April 23, 2025

UCSB Financial Management Modernization

Program Update Town Hall

UC SANTA BARBARA

Agenda

- Opening Remarks
- Update on IT Transformations
- Departmental Readiness
  - Training
  - Fiscal Close
  - Projects & Grants Management Impacts
- Break
- Data Warehouse & Reporting
- Gateway Reminders
- Next Steps & Q&A

Opening Remarks

Josh Bright

Update on Ongoing Transformations

Shea Lovan & Manny Cintron

Secure UCSB:
Cybersecurity Training Deadline

April 30

Users whose training has expired have until this date to complete it before losing access to apps behind Single Sign On (SSO) like Gmail, Timekeeping, UCPath, and more.

- One-time, 24-hour extension
- Faculty emeriti are currently exempt
- Student employees must complete it

Secure UCSB:
Multi-factor Authentication (MFA)

UCSB will be implementing the following changes to Duo MFA

May 7

01

SMS/text codes and phone callback will be disabled

Users who receive SMS/text codes or a phone callback from Duo to log in to UCSB applications will need to **download the Duo Mobile app on their device or request a hard token.**

02

Duo Verified Push will be deployed

Duo will display a unique 4-digit verification code in the login window of the protected application. The user **enters this 4-digit code into their Duo Mobile app to complete the authentication process**.

Timekeeping Refresh: Live on Sunday, May 11!

Training & Support

- Training **REQUIRED** for users with elevated access (payroll managers & timekeepers)
  - Available now; **must be completed before May 11**
  - *Optional* training for managers and employees released in the coming weeks
- **Office hours every Monday & Thursday from 1:30-2:30pm**
  - For users who have completed training and have department-specific questions

Timekeeping Refresh: Key Reminders

- Personal Hyperfind queries in Kronos will **not** transfer over to the new WFM system. Please document or screenshot these if needed.

- Schedule data will be pre-populated in WFM *only if specific criteria is met*. Refer to the most recent project update sent to timekeepers on April 17 for more details.

Departmental Readiness

Training Update

Sandra Featherson

Training Update: By the Numbers

6
Tools and Guides

48+
Sessions Delivered or Planned

243
OFT Mailing List Subscribers

23
Office Hour Sessions Delivered or Planned

509
Unique Attendees

10
Core Subjects (so far!)

68
Evaluation Responses

10
Trainers

Training Focus: May-June

Additional Topics Added as Needed

Continued Topics:

- Gateway Business Process Changes*
- Concur Business Process Changes*
- Understanding the Common Chart of Accounts
- CCOA Office Hours
- Role Security Administrator Training and Office Hours*

*= e-learning available

New Topics:

- Accounts Receivable Business Process Updates and Deep Dive *(Pilot Depts)*
- Gateway Roles *(eLearnings)*
- Projects and Grants *(various topics)*
- Internal Recharge Billing
- Income & Recharge Management in Future State
- Transfers
- EPM: Terminology and Reporting
- FinHub and Reporting

What Training do I Need and What is Required?

Learning Pathways

- Roles and systems
- Updated as additional training is available
- Will incorporate available reports
- Available on the Office of Financial Training website

UC SANTA BARBARA
Office of Financial Training
Finance & Resource Management

Learning Pathways
Persona / Duties Matrix
Research Financial Analyst (RFA)

Job Function	Research Financial Analyst (RFA)
Required Understanding	• Post-Award Roles & Responsibilities Matrix *(coming soon)* • Common Chart of Accounts (CCOA) • Project Analyst in Learning Pathways for Gateway and Concur
Required Training* by 6/30/25 for systems access (view schedule)	• OFC Overview • PGM Overview • Introduction to Managing Sponsored and Faculty Projects in OFC • Sponsored Awards: Post Award Roles & Responsibilities • Sponsored Awards: Award Setup & Maintenance in PGM (3-part series) • Cost Transfers • Sponsored Awards: Post Award Forms and Communication • Project Analyst in Learning Pathways for Gateway and Concur • FinHub *(coming soon)*
Required Training* by 9/30/25 for access maintenance (view schedule)	• Sponsored Awards: Costing & Financial Management • Sponsored Awards: Subawards & MCAs • Sponsored Awards: Deliverables, Billing, and Cash • Sponsored Awards: Award & Project Closeout and Final Reporting • Sponsored Awards: Managing Cost Share • Sponsored Awards & Faculty Funds: Portfolio Overview • Fabrications • EPM - Project Forecasting
Recommended Training* (view schedule)	• EPM - Terminology and Financial Reporting • EPM - Commitments • EPM - Transfers • Goodbye, GUS; Hello, Grand Unified System • Project Analyst in Learning Pathways for Gateway and Concur • Understanding the Common Chart of Accounts

Persona (Access to be assigned in OFC)	• Research Financial Analyst
	• Project Analyst *(named role in PGM)*
	  ○ Requires Gateway Project Analyst shell role
	  ○ Requires TOE Project Reviewer shell role
	• TOE Preparer

Reports	• GL PPM Reconciliation Report in OFC • Award Master Data Report in OFC

***Some trainings may still be in the process of being scheduled.**
For the most up to date training schedule visit the Office of Financial Training website and subscribe to the Office of Financial Training email list.

