-of-pocket expenses. A person is eligible for this program if a) approval obtained from his/her supervisor and budget administrator; b) Travels on business on a regular basis or organizes or participates in official University events or functions (e.g., local business meals, conferences, etc.).

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Did You Know?

Our T&E card, preferred vendor programs and other vendor partnerships' efforts contributed toward three free roundtrip American Airlines tickets being given away; plus 40 free car rental days were distributed based on usage of our preferred renters. Your department could be next — look for our preferred vendors at the upcoming USD events and sign up!

Burdened Benefit Rates – FY 2011-2012

The University of San Diego has two different types of burdened benefit rates. The non-federal rate is used to calculate benefits associated with non-federal awards and the federal rate is associated with federal awards. There are both benefits based (BB) and non-benefits based (NB) percentages associated with the non-federal and federal rates. The rates will change and will be effective on July 1, 2011 (Fiscal Year 2011-2012). Please see the chart below for the non-federal and federal burdened benefit rates.



Burdened Benefit Rate

2011-2012	BB	NB Non-student	NB Student
Non-Federal	34.77%	9.68%	1.39%
Federal	29.00%	8.00%	8.00%

2010-2011	BB	NB Non-student
Non-Federal	34.77%	5.43%
Federal	29.00%	8.00%

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Mission Statement

The offices of Accounting, Copy and Graphics, Payroll, Procurement and Student Financial Services will provide outstanding customer service, accurate and timely information with a positive attitude and integrity. We will be recognized for our new ideas, our reliability and our commitment to bring the University of San Diego to a higher level. We will support each other and our and our customers by staying open-minded, communicating and listening, while building relationships with the USD community.

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