

Table of Contents

▶ BUDGETARY ADMINISTRATION & OPERATIONS.....	1
▶ POLICY STATION.....	1
▶ FISCAL CHECKLIST & DEADLINES.....	2-6
▶ TAX TIDBIT.....	7
▶ TRAINING.....	8

○ VOLUME 6 ○ ISSUE 2 ○ February 2018

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

Knowledge Base financial activity of the month: [Background Check Charges](#).

Policies that supports this activity: [Background Checks, HR-02-10](#) and [Programs Involving Children, PS-01](#).

Questions, comments, concerns? Send us a message through the CATS website's [Sounding Board](#) and make sure to add your name and email address if you'd like to be reached.

POLICY STATION

[University Policies – Financial](#)

These policies have been recently updated:

- [Hospitality Expenditures, FIN-ACC-50](#) – Previously called “Allowable Hospitality Expenses”. Details the types of hospitality expenses incurred while conducting university business that may be approved or reimbursed to IU faculty and staff.
- [Moving Expenses, FIN-ACC-310](#) – Last updated on January 18, 2018. Currently under revision due to changes in tax law. Provides a means of paying for, or reimbursing, moving expenses incurred by new employees that are full-time staff or faculty members.

If you have any inquiries, please consult with the policy contact or send a message to the [Office of Policy Administration](#).

View the “New and Recently Revised” as well as the “Under Review” tabs on the website to keep yourself abreast with University policies.

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

FISCAL CHECKLIST & DEADLINES

Purchasing: Hospitality Requisitions

To: Executive Managers,
Account Supervisors,
Account Managers,
Fiscal Officers,

Effective immediately, Purchasing will no longer be auditing hospitality requisitions for compliance (hospitality forms & approval codes) with the Hospitality Policy.

Hospitality requisitions that route to purchasing will be processed with or without hospitality approval documentation. The expectation is that beginning Feb. 5th hospitality documentation for the business purpose and attendee lists will be reviewed, approved and retained by the appropriate person responsible for compliance with the hospitality policy for that particular Responsibility Center/campus.

The ability to attach hospitality documentation to requisitions and purchase orders for internal audit purposes will not be affected as we consider requisitions and purchase orders to be the best repository for these types of documents.

Compliance procedures for managing, reviewing, approving and retaining documentation for hospitality orders are governed by three policies:

- [Hospitality Purchasing](#)
- [Hospitality Expenditures, FIN-ACC-50](#)
- [Role of Fiscal Officer, Account Manager and Account Supervisor, FIN-ACC-1](#)

Note: Purchasing will continue to monitor and manage all orders with contracts. Purchasing is not delegating signature authority on hotel or catering contracts. If a contract needs reviewed and signed, please attach it to the requisition and check the restricted box next to the line item for routing to Purchasing.

If you have further questions, please send an email to [Debbie Richards](#).

FISCAL CHECKLIST & DEADLINES *(continued)*

Human Resources: February 2018 E-doc Deadlines

After reviewing the FMS cut-off dates for the February 2018 [Payroll Calendar](#), HR Transaction Services team wants to communicate the following deadlines for Temporary and Staff related electronic eDocs and staff separations paper adjustment vouchers. Please see [HRMS E-Doc and Payroll Adjustment Voucher Deadlines](#) website for upcoming notices. Please contact [Emily Kirkman](#) directly if questions arise about this notice.

For the biweekly pay period ending February 24th-- All biweekly-paid Temporary and Staff eDocs should be received in the Campus HR Action List by February 25th. This will enable final approvers to meet the payroll deadline of February 28th. This applies for any activity that needs to be reflected on the March 9th paycheck.

For the monthly pay period ending February 28th-- All monthly-paid Staff eDocs should be received in the Campus HR action list by February 15th. This will enable final approvers to meet the payroll deadline of February 19th. This applies for any activity that needs to be reflected on the February 28th paycheck.

General eDoc Information:

- The eDoc "Error Job092" warning message indicates to contact IU HR. Please email hredocs@iu.edu for staff or temporary employees at the IUBLA or IUINA campus.
- Please contact your regional Campus HR office for staff or temporary employees located at a regional campus. For academic employees please contact your campus academic records office.