May Training Now Available!

Office of Financial Training Calendar : OFT Training by Topic

Topic	Month	Date	Title	Start Time	End Time	Mode
Accounts Receivable	2025 04	April 23	External Billing for Pilot Departments	1:30 PM	3:30 PM	Virtual
Accounts Receivable	2025 05	May 6	External Billing for Pilot Departments	1:00 PM	3:00 PM	In Person
Accounts Receivable	2025 05	May 28	External Billing for Pilot Departments	1:00 PM	3:00 PM	Virtual
Accounts Receivable Total						
CCOA	2025 05	May 7	CCOA Office Hours (drop-in only -- no registration required)	11:00 AM	12:00 PM	Virtual
CCOA	2025 05	May 13	Understanding the Common Chart of Accounts	10:00 AM	11:00 AM	Virtual
CCOA	2025 05	May 20	CCOA Office Hours (drop-in only -- no registration required)	10:00 AM	11:00 AM	Virtual
CCOA	2025 05	May 29	Understanding the Common Chart of Accounts	3:00 PM	4:00 PM	Virtual
CCOA Total						
Concur	2025 04	April 30	Concur Business Process Changes	2:00 PM	3:00 PM	Virtual
Concur	2025 05	May 1	Concur Workflow Deep Dive and Best Practices	10:00 AM	11:00 AM	Virtual
Concur	2025 05	May 14	Concur Workflow Deep Dive and Best Practices	1:00 PM	2:00 PM	Virtual
Concur	2025 05	May 20	Concur Workflow Deep Dive and Best Practices	11:00 AM	12:00 PM	Virtual
Concur Total						
EPM - Terminology	2025 05	May 7	EPM - Terminology and Financial Reporting	9:00 AM	10:00 AM	Virtual
EPM - Terminology	2025 05	May 15	EPM - Terminology and Financial Reporting	3:00 PM	4:00 PM	Virtual
EPM - Terminology Total						
EPM - Transfers	2025 05	May 30	EPM - Transfers and Revenues	9:00 AM	11:00 AM	Virtual
EPM - Transfers Total						
Gateway	2025 04	April 29	Gateway Business Process Changes	10:00 AM	12:00 PM	Virtual
Gateway Total						
PGM	2025 04	April 23	PGM Office Hours (drop-in only -- no registration required)	3:05 PM	4:00 PM	Virtual
PGM	2025 04	April 24	Sponsored Awards: Award Setup & Maintenance in PGM (Part 3)	10:00 AM	12:00 PM	Virtual
PGM	2025 04	April 28	Sponsored Awards: Costing & Financial Management	10:00 AM	12:00 PM	Virtual
PGM	2025 04	April 30	PGM Office Hours (drop-in only -- no registration required)	3:05 PM	4:00 PM	Virtual
PGM	2025 04	April 30	Sponsored Awards: Subawards & MCAs	10:00 AM	12:00 PM	Virtual
PGM	2025 05	May 7	PGM Office Hours (drop-in only -- no registration required)	3:05 PM	4:00 PM	Virtual
PGM	2025 05	May 14	PGM Office Hours (drop-in only -- no registration required)	3:05 PM	4:00 PM	Virtual
PGM	2025 05	May 21	PGM Office Hours (drop-in only -- no registration required)	3:05 PM	4:00 PM	Virtual
PGM	2025 05	May 22	Goodbye, GUS; Hello, Grand Unified System	10:00 AM	12:00 PM	Virtual
PGM	2025 05	May 27	Sponsored Awards: Deliverables, Billing, and Cash	9:00 AM	12:00 PM	Virtual
PGM	2025 05	May 28	Faculty Funds Business Process Awareness Part 1	1:00 PM	3:00 PM	Virtual
PGM	2025 05	May 28	PGM Office Hours (drop-in only -- no registration required)	3:05 PM	4:00 PM	Virtual
PGM	2025 05	May 29	Sponsored Awards: Award & Project Closeout and Final Reporting	10:00 AM	12:00 PM	Virtual
PGM Total						
Recharges	2025 04	April 28	Internal Recharge Billing	2:00 PM	3:30 PM	Virtual
Recharges	2025 05	May 19	Income & Recharge Center Management in Future State	10:30 AM	12:00 PM	Virtual
Recharges Total						
RSA	2025 04	April 29	Role Security Administrator Training	3:00 PM	4:00 PM	Virtual
RSA	2025 05	May 5	Role Security Administrator Training	10:00 AM	11:00 AM	Virtual

