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○ VOLUME 6 ○ ISSUE 3 ○ March 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: [Physical Inventory](#)

Policies that supports this activity: [Capital Movable Asset Physical Inventories, Tagging and Location Changes, FIN-ACC-170](#) and [CSOP 4.0 Physical Inventories](#)

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 – Human Resources](#)

Policy recently updated:

[Evaluation Periods for New, Promoted, and Transferred Employees, HR-02-60](#)

Last Updated: 3/12/2018

Reason for Policy (according to the policy): “The purpose of the evaluation period for a new, promoted, or transferred employee is to provide assurance that the employee can satisfactorily fulfill the demands of the position. It is not part of any disciplinary procedure.”

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

FMS Payroll

Tax Season and Phishing Schemes

Subject: IR-2018-8: IRS, States and Tax Industry Warn Employers to Beware of Form W-2 Scam; Tax Season Could Bring New Surge in Phishing Scheme

As we head into tax season, FMS Payroll wants to take this opportunity to remind payroll staff to be aware of potential tax-related identity theft, especially involving Forms W-2. The IRS has issued a newswire on the subject: [IRS, States and Tax Industry Warn Employers to Beware of Form W-2 Scam; Tax Season Could Bring New Surge in Phishing Scheme](#).

Please keep in mind that our executives do not request Forms W-2, and even if they do, we do not provide them. If you receive such request, please forward to phishing@iu.edu.

2018 Tax Year Information

The IRS just issued new guidance in response to the Tax Cuts and Jobs Act, and FMS Payroll have updated the tax tables in accordance with the guidance. All but the 10% bracket were reduced by 2% to 4%. As a result, most employees will experience lower federal tax withholdings under the new IRS tax table.

These are some of the new tax rates and thresholds for 2018:

- FICA maximum - \$128,400.
- Additional Medicare Surcharge – 0.9% of wages over \$200,000 (unchanged from 2017)
- Federal Supplemental rates for supplemental wages up to \$1 million - 22% (down from 25% in 2017)
- Federal Supplemental rates for supplemental wages in excess of \$1 million - 37% (down from 39.6% in 2017)
- Indiana Income Tax rate - 3.23% (unchanged from 2017)

If you want to view local tax rates in HRMS, please go to Main Menu > Set Up HCM > Product Related > Payroll for North America > Local Taxes > Tax Table. Enter the State Code IN, click Search, and then choose the county. The rates will be on the second tab, Local Tax Table2.

If you have questions or concerns about phishing schemes and/or 2018 tax information, please contact Stephen G. Miller, Director, University Payroll, 812-855-3274.

Campus Holiday - Biweekly and Biweekly Professional Staff

The Campus holiday is available for use for all staff employees as of March 1st. Biweekly and Biweekly Professional staff will indicate HTK (holiday taken) on their timesheet when the holiday hours are used. If you have any questions, please contact your Department's payroll processor.

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

FISCAL CHECKLIST & DEADLINES *(continued)*

Human Resources: Updated Process for Background Checks

Beginning March 1, 2018, Background Checks Must be Completed Prior to Employment Start Date

One of the top priorities of Talent Acquisition Rapid Redesign, supported by executive sponsorship, was to change the process for background checks. Beginning March 1, 2018, background checks for new and rehired candidates, in accordance with IU background check policy, must be successfully completed before the candidate can begin working in a staff/temporary position at the university.

Why Change?

- Enhanced security: Indiana University has a duty to provide a safe place for students, employees, and visitors at all times.
- Enhanced processes: You will no longer have to go through the burdensome process of hiring an individual and terminating them later due to background check results. This will reduce administration barriers for you and all other parties involved in the hiring and terminating processes.
- Consistency on all campuses: This process has already been in place on many of IU's campuses, but not all. This change will help ensure that there are consistent background check and hiring practices on all campuses.

What else is Changing?

- IU Human Resources will only be approving Hire eDocs once the background check has been successfully completed.

How Can I Make this Change as Seamless as Possible?

- Educate supervisors and others involved in the hiring process on why following this process is so important.
- Recruit, interview, and select candidates as early as possible to avoid hiring delays.
- Initiate the background check process as soon as possible once an offer has been accepted by the candidate.
- Encourage candidates to complete the background check as soon as possible to avoid any possible delays in their start date.

We would like to thank you for your ongoing support as we make changes that will continually improve the hiring practices and processes at the university.

For questions, please contact Human Resources at hredocs@iu.edu.

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

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.

