• IU Foundation – CATS
• The IU Foundation would like to encourage you to start submitting your Scholarship and Award Reimbursement edocs for 2021-2022 **beginning in February 2022** to prevent a massive influx in May and June.

• To guarantee edoc approval by FYE, all Fall/Spring edocs should be submitted early enough to be routed through unit approvals and **in IUF’s action list no later than April 15, 2022**, with documentation to show donor intent compliance attached to the notes section.

• To guarantee edoc approval by FYE, all Summer edocs and Fellowship Health Fee edocs must be submitted early enough to be routed through unit approvals and **in IUF’s action list no later than June 15, 2022**, with documentation to show donor intent compliance attached to the notes section. This is a tight timeline, so we encourage you to have all donor intent compliance docs ready to go.
## IMPORTANT DATES FOR SPRING 2022 (4222)

<table>
<thead>
<tr>
<th>Event</th>
<th>Deadline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Begin submitting 2021-2022 Fall/Spring scholarship reimbursement edocs</td>
<td>2/1/2022</td>
</tr>
<tr>
<td>Fall/Spring 2021-2022 IUF Scholarship &amp; Award Reimbursement edoc should be in IUF's action list to guarantee approval by FYE</td>
<td>4/15/2022</td>
</tr>
<tr>
<td>Edoc approval cutoff for 2021-2022 (2pm)</td>
<td>6/30/2022</td>
</tr>
</tbody>
</table>

## IMPORTANT DATES FOR SUMMER 2022 (4225)

<table>
<thead>
<tr>
<th>Event</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Begin submitting Summer 2022 scholarship reimbursement edocs</td>
<td>6/1/2022</td>
</tr>
<tr>
<td>Summer 2022 IUF Scholarship &amp; Award Reimbursement edoc must be in IUF's action list to guarantee approval by FYE</td>
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</tbody>
</table>
To make future edoc searches and research easier, we ask that you use the following format for your Scholarship and Award Reimbursement edoc description.

- 03700012345_Jane Doe Scholarship_2021-2022 (or Spring 2022)

For examples of acceptable donor intent compliance documentation, please refer to the Sample Docs required for IUF edocs pdf.

Both Fall and Spring expenses can be reimbursed on one edoc for the same item type being reimbursed from one IUF account.

You can also reimburse expenses for different item types on the same edoc if the same IUF account is being used. For example, you can reimburse UGRD and GRAD expenses for the same IUF account on one edoc.

If you choose to process reimbursement edocs twice a year (after FA disbursement and after SP disbursement), you only need to attach compliance documentation to the Fall edoc. Please reference the finalized Fall edoc on the Spring reimbursement edoc.
2021-2022 Scholarship Reimbursement Financial Need Compliance docs update for BAM users only

- Financial Need
  - Must have financial need
    - Screenshot of SIS FA Need Summary for the awarding AY showing and official EFC status and a Cost of Attendance (COA) greater than Expected Family Contribution (EFC)

- New For BAM Users Only: You can attach either the student’s entire BAM application for the awarded cycle, or the applicant report. For the IUF data to be accepted to show financial need compliance, the following data is required. If any of these data points are missing, you will be asked to provide the SIS FA Need Summary screenshot.
  - BAM Cycle
  - Student Name
  - Student ID#
  - NXT EFC Status
  - NXT Total Need
Gifts to Employees or Non-Employees
Which IUF edoc do I use?

IUF ETA to IU Transfer
• IU HR Approved retirement gifts
• IU HR Approved service anniversary gifts
• Employee appreciation

Direct Vendor Payment
• IU HR Approved retirement gifts
• Bereavement flowers

Please refer to policy FIN-ACC-590
Gifts to Employees or Non-Employees

Employee Appreciation (ETA to IU transfer)

• Small ONE-TIME gifts
• $100 limit
• If multiple gifts will be given over a year, or if the total amount is $100 or more, contact University Tax Services.
Gifts to Employees or Non-Employees

Employee Goodwill

• Retirement gifts
  – IU HR Approved retirement gifts (Can be paid by IU and reimbursed, paid by staff member and reimbursed, or paid directly to a vendor)
  – Limited to $400 total per employee. E-docs are routed to the Office of the University Controller (UCO) for review and approval.

• Cannot use IU or IUF fund for personal life events.
  – Ex. Graduation, baby showers, weddings, get well, etc.
  – These are not work related. Only option is to “pass the hat”
  – Exception: IUF allows the purchase of flowers up to $150 for bereavement. If you are unsure if your flower purchase is qualified, check with IUF Compliance and Disbursement Services by emailing iufap@indiana.edu.

Please refer to policy FIN-ACC-590
Questions?

Gifts to employees or non-employees, IUF ETA to IU transfer edoc, or Direct Vendor Payment edocs questions:

Mary Jo Gries (mgries@iu.edu or 812-855-6301) or Debra Ikerd (dikerd@iu.edu or 812-855-3144)

IUF Scholarship Reimbursement edoc questions:

Wendy Dion (wdion@iu.edu or 812-855-9922)