

## Table of Contents

▶ BUDGETARY ADMINISTRATION & OPERATIONS.....	1
▶ POLICY STATION.....	1
▶ FISCAL CHECKLIST & DEADLINES.....	2-5
▶ TAX TIDBITS.....	5
▶ TRAINING TABLE.....	6
▶ SPOTLIGHT FEATURE.....	7
▶ UPCOMING ISSUE.....	8

○ VOLUME 5 ○ ISSUE 1 ○ January 2017

# Spotlight

**“THE SPOTLIGHT PUBLICATION SERVES TO EDUCATE, TO INFORM, TO PROVIDE RESOURCES, AND EMPOWER INDIANA UNIVERSITY BLOOMINGTON EMPLOYEES.”**

## BUDGETARY ADMINISTRATION & OPERATIONS (BAO)

### Campus Administrative Training Series (CATS)

Knowledge Base activity of the month:

[Accountable Mail](#)

Policy that supports this activity:

[Processing Revenue, FIN-TRE-VI-120](#)

Please go to the [accountable mail link](#) for more information on this activity.

Questions, comments, concerns? Send us a message through the [Sounding Board](#).

*We'd like to hear from you.*

## POLICY STATION

To further your knowledge on IU policies we encourage you to view the [University Policies web site](#).

See the [What's New](#) tab on the website for policies Under Review.

For questions/comments about the policy process, please contact the [Office of Policy Administration](#).

## FISCAL CHECKLIST & DEADLINES

### Bursar – Third Party Contract (TPC)

#### Fee Remissions - SPRING 2017

Academic Year 2016-2017	Date
Bursar Bill Runs	Third Thursday of each month
Due Date	Tenth day of each month
BEX file upload deadline - noon	Third Tuesday of each month
Spring 2017 classes begin	1.9.2017
Summer Fee Remission processing - tentative:	
TPC lists distributed	3.17.17
Deadline for entry to ensure credit on summer bill	4.14.17
April bill (1st bill of term for Summer 2017)	4.20.17
IU Department TPC Request page turned off for the <b>2016-2017 Academic Year</b>	6.16.2017

\*Dates are subject to change.

**Bursar Notes:** The cutoff for sending files of charges/credits to student accounts through BEX or any means is noon on Tuesday prior to the bill run (third Thursday of the month). This will ensure sufficient for bursar review and application to accounts prior to the bill run.

***TPC training for new users and those who want a refresher is held the second Tuesday of each month.***

***If you have any questions, contact the Bursar [bursar@indiana.edu](mailto:bursar@indiana.edu) or call 812-855-2636.***

### Two-Step Login Required for Staff, Faculty and Students

**Starting February 2, 2017**, all IU employees and affiliates (including retirees, non-paid faculty and student employees) will be required to use [Two-Step Login](#) for all CAS login.

→ View the [Two-Step Login Update](#), a CATS Presentation (January 18, 2017) for details.

→ Check out this link to schedule a face to face DUO authenticating *support*:

<https://itnews.iu.edu/events/face-to-face-support-for-two-step-login.php>

## FISCAL CHECKLIST & DEADLINES *(continued)*

### A-21 Effort Reports: Salary Transfer Deadline for Fall Period FY2017 - 15 day Notice

**15-Day REMINDER:** All Fall FY2017 Salary Transfers, regardless of account type, must be fully routed by January 31, 2017 to prevent cancellation of the documents. If you generate a Salary Transfer in these next few days, be sure to notify everyone in the routing to be sure the document finalizes.

#### Fall Periods

Report	Issue Date	Approval Deadline
Monthly 12-Pay (M01 – 7/1 to 12/31)	February 17th	April 18th
Academic 10-Pay (A01 – 8/1 to 12/31)	February 17th	April 18th
*Biweekly (B01– 7/1 to 12/31)	February 17th	April 18th

For those who have Federal and Federal Pass Through Sponsored Awards, Effort Certification documents will be generated on February 17, 2017 and the deadline for approval of these documents will be April 18, 2017.

- Double check all Fall Effort (July – Dec 2016)
- NIH Salary Cap Limits
- Be aware of any fiscal officer(s) or principle investigator(s) that are no longer with I.U., but are in award account routing.

