

## Table of Contents

▶ BUDGETARY ADMINISTRATION & OPERATIONS.....	1
▶ POLICY STATION.....	1
▶ FISCAL CHECKLIST & DEADLINES.....	2-4
▶ TAX TIDBITS.....	4
▶ INTERCONNECTED.....	5-6
▶ TRAINING TABLE.....	7
▶ SPOTLIGHT FEATURE.....	8

○ VOLUME 5 ○ ISSUE 3 ○ April 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

#### [Payroll - Adjustment Vouchers](#)

Policy that supports this activity: *various (see activity)*

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

### Travel and Motor Pool Charges Statement

Reconciliation of Motor Pool trips by Travel Management Services met with an unforeseen delay, which is being reconciled this week. Fiscal Officers should not be surprised to see a batch of past motor pool trips hit their statements this month. Trips that included the date of March 13th (change to Daylight Savings Time) may not hit their statements until May, after a patch is implemented.

*Questions? Please contact [Julia Bauters](#) or [Tammy Bean](#).*

## 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

### Payroll: Fiscal Approver's Report

Only Fiscal Approvers as designated on the Org table in KFS receive emails after payroll closing with a direct link to the output. If you need to run the report for the fiscal approver, you will need to use the datagroup in the Departmental Reports – Payroll Reports folder in the IUIE.

**You can only run this version IF YOU ARE the Fiscal Approver of the Org in KFS** (you should have received an email with the link):

Master Catalog > Departmental Reporting > Payroll Reports-Departmental > **Fiscal Approvers' Voucher Audit Report**

- Enter the **Pay Run ID** and click **Run**
- If this query is not successful, please use the datagroup method below

**IF YOU ARE NOT the Fiscal Approver of the Org in KFS:**

Master Catalog > Departmental Reporting > Payroll Reports-Departmental > **Fiscal Approvers/Officer Voucher Report Datagroup**

- Enter the **Pay Run ID** and the **Fiscal Approver Network ID** (leave all other selections blank)
- **Select Columns to Include:** click "All Columns"
- **Maximum Number of Rows to Return:** click "No Limit"
- **Select the Output Format:** click "MS Excel"
- **Click Run**

*If you have questions, please contact your [FMS Payroll Processor](#).*

### Payroll: Notice for Updated NIH Salary Limitation

A notice has been issued (Release Date: March 17, 2017) regarding the Executive Level II salary limitation increasing from the 2016 level of \$185,100 to **\$187,000 effective January 8, 2017**. **Please use the pending updated level for proposal budgeting purposes.**

For awards issued in those years that were restricted to Executive Level II (see [Salary Cap Summary, FY 1990 – FY 2016](#)), including competing awards already issued in FY2017, if adequate funds are available in active awards, and if the salary cap increase is consistent with the institutional base salary, grantees may rebudget to accommodate the current Executive Level II salary level. However, no additional funds will be provided to these grant awards.

The NIH has not received a FY2017 Appropriation and is currently working under a Continuing Resolution. Once the Department of Health and Human Services Appropriation for FY 2017 is enacted, NIH will publish the annual Notice of legislative mandates to provide information on any statutory provisions that limit the use of NIH grant funds in FY 2017. Additional guidance on the salary cap will also be provided at that time.

NIH Notices as they relate to continued operations under a Continuing Resolution and the applicability of the NIH Salary Limitation:

- NIH Operates Under a Continuing Resolution – [NOT-OD-17-048](#)
- Interim Guidance on Salary Limitation for Grants and Cooperative Agreements – [NOT-OD-17-049](#)

The Office of Research Administration will update the [web page](#) as soon as the appropriation is confirmed.

*If you have questions, please contact [Tim Burris](#).*

## FISCAL CHECKLIST & DEADLINES *(continued)*

### Bursar – Third Party Contract (TPC)

Task	Date
April bill (1st bill of term for Summer 2017)	4.20.16, <b>due 5.10.17</b>
1st day for summer financial aid disbursement (if all eligibility tests passed).	4.29.17
IU Department TPC Request page turned off for the 2016-17 Academic Year.	6.16.2017

**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 time 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 2nd Tuesday of each month. If you have any questions, contact the Bursar [bursar@indiana.edu](mailto:bursar@indiana.edu) or call 812-855-2636.***

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

As a reminder, for information on how to pay a student, please review the Student Payment Guidelines document on the [CATS website](#).