FISCAL CHECKLIST & DEADLINES *(continued)*

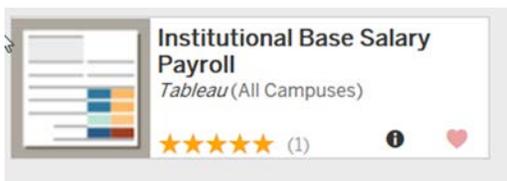
Fall FY2018 Effort Certifications

For employees whose institutional base salary is paid in part or in full from federal or federal pass-through award accounts, Effort Certification Documents (ECD) covering Fall FY2018 are routing.

Fall Periods

Report	Issue Date	Approval Deadline
Monthly 12-Pay (M01 – 7/1 to 12/31)	February 19th	April 18th
Academic 10-Pay (A01 – 8/1 to 12/31)	February 19th	April 18th
Biweekly (B01– 7/1 to 12/31)	February 19th	April 18th

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



Fiscal Officers and Principal Investigators are requested to verify the ECD is a reasonable reflection of effort across all institutional activities. To locate the Effort Certification Documents, log into One.IU with DUO Token, then access your Action Item Listing application.

Additional information concerning ECD's can be found at: [Guidance for Document Routing and Approval](#) or for tracking documents [Searching for Effort Documents in KFS](#)

Please note the approval deadline for the Fall Effort Certification Documents will be April 18, 2018 per I.U. policy; [Effort Certification Under Uniform Guidance, SPA-11-004](#)

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 [Guidance for Document Routing and Approval](#).
Check out the [Effort Certification website](#) for more information.*

FISCAL CHECKLIST & DEADLINES *(continued)*

FMS Training - AR Document View Access Request

In an effort to minimize exposure of critical data erroneously entered into the Accounts Receivable (AR) module of KFS, all AR documents will remain restricted to the initiator and invoices will continue to route for Fiscal Officer (FO) approval.

We are aware that other individuals, in addition to the document initiator and account FO, may have job functions that require access to KFS AR documents. If you are one of these individuals, your organization's FO can submit a request for access to KFS AR documents on your behalf by completing the AR Document View Access Request at [AR Document Viewer Questionnaire](#).

Each request will be reviewed within two business days. Please note, however, that merely submitting the request does not guarantee that access will be granted.

Please contact Dominique Bahr at dtbahr@iu.edu with any questions.

University Tax Services - New Tax Info Sessions

New Tax Info Sessions

University Tax Services is excited to announce a new series of tax information sessions. Each session can be attended either in person on the Bloomington campus or online via a Zoom meeting room. Online participants will see and hear the same presentation as in person participants. Below are descriptions of the sessions that will be offered this summer.

Domestic Tax

This 2 hour 15 minute interactive session will revolve around the tax implications of payments to US persons. We will discuss the Accountable Plan policy, [Reimbursement Under the Accountable Plan, FIN-ACC-620](#) and review the differences between mutual and primary benefit. Facilitators will explain how to determine whether a person should be treated as an employee or an independent contractor, as well as how to pay employees non-cash benefits and for work performed outside of Indiana. Finally, we will cover payments to students – both cash and noncash items – as well as how to determine what is a wage vs what is a scholarship and which IU payment vehicle to use, KFS, HRMS, or SIS.

International Tax

This 2 hour interactive session will focus on tax implications of non-US persons receiving payments from IU. We will discuss the Accountable Plan policy, [Reimbursement Under the Accountable Plan, FIN-ACC-620](#) and review the differences between mutual and primary benefit. Facilitators will walk through the determination process for payments made to international vendors or visitors and the required tax withholding. Next, we will discuss the payment of cash and non-cash benefits to non-US persons within and outside of the US. Finally, we will cover payments to International students and employees – both cash and noncash items – as well as how and when tax treaties are applied to taxable earnings and the process that needs to be followed.

To register for a session, visit <http://go.iu.edu/taxtrain>.

If you have any questions, please contact the FMS Training team at fmstrain@indiana.edu.

Office of International Services (OIS)**Hiring and Inviting International Employees and Visitors**

Many departments are currently in the midst of hiring employees for the 2018-2019 academic year. With that in mind, the Office of International Services (OIS) would like to remind you that now is the time to submit H-1B e-forms through iStart for incoming international employees who require H-1B status beginning July 1 or August 1, 2018. The H-1B e-form is a request for OIS to prepare and mail an application to USCIS (immigration) for an employee to be granted H-1B status for employment purposes.

The average processing time, from the time the H-1B e-form request is submitted in iStart through approval by USCIS, is roughly six months. Filing fees for the H-1B petition include a \$460 application fee and a \$500 anti-fraud fee. If an expedited request is necessary, an additional \$1225 premium processing fee payable to USCIS may be required. As hiring decisions are made in your department, the H-1B e-form should be filed through iStart as soon as possible. We have added a new resource to assist departmental contacts in the submission of the H-1B eform. On the OIS website you will find a series of videos that will provide guidance as you complete each section of the H-1B eform.