Additional information regarding Effort Certification document approval in the Kuali Financial System can be found at: [ORA Effort Certification](#)

*IU Policy and Federal Regulations governing the administration of federal funds require that salary charges to grants and contracts be verified (which is accomplished through the effort certification document). For salary charges on federal awards that are not certified within the 60-day time period, the salaries may be deemed to be unallowable and the expenditures moved a departmental account. ORA has made several attempts to communicate this deadline to you. If an extension of time is required, please submit your request in the manner outlined in IU policy [SPA-11-004](#).*

*Please contact [Rayna Amerine](#) if you have any questions.  
Refer to the KFS [Guidance for Document Routing and Approval](#)  
and check out the [Effort Certification website](#) for more information.*

## FISCAL CHECKLIST & DEADLINES *(continued)*

### Office of Student Financial Assistance (OSFA) Important Dates & Deadlines

#### Fall IUIE Departmental Authorization Failure Report

Please be sure to run the IUIE Authorization Failure Report for the Fall 2016 semester if you are posting new awards or making changes to existing awards. For instructions on running this report, please refer to the Departmental Authorization Failure section of the Department Scholarships Manual (under Documents on the OSFA Scholarship Processing Intranet).

*Sign up on our [Scholarship SharePoint Site](#).  
Questions? Please send an email to [deptsch@indiana.edu](mailto:deptsch@indiana.edu).*

### Survey Monkey Subscriptions

**IU is no longer renewing Survey Monkey subscriptions.** We do not have an agreement in place with them and we are asking everyone to move over to our enterprise license with Qualtrics. They have been vetted and approved to access/store/transmit IU restricted and critical data. It can be purchased through IUWare at: <https://iuware.iu.edu/Windows>

If you are currently operating under an existing Survey Monkey subscription, you may continue through the remainder of your subscription term. However, you need to be aware that "Survey Monkey is not vetted to store/access/transmit IU data that is classified as "restricted" and/or "critical" as defined here: <https://datamgmt.iu.edu/types-of-data/classifications.php>

Please shut down any automatic renewals of your Survey Monkey License **as soon as possible** to avoid non-compliance with Purchasing guidelines.

**Reminder:** any software purchases you are planning to transact with your p-card should be approved PRIOR to purchase of a new software or renewal of existing software.

*If you have questions, please contact  
Tally Thrasher (Purchasing) directly at [tthrashe@iu.edu](mailto:tthrashe@iu.edu).*

### On behalf of the Kual Enterprise Dashboard Implementation Team

We are pleased to announce that a short instructional video about how to use the Kual Enterprise Dashboard (KED) is now available on the [KED Frequently Asked Questions page](#).

Visit the page to watch the video and find answers to other questions you may have about the KED.

*For questions, comments send a message through the [FMS Support Form](#).*

## FISCAL CHECKLIST & DEADLINES *(continued)*

### Payroll - New HRMS Links for the Payroll WorkCenter

**New Links for Payroll Processors!** You can find the new **Payroll WorkCenter** by going to One.iu and searching for "Payroll". You have access to the same links but they are displayed on the left side of the page. Please add this page to your favorites and begin using these links to process payroll vouchers and adjustment vouchers. If you have questions, please contact your FMS Payroll processor.

The current **HRMS:Payroll** page will be retired in early 2017 as part of the OneStart retirement.

## TAX TIDBIT

### Individual Tax Identification Number – ITIN

#### Important **changes** relating to Individual Tax Identification Number – ITIN

Do you pay international vendors or give awards to international students? Be aware that beginning January 1, 2017 some ITIN's may no longer be valid. Please make your vendors and/or students aware of the following important change.

All ITINs not used on a federal tax return at least once in the last three years will no longer be valid for use on a tax return as of Jan. 1, 2017. Additionally, all ITINs issued before 2013 will begin expiring this year, starting with those with middle digits of 78 and 79 (Example: (9XX-78-XXXX)). All expired ITINs must be renewed before being used on a U.S. tax return. No action is needed by ITIN holders who don't need to file a tax return next year. Also, there are new documentation requirements when applying for or renewing an ITIN for certain dependents. Find more information in the [ITIN Expiration Frequently Asked Questions](#)

#### Year End Tax Statements

University Tax Services provides a "[Tax Form Forecast](#)" on its' webpage. A detailed listing of forms issued by the University, along with an estimated delivery date, is available on-line. This listing will be updated with current estimated dates as the tax season progresses.

*For assistance, please contact [University Tax Services' NRA Specialists](#)  
[JoAnn Clune](#) or [Tonya Pottorff](#).*

# TRAINING

**Please note:** Training dates and information might change over time. Contact the responsible unit or contact person to be informed of the current status for a specific item.

## Campus Administrative Training Series (CATS)

**Friday, February 17**

1:30pm – 3:30pm ~ Frangipani Rm, IMU  
For additional dates and topics please visit the [CATS web site](#).