*Questions or do you need assistance related to staff or temporary related eDocs?
Please email hredocs@iu.edu to reach an IU HR Transaction Services team member.*

Questions or assistance specifically related to staff term eDocs, separation pay or the staff term paper adjustment voucher can be directed to Kayla or Emily at hredocs@iu.edu.

Payroll: MLK Holiday

Payroll has received multiple questions concerning staff that worked during the MLK holiday on January 15. The MLK holiday is considered a 'non-premium' holiday and the maximum an employee may be compensated for working is up to 16 hours (double time).

Please see processing document [PSOP 6.0: Holidays – Recording Hours Worked](#) and visit [FMS Payroll – 2018 Pay Dates](#) page and add it to your bookmarks.

If you have further questions or need direction, please send an email to askhr@iu.edu or contact your [FMS Payroll Processor](#).

FISCAL CHECKLIST & DEADLINES *(continued)*

Critical Data on KFS

Congratulations to the 2,303 KFS users who have completed the *Critical Data in KFS* training since the training went live on December 4!

The remaining 1,514 KFS users who have not yet completed the training must do so before **Monday, March 5**. All KFS users who have **not** completed the *Critical Data in KFS* training by Monday, March 5 will have their KFS access revoked. See [Critical Data in KFS Training](#) for FAQs and step-by-step instructions and information about how to enroll in the training.

If you have further questions, you may contact [Elisabeth Mason](#), FMS Training (812) 855-555.

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

Payments to Students

The [Student Payment Guidelines website](#) is intended to assist departments with determining how best to pay a student. This website is a supplement to the [Comprehensive Guide on Payments to Students](#) document which can be found on the [CATS website](#) (see Financial Aid). For additional questions, please contact deptsch@indiana.edu.

Sign Up for *New Upcoming Training Opportunities* at [Scholarship SharePoint Site](#).
Also, see Training section for upcoming dates.

Questions? Please send an email to deptsch@indiana.edu.

Update: Indiana University Fleet Services rolls out Fleet Commander 5.0

Indiana University Fleet Services is excited to announce the upcoming release of Fleet Commander Version 5.0 on Sunday, February 18th. This version will give our online reservation system a new look and feel. Basic functions of Fleet Commander will remain the same, but version 5.0 highlights new features such as:

- Mozilla Firefox, Google Chrome, and Microsoft Edge compatible
- Adjusted page widths to prevent side scrolling
- More scheduling tools to help manage vehicles
- Automated emails to remind you of your scheduled trips

With Fleet Commander 5.0 you will notice that the colors, logo, menu and other things have changed a bit...but the new version has no internal impact to IT or other IU departments. Your existing credentials will still be used to log in and make reservations.

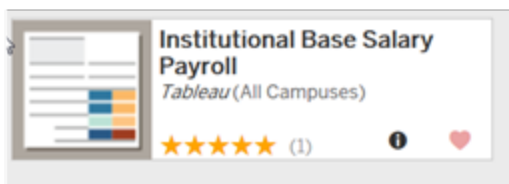
If you should have any questions, please send an email to [Motor Pool](#).

FISCAL CHECKLIST & DEADLINES *(continued)*

Fall FY2018 Effort Certifications

The Fall FY2018 Effort Certifications will generate on Monday, February 19th to be finalized by Wednesday, April 18th. The documents will route first to the Fiscal Officer(s) for each account then on to the Principal Investigator(s) with Federal or Fed pass through accounts.

The Office of Research Administration has a new reporting tool on the [Dashboard](#) that can facilitate verifying Effort.



Payroll Verification Summary | By Period | About this Report

Institutional Base Salary Payroll Summary

Beginning Fiscal Year*	Beginning Fiscal Period*	Ending Fiscal Year*	Ending Fiscal Period*	Chart	Responsibility Center	Organization	Principal Investigator	Subtotal by Employee
Select Year	Select Period	Select Year	Select Period	(All)	(All)	(All)	(All)	No

Person Name	Fiscal Officer	Account Number	Award Family	Object Code	Fund Group	Account Closed Indicator	Include Federal/Non-Federal	Sub Account Types
(All)	(All)	(All)	(All)	(All)	(All)	(All)	(All)	(All)

The Institutional Base Salary Payroll report allows searching for data by Employee, by Account Number, by Principal Investigator, or by Organization. The fiscal year* and fiscal period* fields are required.