E-Learning Courses Available in the UC Learning Center

- Introduction to Managing Sponsored and Faculty Funds Projects in OFC (PGM)
- BFB-IS-3 Electronic Information Security (RSA)
- Income and Recharge Centers at UCSB
- Gateway Business Process Changes
- Concur Business Process Changes

Coming Soon:

- Role Security Administrator Training
- EPM - Terminology and Reporting

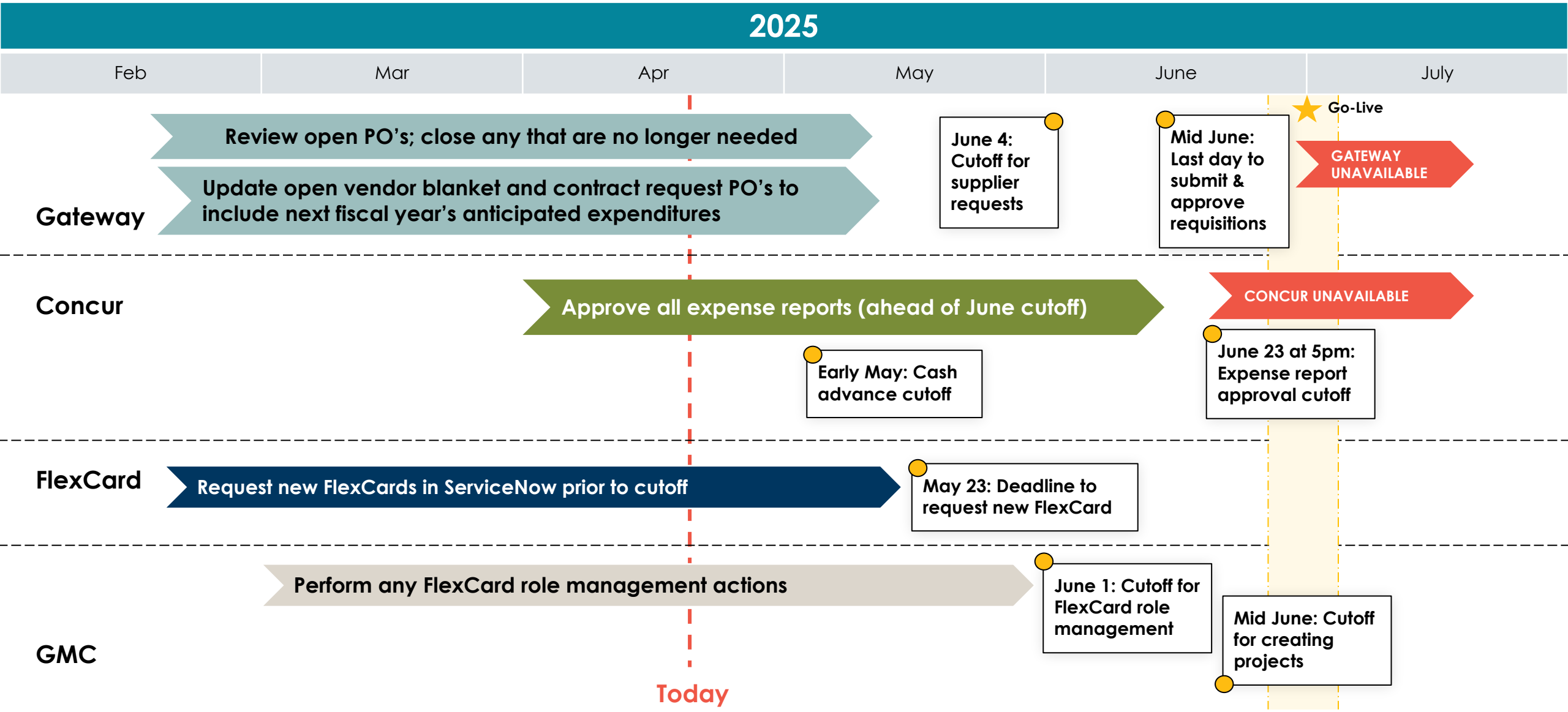
Training Summary

- Current course offerings available on the Office of Financial Training website and FMM website
- Registration in UC Learning Center
- Schedule is ongoing & dynamic
  - New topics continuously added
  - Additional sessions as needed
- Sign up for the OFT mailing list
- System Access for Go-Live - Coming Soon