Department Authorization Failure Report	Now   Run Spring 2017
Scholarship/Fellowship Entry Deadline for AY 2016-2017	April 24, 2017

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

### A-21 Effort Reports

Information regarding effort certification document routing and approval in the Kuali Financial System (KFS) can be found at the following link: [Effort Certification - Guidance for Document Routing and Approval](#).

***NOTE:** 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. The Office of Research Administration (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. Always refer to the KFS [Guidance for Document Routing and Approval](#) Check out the [Effort Certification website](#) for more information.*

## FISCAL CHECKLIST & DEADLINES *(continued)*

### Travel@IU Retirement

As the functionality in the **Travel Expense Module (TEM)** has progressed, it is time to plan for the retirement of Travel@IU. This will be accomplished in **two stages**. The first stage is to disable the ability to create new trips in Travel@IU and the second stage is the complete shutdown of the Travel@IU system. Once Travel@IU is retired, you will no longer be able to access trips in this system. Access to Travel@IU data will be available via IUIE Reports.

Here are the details including dates:

1. No new trip initiation after 4/1/2017 (submitted trips in the future will still be processed and available for viewing until 6/30/17);
2. **Complete shutdown of Travel@IU on 7/1/2017.**

For example,

- if you initiate and submit an authorization in Travel@IU on or before 3/31/2017 for a trip occurring on or before 6/31/2017, the reimbursement for this trip will be processed in Travel@IU;
- if you submit an authorization on or before 3/31/2017 for a trip occurring on 7/1/2017 or after, you will need to recreate this trip in TEM as the reimbursement will not be able to be processed in Travel@IU.

We would encourage everyone to start using TEM if you haven't already. Please let us know if you have any questions. As always, we will keep you informed of pertinent updates in Travel. For **training** resources, you can go to: <http://www.indiana.edu/~travel/tem/tem.shtml#training>

*Please direct any questions to [travelbl@indiana.edu](mailto:travelbl@indiana.edu) or call 812-855-2873.*

## TAX TIDBIT

### New TSOP (Tax Standard Operating Procedure)

**New TSOP (Tax Standard Operating Procedure) to help you calculate tax on Fringe Benefits:**

University Tax Services has created a new TSOP! Employees, who receive a non-cash fringe benefit, can calculate the estimated impact of the additional taxable income to their paycheck using the paycheck modeler. See TSOP 3.05 – Tax Withholding for Fringe Benefits under Payroll Tax. See <https://fms.iu.edu/tax/standard-operating-procedures/>

Check out our website for all other TSOP's we currently have. Tax keeps all the TSOP's updated on our website and will continue to add more as topics arise.

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

## INTERCONNECTED

### CrimsonCard has arrived!

*You can now get your hands on IU's new official photo ID for all campuses.*

CrimsonCards are now available for all IU faculty, staff, and students on all eight IU campuses. [Get your hands on one of these beauties](#) at your local [CrimsonCard office location](#).

With CrimsonCard, you can:

- print
- get into authorized buildings like dorms and offices
- check out materials from the library
- access your campus meal plan
- and more!

It also works like a debit card across campus and at participating off-campus retailers. CrimsonCard will replace all existing campus cards by fall 2018, so make sure you get yours!

*Questions about CrimsonCard? Visit the website: [crimsoncard.iu.edu](http://crimsoncard.iu.edu)*

### Travel Newsletter

Please see [Travel Management Newsletter – Special Edition](#) containing important updates. The following topics are covered in the newsletter:

- Travel@IU Retirement
- Automatic Trip Reimbursement
- Single Use Account Information
- Group Travel
- Travel Advances
- TEM Profile – Name Updates
- Non-Employee Travel

*Questions about the Travel Newsletter? Visit [Travel Management Services](#) website.*

### FMS - KED Survey

The Quali Enterprise Dashboard (KED) implementation team is collecting feedback from users about the usefulness of the combined Quali Financials/Quali Coeus dashboard and the anticipated impact of dashboard favorites.

Go to **go . iu . edu / 1v1X** (remove the spaces) to start the five-question survey. The survey will take less than five minutes of your time and must be completed before April 30.

Your feedback is appreciated and will help inform our decisions as we move forward.

*Questions? Contact [Ellsabeth Mason](#).*

## INTERCONNECTED *(continued)*

### FMS - Capital Asset Management offering Capital Asset Requisition Training

[Capital Asset Management is offering Capital Asset Requisition Training](#). Attendees of this class will learn how to correctly fill out the capital asset tab of the requisition, which is required when purchasing capital equipment with a cost of \$5,000 or more. Even if you are familiar with the capital asset tab, this class is recommended for learning tips and tricks that will help you fill out this tab more accurately and efficiently.