See [Effort Certification](#) document approval in the Quali Financial System.

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 to 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 [Effort Certification Under Uniform Guidance 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)*

Capital Assets – CAMS Users

KFS had a software upgrade the weekend of **February 10-11, 2018**. With this upgrade, the Capital Asset Module had some changes that are listed below. For more information regarding the upgrade see [KFS 7.0 Upgrade](#).

1. Depreciation. For additions to existing assets, the formula for calculating depreciation uses a looking forward approach and determines depreciation based on the remaining useful life. This spreads depreciation out evenly over an asset's life taking into consideration changes in value or life. With this change, Capital Asset Management will implement the following new business practice:
 - Upgrades to assets created in a prior fiscal year may now be allowed depending on the remaining life of the asset. If you will be upgrading existing assets, please contact Capital Asset Management to see if the upgrade can be applied to the existing asset.
2. Asset Location Global. An "Update Last Inventory Date" button was added to the Asset Location Global document. During your physical inventory, you can now use the Asset Location Global document to update the Last Inventory Date for assets where the location has not changed.
3. Asset Edit. Asset Representative Principal Name field has been fixed to allow removal of data.
4. Assets on inactive organization codes. Capital assets have a long life, and on occasion, can outlive an Organization. A new route node has been created to route Retirements, Transfers, and Loans to the KFS-SYS Manager when the asset has an inactive organization code.
5. Barcode Error Document. Retired assets are now identified with a specific error message indicating the asset is retired.
6. Capital Asset Edit on Requisitions and Purchase Orders. In the Asset Location tab, you can now enter the building code without going to the lookup. Once the building number is entered, the screen will reload. If your cursor is in the building field, you will be returned to that location.
7. Create Capital Asset on Financial Documents. In the Create Asset Tab, you can now enter the vendor without going to the lookup.

If you have any questions, please send an email to contact capasset@iu.edu.

SIS Unavailable During Upgrade on Saturday, February 24th

SIS User Community: The Student Information System (SIS) environment will be unavailable to users on Saturday February 24th from 7:00 AM until approximately 11:00 AM. All services accessible from [One.IU](#) for Administrative Systems, Student Self-Service, Faculty Systems, and other systems dependent upon SIS will be unavailable. It is strongly recommended that any plans you might have for February 24th that requires the use of any of the mentioned systems during the 7:00 AM to 11:00 AM time frame be re-scheduled. Thank you for your patience through this system maintenance window.

*You can direct any questions you may have to [SIS Help Desk](#).
For issues with SIS please send a [Problem Report](#).*

TAX TIDBIT

Tax Immigration Uploader

On February 1st, 2018, Monroe County began requiring an additional 1% tax on prepared food and beverage. Currently students are **not** subject to paying sales tax on food and beverage. Students will continue to **not** be subject to any sales tax, including this additional 1% tax on food and beverage. If the person purchasing the prepared food or beverage is not a student, then they will be subject to the additional 1% tax.

Prepared food and beverage is defined as the following:

- Food sold in a heated state or is heated by the seller.
- When two or more ingredients are combined by the seller for the sale of single item. (For example: a sandwich)
- Food sold with eating utensils provided by the seller. This includes plates, knives, forks, spoons, glasses, cups, napkins, or straws. A container or package used to transport the food is not considered a plate. (For example: A fountain drink would be subject to the 1% tax because it is sold with eating utensils provided by the merchant (cup & straw). A can of coke would not be subject to the 1% tax because it is in a “package” that is used to “transport” the drink.)

Exemptions

Food that has only been cut or repackaged by the seller is not subject to the 1% tax.

Any food that requires cooking by the consumer is also not subject to the 1% tax.

Lastly, if the transaction is exempt from sales tax, then the additional 1% food and beverage tax does not apply.