Fiscal Close

Jim Corkill

Fiscal Close Prep: Actions for Depts



Fiscal Close Prep: Actions for Depts

2025

Feb | Mar | Apr | May | June | July

Go-Live

TOE

Closely monitor and maintain reconciliations, cost transfers, & projected balances; ensure no overdraft

June 30: TOE approval cutoff

May 31 deadline for escalated transfers older than 120 days:
- All UFIN cost transfers (non-payroll)
- UCPath SCTs

June 13 deadline for non-escalated transfers older than 120 days:
- All UFIN cost transfers (non-payroll)
- UCPath SCTs

TOF & TOSF

Submit any TOSF changes to be reflected in OFC

May 31: TOSF approval cutoff

Submit any PERMS to Budget Office before cutoff

June 20: PERM approval cutoff

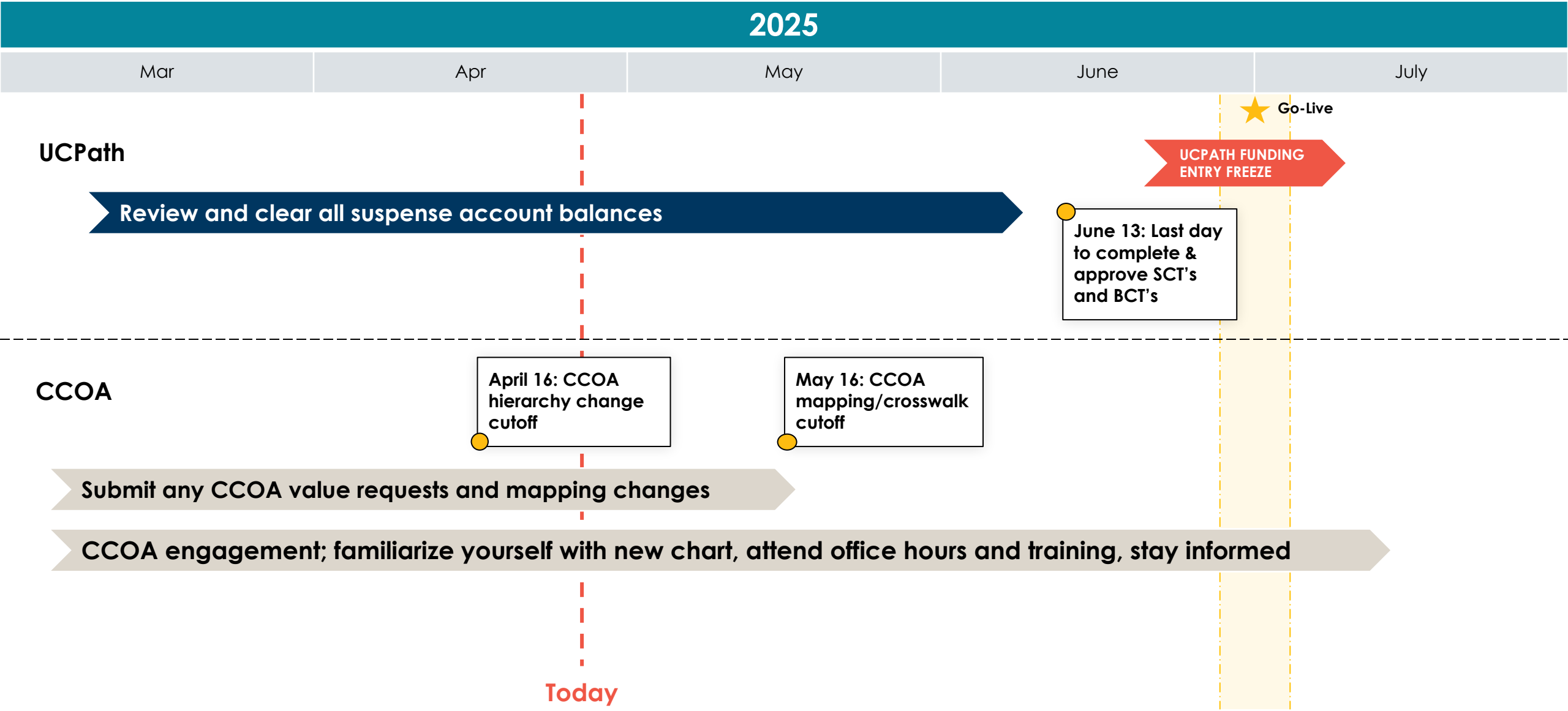
Staffing Process

Input all EBD transactions used to balance staffing in UCPath

May 31: Budget Office staffing snapshot cutoff

Today

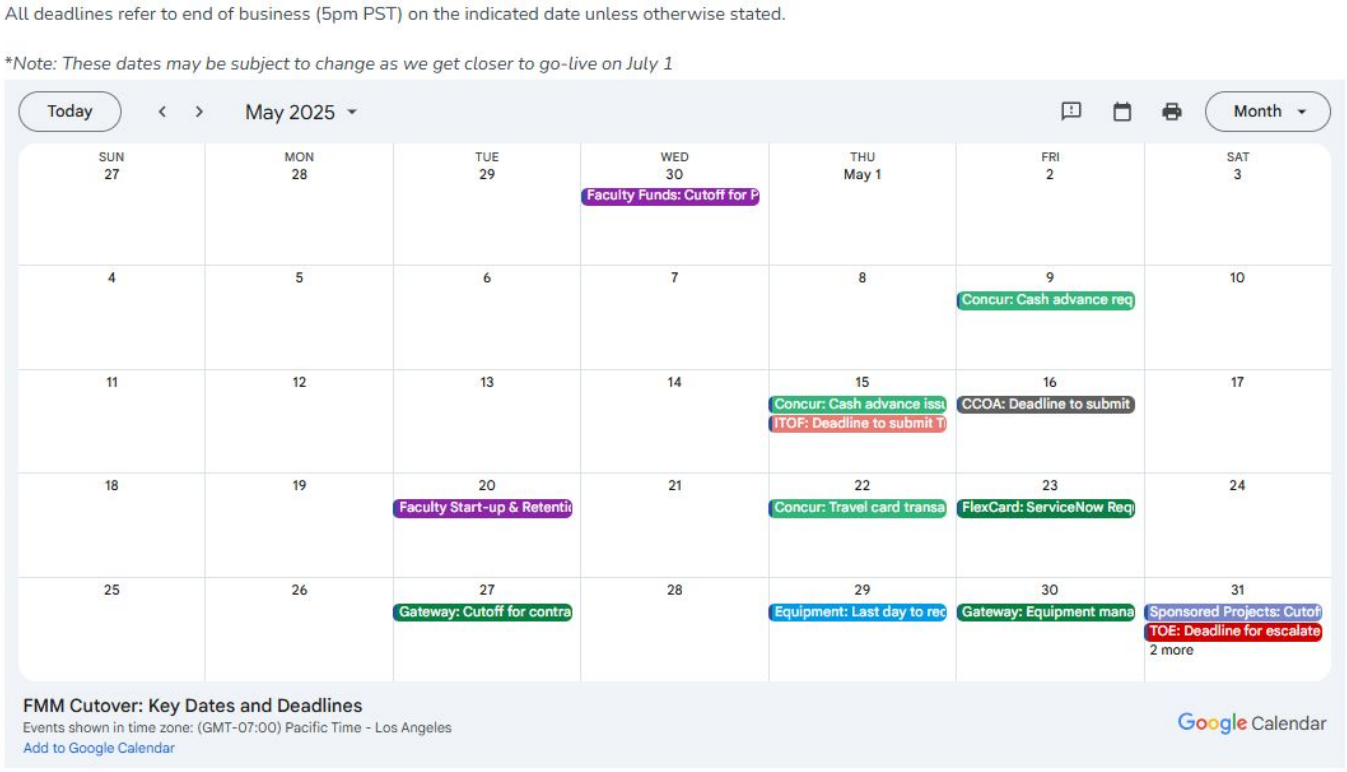
Fiscal Close Prep: Actions for Depts



Staying Informed: Cutover Calendar

financemanagement.ucsb.edu/prepare

- Key information and tools for departments (i.e. training, checklists) will be provided here
- Check back regularly for most up-to-date information



Key Consideration: Payroll Expenditures

Critical Deadlines on Friday, June 13

- **Suspense Account Transfers:** Ensure all suspense account balances (89996, 89997, 89998) are reviewed and cleared
- **Finalize Pending Direct Retro Transactions:** Departments must approve or cancel all pending DR transactions by this date

These activities are required to ensure a smooth transition to the new CCOA!

Review materials provided by BFS for guidance and submit a ServiceNow ticket if you require assistance

Projects & Grants Management Impacts

Jane Kittle

Specific Deadlines Impacting PGM Activities

- Mid June cutoff date for GMC project creation does not apply to PGM conversion. See PGM-specific deadlines for project conversion.
- Requisitions **or** UCPath Funding Entries created using new project values established in GMC during the month of June may fall out in chartstring conversion.
- Expenses erroneously charged to non-extramural sources prior to July 1 **cannot be transferred** via TOE or SCT once we go-live.