The class is being offered on both the Bloomington and IUPUI campuses for the dates and times listed below. *If you are interested in attending, copy and paste the following URL into your browser and remove the space after the colon:* <https://cust.fms.iu.edu/cgi-bin/train/catalog/view?area=KFS>  
Financials

Then click on Capital Asset Requisition Training link and click the Register button to register for your preferred session. There is limited space available for this training session, so please register ASAP if interested! After all spots are filled, your name will be placed on a waiting list.

#### IUPUI

Wednesday, April 19, 2017  
Lockefield Village Room 3301  
10:00 a.m. – 11:30 a.m. AND 1:00 p.m. – 2:30 p.m.

#### BLOOMINGTON

Tuesday, April 25, 2017  
10:00 a.m. – 11:30 a.m.  
Poplars Room W183

*Questions about training? Please contact [Joy Maddox](#).*

### FMS - New Online Training

I am pleased to announce that, beginning this spring, FMS will expand the modality for some of our financial training courses to include online webinars. To that end, we will offer the following training online one month and in-person on the Bloomington campus the next month: **Financial Processing Basics 1, Financial Processing Basics 2, and Financial Reports**.

The online webinars will be offered through Zoom, IU's web collaboration tool. The online training will use the same materials, and will include the same examples and practice activities, that we use in the in-person training.

We will continue to offer Disbursement Voucher Basics and Disbursement Voucher Special Considerations as a monthly simulcast, with participants joining both in-person and online.

To sign up for an in-person or online training, visit <http://fms.iu.edu/training> (remove the spaces) and select "Course Catalogs" from the left navigation. Then, choose the "KFS Financials" link from the "Bloomington and Regional Campuses" column.

Please feel free to contact me or my colleagues on the FMS training team with any questions or concerns you may have.

*Questions? Contact [Elisabeth Mason](#).*

# 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)

**Monday, April 24**

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

## Disbursement Voucher Certificate

➤ [Disbursement Voucher Basics](#)

**Tuesday, May 9**

9:00am – 12:00pm ~ Poplars W183

➤ [Disbursement Voucher Special Considerations](#)

**Thursday, May 11**

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 \(TEM\)](#)

(Simulcast & DUO authentication)

**AND**

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

(Classroom & DUO authentication)

**Wednesday, April 26**

9:00am – 11:30am ~ Poplars W183

For additional information please contact [Donna Burkhardt](#). See [Travel on Demand \(TODD\)](#) for more training docs.

## Office of the Treasurer

➤ [Face to Face Revenue Training](#)

**Monday, April 24 AND**

**Wednesday, May 17**

9:30am – 12:00pm ~ 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.

## FMS Payroll

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

**Tuesday, May 16**

2:00pm – 4:00pm ~ Poplars W183

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

➤ [Payroll Essentials](#)

**Thursday, April 20**

9:00am – 12:00pm ~ Poplars W183

**Thursday, May 18**

1:30 – 4:30pm ~ Poplars W183

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

## KFS Purchasing

➤ [KFS Purchasing Training - Basics](#)

**Wednesday, May 17**

9:00am – 11:00am ~ Poplars W183

**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.

## 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.

[Organizational Development Classes](#) are online and available for registration. See new [Legal Compliance online topics](#) course! Contact Wendy Cornwell at [wcornwel@iu.edu](mailto:wcornwel@iu.edu) or 855-9674 with any questions.

### ABOUT THE OFFICE OF STUDENT FINANCIAL ASSISTANCE (OSFA)

The **Office of Student Financial Assistance (OSFA)** is responsible for the administration of federal, state and institutional financial aid for Indiana University Bloomington students. The office awards and monitors student financial aid in compliance with federal, state and institutional regulations and policies. The office also collaborates with other Enrollment Management offices and the Bursar to support directives, plans and strategic enrollment goals for the institution.

**OSFA** reports to the Office of Enrollment Management. The team consists of twenty full-time staff members who strive to educate students regarding financial aid opportunities and the impact of financing a college education on their future. **OSFA** continually looks for ways to improve the quality of the financial aid experience for students and their parents, as well as University colleagues and others who act as their partners in the delivery of financial aid.