Further instructions on how to remit sales tax in KFS will be following in the near future.

The official notice can be found [here](#).

For assistance, please contact [University Tax Services](mailto:taxpayer@iu.edu) at taxpayer@iu.edu.

TRAINING

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)

Wednesday, March 28 ~ 1:30-3:30pm ~ Frangipani Rm, IMU

For additional dates and topics please visit the [CATS Website](#).

FMS - Online sessions

➤ [Critical Data in KFS](#)

Available 24/7. See [eTraining](#) link.

Questions? Please contact [FMS Training](#).

Financial Reports - Online

Attendees must have both IUIE and KFS and access to participate in this training. See links for prerequisite(s).

➤ [IUIE Financial Reports](#)

Thursday, February 15 - [Zoom Meeting](#)

9:00 - 11:00am

Thursday, March 15

9:00 - 11:00am ~ Poplars W183

➤ [Intro to Financial Reports](#)

Thursday, March 8

9:00 - 10:30am

➤ [Standard Monthly Reports](#)

Friday, February 16 and Friday, March 16

9:00 - 10:15am ~ Poplars W183

Questions? Please contact [FMS Training](#).

Disbursement Voucher Certificate

Both sessions require DUO authentication.

➤ [Disbursement Voucher Basics](#)

Tuesday, February 20

9:00 - 12:00pm ~ Poplars W183

➤ [Disbursement Voucher Special Considerations](#)

Monday, March 19

9:00 - 11:00am ~ Poplars W183

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

FMS Payroll

➤ [Payroll Essentials](#)

Thursday, February 15

1:30 - 3:30pm ~ Poplars W183

Questions? Please contact [FMS Training](#).

FERPA Training

➤ [FERPA for Staff](#)

For training contact the Office of the Registrar at registrar@indiana.edu / 812-855-9349.

KFS Purchasing

Requires DUO authentication

➤ [KFS Purchasing Training - Basic](#)

Wednesday, March 14

9:00 - 11:00am ~ Poplars W183

Contact [Donna Burkhardt](#) for information.

Office of the Treasurer

➤ [Face to Face Revenue Training](#)

Intended for full-time employees involved in revenue processing & access to University banking and payment card systems. Please sign up [here](#). For questions, please contact [Melissa Hartley](#), or call 812-855-2930. See Treasury Operations [Training](#) page for other useful information.

OSFA

Upcoming Training Opportunities. Sign up [here](#).

➤ New Departmental User Training:

March 20th - 1:30pm-3:30pm ~ Persimmon Rm, IMU

March 27th - 9:30am-11:30am ~ Sassafras Rm, IMU

➤ Departmental User Refresher Training:

March 22nd - 9:30am-11:30am ~ Maple Rm, IMU

March 29th - 1:30pm-3:30pm ~ Sassafras Rm, IMU

For additional questions, please contact deptsch@indiana.edu.

Endowment Trust Accounting (ETA)

➤ ETA-Web training (IUF) - *limited seating!!*

Training offered on 2nd Tuesday of each month:

March 13 / April 10 / June 12 / July 10 / August 14

9:00 - 11:00am ~ IUF BL Office

Email iufacct@indiana.edu to sign up.

Fee Remission Third Party Contract (TPC)

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

To schedule a training session, please send an email to bursar@indiana.edu.

Organizational Development Classes are [online](#) and available for registration. Contact [Wendy Cornwell](#) or call 855-9674 with any questions.

Upcoming Spotlight issue...

Our next *Spotlight* issue is coming in **March 2018** 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 to be added.



[@iubloomington](https://twitter.com/iubloomington)

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. 6, Issue 2

February 2018

Indiana University

Bloomington, IN

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

Contact Information:

tba

Budgetary Administration
& Operations (BAO)

Contributors:

T. Michael Ford

Patti Quimby

Nancy Vázquez-Soto

Special Thanks to:

Rayna Amerine

Dona Burkhardt

Emily Kirkman

Joy Maddox

Elizabeth Mason

Sandy McElhinney

Tonya Pottorff

Cassandra Rosendburgh

Samaria Warsaw