Other Impacts to PGM Activities

The following legacy project types will <u>not</u> have a mapping to future state values:

- Committed Cost Share
- Faculty Start-Up
- Faculty Retention
- Sponsored Fabrications *(where 1:1 mapping isn't possible)*
- Non-GUS faculty funds projects

Summer Salary Process Impacts

Departments should start the Summer Salary process early this year for extramural awards*

- Help ensure that UCPath entries are processed prior to key cutoff dates
- Allow for accurate conversion of chart strings during the July cutover
- Prevent any issues with late or missed pay for faculty members across campus

**It is recommended that summer salary entries in UCPath be delayed until post go-live for funding strings without a direct mapping to future state projects (faculty start-up, faculty retention, as well as faculty funds projects housed in non-GUS departments). This will limit conversion issues that could result in corrections needed via salary cost transfers.*

Key Dates:

- All summer salary entries must be submitted and approved by **Tuesday, June 17**
- Salary Cap/Multiple Components of Pay Worksheet (MCOP) **available after July 7**

Streamlining the Process:

- Academic Departments may utilize the updated Summer Salary form to help facilitate this. If you do not use this currently and wish to, contact Daniela Navin (navin@research.ucsb.edu)

Deadlines: Sponsored & Faculty Funds Projects

2025

Mar	Apr	May	June	July	Aug

Sponsored Projects

May 31: Cutoff for budget updates (via GUS and/or TOSF)

Any updates after this date will not convert from legacy systems and must be handled in OFC after go-live using new business processes

Faculty Start-Up & Retention Funds

April 25: Validate 6/30/24 balances and report expenditures from July 2024 through March 2025

This Friday!

6/30/24 balances provided by Dean's office

May 20: Report expenditures for April 2025

Faculty Funds (Non Start-Up & Retention)

April 30: All eligible projects must be added to GUS or the PGM conversion sheet

Projects added after this date (or that do not meet requirements) will not be converted and will be created in PGM after go-live with new business processes

Eligibility Requirements:
Award end dates beyond 6/30/25
Positive balances as of 5/31/25

June 15: Reconcile 5/31/25 balances for projects flagged for conversion

If reconciled balances on this cutoff date is $0 or less, the project will not be converted

Key Impacts: Sponsored Projects

Important Note on Balances at Go-Live:

- Only sponsored awards, projects, and budgets through May 31 will be converted to OFC on July 1
- *Costs* through June 30 converted separately in late July or early August
- PGM balances will be incomplete until all data is loaded
- **Departments may need to reference GUS or EZ Access for accurate reporting in the interim**

Key Impacts: Sponsored Projects

For new awards received in June:

- Converted at the end of July (one OFC project per legacy account)
- Budgets mapped from legacy sub to OFC categories
- Costs mapped from legacy accounts to OFC projects
- **No spending allowed until conversion is complete**

If this delay impacts critical work, contact fmm-pgm-conv-leads@farm.ucsb.edu

Key Impacts: Faculty Funds Projects
(excluding start-up & retention)

- Projects converted through May 31 may have June activity that is not reflected in OFC on July 1
- **Departments should monitor for potential overspending.** Final balance adjustments will be made by Academic Affairs & Research Division in early August
- The June 2025 GL should be reconciled immediately after the preliminary ledger is released
  - Deadline for this activity TBA

PGM Cutover: What to Expect

- Effective July 1, GUS will be replaced with Oracle Financials Cloud

- Tracking and reporting of projects and expenditures will be available in FinHub. The new Faculty & PI Dashboard will provide enhanced functionality, including:
  - View award and project activity across the organization by PI
  - Drill down to award and project details
  - Daily data refresh

Training Requirements?

UC SANTA BARBARA
Office of Financial Training
Finance & Resource Management

Learning Pathways
Persona/Duties Matrix
Faculty Funds Projects - Project Analyst

Business Use: For staff who manage and approve transactions on faculty funds projects, such as start-up, retention, internal awards, and discretionary funds

Job Function	Named Project Analysts on Faculty Funds Projects in PGM
Required Understanding	• Common Chart of Accounts (CCOA) • Project Analyst role in Learning Pathways for Gateway and Concur
Required Training* by 6/30/25 for systems access (view schedule)	• OFC Overview • PGM Overview • Introduction to Managing Sponsored and Faculty Projects in OFC • Faculty Funds Business Process Awareness (3-part series) • Cost Transfers • Project Analyst trainings in Learning Pathways for Gateway and Concur • FinHub *(coming soon)*
Required Training* by 9/30/25 for access maintenance (view schedule)	• Fabrications • EPM - Project Forecasting • Sponsored Awards & Faculty Funds: Portfolio Overview
Recommended Training* (view schedule)	• EPM - Terminology and Financial Reporting • EPM - Commitments • EPM - Transfers • Goodbye, GUS; Hello, Grand Unified System • Project Analyst in Learning Pathways for Gateway and Concur • Understanding the Common Chart of Accounts

Persona (Access to be assigned in OFC)	• Project Analyst *(named role in PGM)*
	  ○ Requires Gateway Project Analyst shell role
	  ○ Requires TOE Project Reviewer shell role
	• TOE Preparer

Reports	• GL PPM Reconciliation Report in OFC • Award Master Data Report in OFC

***Some trainings may still be in the process of being scheduled.**
For the most up to date training schedule visit the Office of Financial Training website and subscribe to the Office of Financial Training email list.