## Disbursement Voucher Certificate

➤ [Disbursement Voucher Basics](#)

**Wednesday, February 8**

9:00am – 12:00pm ~ Poplars W183

➤ [Disbursement Voucher Special Considerations](#)

**Thursday, February 9**

9:00am – 12:00pm ~ Poplars W183

See the [FMS Disbursement Voucher Certification](#) link for information on the current requirements. Questions? Please contact [FMS Training](#).

## Travel

➤ [Basic Travel Expense Module \(TEM\)](#)

This class requires DUO authentication!

**Tuesday, February 21**

9:00am – 11:30am ~ Poplars W183

For additional information please contact [Donna Burkhardt](#). Also, see [Travel Video Tutorials](#).

## Office of the Treasurer

➤ [Face to Face Revenue Training](#)

**Tuesday, March 7**

1:00pm – 3:30pm ~ Dogwood Room, IMU

All full-time employees involved in **revenue processing** or with access to University banking/payment card systems **must attend a face to face revenue training every 2 years**.

Please email [Melissa Hartley](#) for more information or call 812-855-2930.

## FERPA Training

➤ [FERPA for Staff](#)

Questions? Contact the Office of the Registrar at [registrar@indiana.edu](mailto:registrar@indiana.edu) or call (812) 855-9349.

## FMS Payroll

➤ [Kuali Time for Supervisors and Payroll Processors](#)

**Wednesday, February 22**

9:30am – 11:45pm ~ Poplars W183

Required class for new payroll processors. Must complete before attending the required Payroll Essentials class.

➤ [Payroll Essentials](#)

**Thursday, February 23**

9:00am – 12:00pm ~ Poplars W183

For additional information, contact [FMS Training](#).

## KFS Purchasing

➤ [KFS Purchasing Training - Basics](#)

**Wednesday, January 25**

9:00am – 11:00am ~ Poplars W183

KFS Purchasing Training – Basics **Webinar – New!**

**Tuesday, February 7**

9:00am – 11:00am

**Wednesday, February 15**

9:00am – 11:00am ~ Poplars W183

For additional information, contact [Donna Burkhardt](#).

## Fee Remission Third Party Contract (TPC)

Training for new users is offered on the **2<sup>nd</sup> Tuesday of each month at 12 noon**.

To schedule a training session, please send an email to [bursar@indiana.edu](mailto:bursar@indiana.edu).

## OSFA

➤ Departmental User Refresher Training

Send an email to [deptsch@indiana.edu](mailto:deptsch@indiana.edu) to find out training dates/times.

**Organizational Development Classes** are online and available for registration. Contact Wendy Cornwell at [wcornwel@iu.edu](mailto:wcornwel@iu.edu) or 855-9674 with any questions.

### THE OFFICE OF POLICY ADMINISTRATION

#### **Indiana University Policies**

IU's University-level policies have a home at [policies.iu.edu](http://policies.iu.edu) and there have been more than 1.3 million page views on the site since it was launched in 2012. The Office of Policy Administration administers the website and the process of reviewing, revising and posting University policies. The policies office is part of the Office of the Executive VP for University Academic Affairs and works closely with University compliance, internal audit, and enterprise risk management to promote compliance with policies. The policies website lets you search by policy name, category or keywords and lets you see the most-viewed policies. You can look at which policies are under review or have been recently revised. There is even a "policy on policies," [UA-08](#). Visitors to the site have a place to provide feedback on a policy or ask a question. The policies office will direct your email to the right place.

The policies office also coordinates the Policy Advisory Council (PAC) which meets quarterly to review and distribute new or revised policies, and to discuss improvements to the policy development process. PAC membership includes representatives from each of Indiana University's campuses, as well as the offices of IU's vice presidents. Membership and meeting schedules are posted on the policies site.

For any questions please contact the Chief Policy Officer, **Jenny Kincaid** at [jenkinca@iu.edu](mailto:jenkinca@iu.edu) or the general mailbox at [policies@iu.edu](mailto:policies@iu.edu).



## Upcoming Spotlight issue...

Our next *Spotlight* issue is coming in **March 2017** and will include:

- Current sections
- And much more...

**Do you know anybody who should be receiving this publication? Please send an email to [cats@indiana.edu](mailto:cats@indiana.edu) to be added.**



**IU Art Museum Sculpture**  
Photo by Indiana University  
[Inside IU Bloomington](#)

**Disclaimer:** Please note that any information and commensurate dates that appear in this publication are only current as of the date of publication and may change over time. Hence, please contact the responsible unit or contact person to be informed of the current status for a specific item.

## *Spotlight*

**Vol. 5, Issue 1**  
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The *Spotlight* is a publication designed to **Educate**, **Inform**, and provide **Resources** to **Empower** Indiana University Bloomington employees.

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