#### What does OSFA do?

- Award scholarships, grants, loans and federal work-study funds to eligible entering and continuing students.
- Offer trainings and workshops to colleagues across campus regarding the financial aid process and how to post awards.
- Offer student loan repayment workshops to graduating seniors.
- Develop and deliver Financial Aid presentations to entering and continuing students.
- Verify information reported by students and parents on their Free Application for Federal Student Aid (FAFSA) is accurate.
- Maintain compliance with state and federal financial aid regulations.

#### Facts

- Over \$500 million in aid per year is awarded to students
- Over 55,000 FAFSAs have been received for the 2017-18 year
- 74% of IUB degree-seeking undergraduates receive some type of financial aid
- 81% of IUB degree-seeking graduate students receive some type of financial aid

#### Senior Staff

Jacqueline Kennedy- Fletcher, **Director** ([jacfletc@indiana.edu](mailto:jacfletc@indiana.edu))

Melissa Myers, Sr. Associate Director, Operations and Systems Support ([myersm@indiana.edu](mailto:myersm@indiana.edu))

Samaria Warsaw, Associate Director, Scholarships and Grants ([santhomp@indiana.edu](mailto:santhomp@indiana.edu))

Amy Hull, Associate Director, Appeals and Outreach ([amyhull@indiana.edu](mailto:amyhull@indiana.edu))

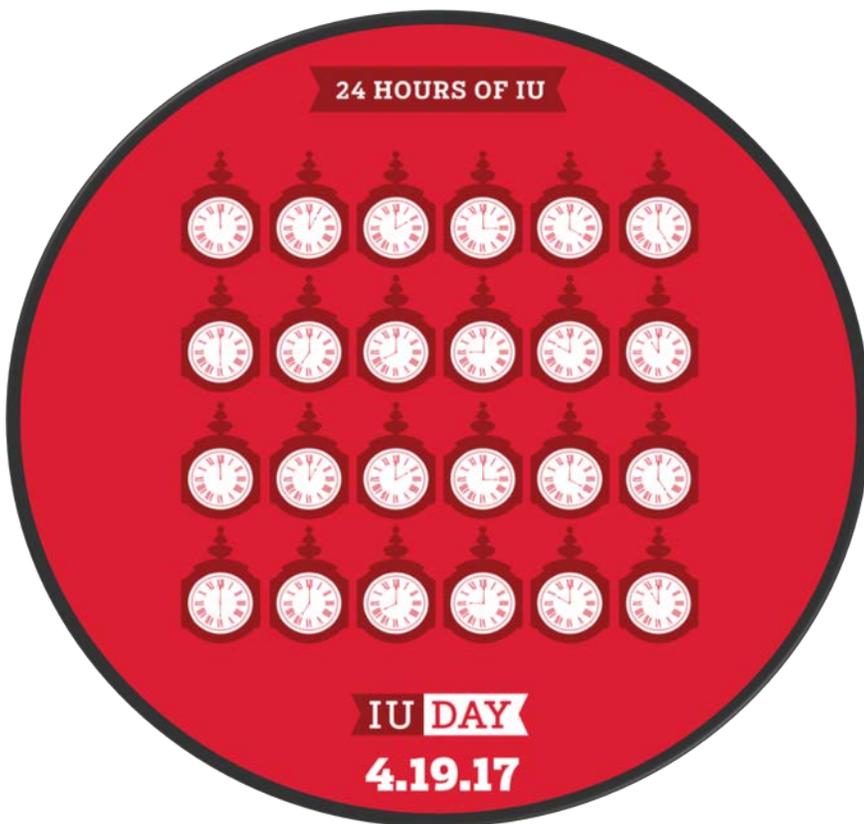
Michael Stephens, Associate Director, Verification and Processing Support ([stephemg@indiana.edu](mailto:stephemg@indiana.edu))

## Upcoming Spotlight issue...

Our next *Spotlight* issue is coming in **May 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.**



**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 3

April 2017

**Indiana University  
Bloomington, IN**

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

### Contact Information:

[Rozzie Gerstman](mailto:Rozzie.Gerstman@iu.edu)

Budgetary Administration  
& Operations (BAO)

### Contributors:

T. Michael Ford

Patti Quimby

Nancy Vázquez-Soto (editor)

### Special Thanks to:

Rayna Amerine

Tim Burris

JoAnn Clune

Jacqueline Kennedy- Fletcher

Kimberley Kercheval

Joy Maddox

Elisabeth Mason

Sandy McElhinney

Tonya Pottorff

Samaria Warsaw