UC SANTA BARBARA
Office of Financial Training
Finance & Resource Management

Learning Pathways
Persona / Duties Matrix
Research Financial Analyst (RFA)

Job Function	Research Financial Analyst (RFA)
Required Understanding	• Post-Award Roles & Responsibilities Matrix *(coming soon)* • Common Chart of Accounts (CCOA) • Project Analyst in Learning Pathways for Gateway and Concur
Required Training* by 6/30/25 for systems access (view schedule)	• OFC Overview • PGM Overview • Introduction to Managing Sponsored and Faculty Projects in OFC • Sponsored Awards: Post Award Roles & Responsibilities • Sponsored Awards: Award Setup & Maintenance in PGM (3-part series) • Cost Transfers • Sponsored Awards: Post Award Forms and Communication • Project Analyst in Learning Pathways for Gateway and Concur • FinHub *(coming soon)*
Required Training* by 9/30/25 for access maintenance (view schedule)	• Sponsored Awards: Costing & Financial Management • Sponsored Awards: Subawards & MCAs • Sponsored Awards: Deliverables, Billing, and Cash • Sponsored Awards: Award & Project Closeout and Final Reporting • Sponsored Awards: Managing Cost Share • Sponsored Awards & Faculty Funds: Portfolio Overview • Fabrications • EPM - Project Forecasting
Recommended Training* (view schedule)	• EPM - Terminology and Financial Reporting • EPM - Commitments • EPM - Transfers • Goodbye, GUS; Hello, Grand Unified System • Project Analyst in Learning Pathways for Gateway and Concur • Understanding the Common Chart of Accounts

Persona (Access to be assigned in OFC)	• Research Financial Analyst
	• Project Analyst *(named role in PGM)*
	  ○ Requires Gateway Project Analyst shell role
	  ○ Requires TOE Project Reviewer shell role
	• TOE Preparer

Reports	• GL PPM Reconciliation Report in OFC • Award Master Data Report in OFC

***Some trainings may still be in the process of being scheduled.**
For the most up to date training schedule visit the Office of Financial Training website and subscribe to the Office of Financial Training email list.

Resources

If you're behind on reconciliation, please collaborate with your business officer to submit a PGM Resource Pool request.

For questions about any of the upcoming project conversion deadlines:

PGM Office Hours via Zoom

- Wednesdays from 3-4pm
- Thursdays from 2-3pm

Stretch break!

5 minutes

Data Warehouse & Reporting Update

Diana Antova

FinHub Governance: User Access

Existing Users

- FinHub user access will be populated based on current access to the Campus Data Warehouse
- Department access will be translated to the appropriate FRU-level access

New Users

- Continue to use the existing ServiceNow form with an added "FinHub" option
- Continue to request access to historical reports in EZ Access and Online GL using ServiceNow

FinHub Governance: Report Ownership

Identifying Report Owners

- Subject matter experts (SMEs) for the data and the ones best equipped to address questions and provide guidance

Responsibilities

- Serve as liaison between report users and the development team
- Be familiar with the reports that are out there and their purpose
- Address user questions and help facilitate modifications
- Assist report development team in testing and finalizing reports

Report Testing

- FinHub in-person labs taking place this week (4/22-4/24)
- Testing sessions covering the following topics:
  - Faculty & PI Dashboard
  - General Ledger & Operating Financials
  - UCPath Employee & Payroll
  - Accounts Payable / Procurement
- 60+ users invited to participate in testing (from both central offices and departments)
- Additional testing opportunities prior to go-live

Planning for Go-Live

- Expected go-live dates for FinHub reports:
  - OFC Financials & Payroll: July 14
  - Concur: July 21
  - Jaggaer/Gateway: August 4
- We will continue to load current fiscal year data into the campus data warehouse until FY2025 close
- Historical financial and payroll reports will become static in the data warehouse, EZ Access, Online GL, and Power BI
- New FinHub reports will include two years of summarized GL data and two years of Payroll and Job Funding data

Gateway Reminders

Jacob Godfrey

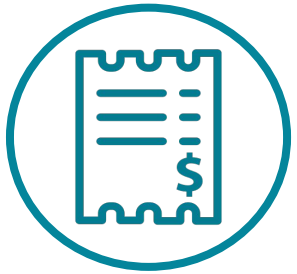
Key Areas of Change

Common Chart of Accounts (CCOA)

