



UC San Diego

Policy & Procedure Manual

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ACCOUNTING PROCEDURES – GENERAL

Section: 300-87 EXHIBIT 1

Effective: 07/12/2019

Supersedes: N/A New

Next Review Date: 07/12/2022

Issuance Date: 07/12/2019

Issuing Office: [Financial Analysis Office \(FAO\)](#) & [General Accounting \(GA\)](#)

SSEA REVIEW MATRIX

| Review Matrix | | |
|-----------------|-------------------------|--------------------|
| Annual Expenses | Annual Federal Billings | |
| | <15% | >15% or >\$250,000 |
| <\$500,000 | Low * | Medium |
| >\$500,000 | Medium | High |

| Maximum Approval Periods | | |
|--------------------------|-------------------------|--------------------|
| Annual Expenses | Annual Federal Billings | |
| | <15% | >15% or >\$250,000 |
| <\$500,000 | 5 years | 2-3 years |
| >\$500,000 | 2-3 years | 1-2 Years ** |

| Review Requirements | |
|---------------------|--|
| Risk | Review(s) |
| Low * | Functional Review w/Compliance Supplement |
| Medium | Functional w/Compliance Supp. & Financial Review |
| High | Functional, Financial, and Compliance Review |

* This category includes rate modifications within budget planning guidelines for activities in compliance.

** 2 year approvals may be granted to high risk activities that meet compliance standards