Many international faculty members, researchers, and scholars who come to Indiana University are J-1 exchange visitors participating as short-term scholars, research scholars, or professors. Exchange visitors may be paid or unpaid and may be in the US for a few days up to five years. Ideally the J-1 eform for a visiting scholar will be submitted in iStart at least three months in advance of the anticipated program start date.

If your department has made an international hire or invited a visiting scholar to IU, please contact OIS as soon as possible to discuss the specifics of the invitation including position duties or activity, salary or other payment, as well as the international applicant's qualifications and visa history. OIS will advise regarding the appropriate visa classification for the visit. We look forward to working with you this spring and throughout the year.

Please contact Joanna Snyder at snyder1@iu.edu with questions or the Office of International Services at OIS@iu.edu (812) 855.9086.

TAX TIDBIT

U.S. Taxes Are Due on April 15



All international students, scholars, and employees need to submit at least one tax form ([Form 8843](#)) by **April 15**.

If you earned any income in the U.S. during 2017, you will also need to submit [state](#) and [federal](#) tax forms. The U.S. tax code is complicated and most people use tax software or a professional tax preparation service to file each year.

Tax Preparation Software

Free software is available to you with a special access code in iStart! Thompson Reuter's Foreign National Tax Resource (FNTR - formerly known as Windstar) makes filing your taxes easy.

[Get code now](#)

Professional Tax Assistance

You can also take advantage of IU's IRS Volunteer Income Tax Assistance (VITA) Program offers free tax preparation services. Clients are served on a first-come, first-served basis and open sessions are offered each week through March 28.

[Learn about VITA](#)

OIS offers resources to learn more about your U.S. tax responsibilities, but we are not qualified to offer advice or assistance in filing your taxes.

For assistance, please send a message to 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) and for Zoom meeting instructions when apply.

➤ [IUIE Financial Reports](#)

Wednesday, April 11 (Zoom)

9:00 – 11:00am

Thursday, May 10

9:00 – 11:00am ~ Poplars W183

➤ [Intro to Financial Reports](#)

Thursday, April 5 (Zoom)

9:00 – 10:30am

Thursday, May 3

9:00 – 10:30 am ~ Poplars W183

➤ [Standard Monthly Reports](#)

Thursday, April 12 (Zoom)

9:00 – 10:00am

Friday, May 11

9:00 – 10:15am ~ Poplars W183

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

KFS Purchasing

Requires DUO authentication.

See link for details.

➤ [KFS Purchasing Training - Basic](#)

Wednesday, April 4 (online)

9:00 – 11:00am

Contact [Donna Burkhardt](#) for information.

Disbursement Voucher Certificate

Both sessions require DUO authentication.

➤ [Disbursement Voucher Basics](#)

Monday, April 16 (Zoom)

9:00 – 12:00pm

Monday, May 14

9:00 – 12:00pm ~ Poplars W183

➤ [Disbursement Voucher Special Considerations](#)

Thursday, April 19 (Zoom)

9:00 – 11:00am

Thursday, May 17

9:00 – 12:00pm ~ Poplars W183

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

Please contact [FMS Training](#).

FMS Payroll

➤ [Kuali Time for Payroll Supervisors](#)

This class is required for new payroll processors, and must be completed before attending the required Payroll Essentials class. See next.

Monday, April 16

1:30 – 3:00pm ~ Poplars W183

➤ [Payroll Essentials](#)

Thursday, April 19

1:00 – 3:00pm ~ Poplars W183

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

TRAINING *(continued)*

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.

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.

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.

Endowment Trust Accounting (ETA)

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

Training offered on 2nd Tuesday of each month:

April 10

June 12

July 10

August 14

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

Email iufacct@indiana.edu to sign up.

2018 IUB Research Administrator Team (RAT) Meeting Schedule

ALL RAT [meetings](#) are scheduled from 1:30–3pm

Wednesday, April 11 ~ Oak Room, IMU

Wednesday, July 11 ~ Location TBA

Wednesday, October 10 ~ Location TBA

View *current classes* in [Expand](#).

Questions? Please contact [Susan Whitt](#) or call 812-856-2464.

Office of Student Financial Aid (OSFA)

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

➤ [New Departmental User Training](#):

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

➤ [Departmental User Refresher Training](#):

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

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

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

FERPA Training

➤ [FERPA for Staff](#)

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

Upcoming Spotlight issue...

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



[Courtesy, The Lilly Library, Indiana University, 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.

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**Indiana University
Bloomington, IN**

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

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