Roles & Role Management

Required Training

FlexCard Management



Purchase Orders

Receiving

Change Overview: Common Chart of Accounts

Both GL and Project CCOA values in Gateway

Accounting Codes

Type of CCOA	CCOA Entity	CCOA Fund	CCOA Level 7 FRU	CCOA Purpose	CCOA Program	CCOA Commitment	CCOA Activity	CCOA Project	CCOA Funding Source	CCOA Project Owning Organization	Award Type	Award End Date	Fund Type
no value Required	*no value* Required	*no value* Required	*no value* Required	*no value* Required	*no value* Required	*no value*	*no value*	*no value* Required	*no value* Required	*no value* Required	*no value*	*no value*	*no value*

Pro Tip: Have a “cheat sheet” ready for go-live

Change Overview: Roles & Role Management

- Role Security Administrator (RSA) requests roles in ServiceNow
- Roles assigned in OFC by a Central team in Business & Financial Services (BFS)
- Separation of Duties will be enforced (Preparer / Reviewer)

Change Overview: Roles & Role Management

Gateway Roles Matrix

Role	Training Required	Job Function	Shopper	Requester	Department Analyst	FRU Approver	Project Analyst	Project Manager	Receiver
Shopper	NO	Creates Carts or Requistions Assign Cart to Requester Assign Requisition to Requester	YES	YES	YES	YES	YES	YES	YES
Requester	YES	Creates Carts or Requistions Assign Cart to Requester Assign Requisition to Another Requester Submit Requisition Requistion "Preparer"	YES	YES	YES	NO	NO	YES	YES
Dept Analyst	YES	Optional Role - Serves as Secondary Requester Edit, Return, Reject, Approve Requisition Only for FRU Values Associated with this Role Doesn't work for "projects"	YES	YES	YES	NO	NO	NO	YES
FRU Approver	YES	Authorizes Commitment of Fund for Assigned GL FRU Values Return, Reject, and Approve Requisition Can be Assigned by Dollar Range "Reviewer"	YES	NO	NO	YES	YES	YES	YES
Project Analyst	YES	Must be Assigned in PGM Authorizes Commitment of Fund for Assigned Project Values Return, Reject, and Approve Requisition Approves all invoices, or only invoices $5000 or greater (as determined by Requester)	YES	NO	NO	YES	YES	YES	YES

Change Overview: Training

- **REQUIRED** role-specific training (self-guided):
  - Requester
  - Receiver
  - FRU Approver
  - Project Analyst
  - Allocator
  - Department Invoice Approver
- **Available early May in the UC Learning Center (LMS)**

Change Overview: Receiving

Gateway is the system of record for all Purchase Order and FlexCard related receipts as of 7/1/25

Change Overview: Flexcard Management

- All FlexCard transactions processed in Gateway
- All card transactions will initially post to a departmental default expense account. Departments can **choose to manually allocate or match** FlexCard transactions to FlexCard authorization purchase orders.
- FlexCard Role Exams in LMS
- **Pro Tip: Every department should have a credit card for cutover.**

Important Cutover Dates:

May 23: Last day to request new or modify FlexCard

June 23: Last day transactions loaded to legacy allocation module

June 26: Last day to allocate and/or approve charges in legacy allocation module

Change Overview: Purchase Orders

Conversion

- All open POs with positive balances will be converted to new CCOA values.
- A list of POs that fail will be posted.

Active Vendor Blankets and Contracts should be updated to include anticipated expenditures for next fiscal year ASAP.

Gateway Office Hours

General Gateway and Procurement Support

Tuesdays from 9-9:30am

Gateway Invoicing Q&A

Tuesdays & Thursdays from 3-3:30pm

Equipment Management Q&A

Tuesdays from 2:30-3pm & Thursdays from 10-10:30am

FlexCard Management Q&A

Tuesdays from 2:00-2:30pm & Thursdays from 10:30-11am

Next Steps

Matt Erickson

Coming Soon: Final Departmental Readiness Survey

Open: April 28 - May 9

Time: ~ 5 minutes

Topics: Training, Readiness, Leadership & Support

Why It Matters: Your feedback improves your experience

Make Your Voice Heard!

Next Steps

Save the Date: Next FMM Town Hall!

Wednesday, May 21 from 10am-12pm in Corwin Pavilion (hybrid)
Invitation coming soon

Action Items:

- Register for any upcoming training sessions that are applicable to your role or systems used *financialtraining.ucsb.edu/trainings/training-schedule*
- **Be aware of early fiscal close deadlines and how they impact your department;** map out key activities and necessary approval time
- Add the FMM Cutover Calendar to your UCSB Google Calendar

Reminders:

- Ensure you are subscribed to the FMM mailing list and Office of Financial Training mailing list for project news and training updates

Q&A

UC SANTA BARBARA