Season's Greetings!

Spotlight

Vol. 8 | Issue 10 | December 2020
A Campus Administrative Training Series (CATS) newsletter

Campus Administrative Training Series (CATS) webinar
We had another successful CATS webinar last week! The recording has been added to the CATS channel and the slides reside on the CATS website as custom.

Resources

Accountable Mail
Check out Mail Services for questions about accountable mail during the intersession.

BAP
We would like to extend our thanks to all of you who attended our CATS sessions this year. We really appreciate you! And to the presenters, we are grateful for your expertise and willingness present at CATS.

Stay tuned for an email with next semester's webinar dates.

Contact Us for comments and/or questions.

CATS Channel

The Knowledge Base

The policies referenced in the CATS Knowledge Base are issued under the authority of various University Administration and Campus offices and do not necessarily reflect policies that are issued and approved by IUB campus administration.

Note: We are diligently working to replace any FMS links with the new information from the Office of the Controller.

Knowledge Base

The purpose of the next sections is to serve mostly as a repository of communication from various sources having to do with IU fiscal transactions. It provides guidance and awareness on fiscal deadlines that may impact departmental budget and your work performance during COVID-19.

Payroll Special Reminders

Pay Run ID M038113020 is the last regular monthly payroll for the 2020 tax year. If you have any outstanding overpayments, you should consider entering adjustment vouchers to collect back the gross amount.

If you know about absent hours in the current month before the monthly payroll is processed, you should enter the ABE hours directly on the voucher to avoid an overpayment.

If any of your exempt staff are terminating during the current month, please ensure the Termination eDoc has been initiated and the paper adjustment voucher has been submitted. All terminal payout for accruals should be processed with the last regular on-cycle payroll.

Please reference HR-10-40 policy and PSOP 12.0: Termination Processing Procedures for Staff Employees.
**Payroll Related Documents to Keep Handy - Please Share with Others!**

- Edoc and Payroll Adjustment Voucher Deadlines
- Year-End Pay Dates and PTO Rollover for Staff Employees
- Holiday Office Closings

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**Changes IUF Scholarship Reimbursements for AY 2020-21**

**IU Foundation Scholarship Reimbursements for 2020-2021 AY**

**Announcements**

The IU Foundation would like to encourage you to start submitting your Scholarship and Award Reimbursement edocs for 2020-2021 **beginning in February 2021** 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, 2021** 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, 2021** 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.

**Training**

IUF Compliance and Disbursement Services Edocs Training sessions (includes all IUF edocs) are available via Zoom. Please visit [ETA Web Notices](#) to review the list of available dates and register.

**Tips**

- 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_2020-2021 (or Spring 2021)

- For examples of acceptable donor intent compliance documentation, please refer to this [Sample Docs required for IUF scholreimbedoc](#) document.

- Both 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.
### IMPORTANT DATES FOR SPRING 2021 (4222)

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Begin submitting 2020-2021 Fall/Spring scholarship reimbursement edocs</td>
<td>2/1/2021</td>
</tr>
<tr>
<td>Fall/Spring 2020-2021 IUF Scholarship &amp; Award Reimbursement edoc should be in IUF's action list to guarantee approval by FYE</td>
<td>4/15/2021</td>
</tr>
<tr>
<td>Edoc approval cutoff for 2020-2021 (2pm)</td>
<td>6/30/2021</td>
</tr>
</tbody>
</table>

### IMPORTANT DATES FOR SUMMER 2021 (4215)

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Begin submitting Summer 2021 scholarship reimbursement edocs</td>
<td>6/1/2021</td>
</tr>
<tr>
<td>Summer 2021 IUF Scholarship &amp; Award Reimbursement edoc must be in IUF's action list to guarantee approval by FYE</td>
<td>6/15/2021</td>
</tr>
<tr>
<td>Edoc approval cutoff for 2020-2021 (2pm)</td>
<td>6/30/2021</td>
</tr>
</tbody>
</table>

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### Office of Student Financial Assistance (OSFA)

#### 2020-21 Academic Year

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spring 2021 Scholarship/Fellowship Entry</td>
<td>Now</td>
</tr>
<tr>
<td>Spring 2021 Financial Aid Disbursement Date</td>
<td>January 10, 2021</td>
</tr>
<tr>
<td>Run Spring 2021 Department Authorization Failure Report</td>
<td>January 11, 2021</td>
</tr>
<tr>
<td>Begin processing Spring 2021 IUF Scholarship Reimbursement eDocs</td>
<td>January 11, 2021</td>
</tr>
</tbody>
</table>

#### Fall IUIE Departmental Authorization Failure Reports

Please be sure to run the IUIE Authorization Failure Report for the Fall 2020 semester if you are posting new awards or making changes to existing awards. Please contact deptsch@indiana.edu for help with running the report.

#### Personalized Training

OSFA offers personalized training based on your department's needs. Please contact the office at deptsch@indiana.edu if you are interested or with any inquiry.

**Note:** For information on how to pay a student, please check out the [Student Payment Guidelines Decision Tree](#).

**For IU Foundation Accounts** (accounts that start with a 25 or 26) - Please contact Emilie Trueblood estrue@iu.edu or call 812-855-2940.

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Office of Research Compliance
The Office of Research Compliance will be closing on Thursday, December 24, 2020 at noon and will reopen on Monday, January 4, 2021.

All offices are monitoring submissions carefully to ensure high priority and expiring submissions are resolved before the closure. Please keep this closure in mind as you plan new submissions and communicate with the appropriate office as soon as possible with any concerns.

If you need immediate attention or have an emergency human subjects research issue during the winter break, please contact Beth Johnson, University Director, HRPP, at bwinnie@iu.edu or call 773-633-7941.

For other research issues requiring immediate attention, please contact John Baumann, Associate Vice President for Research Compliance, at baumannj@iu.edu or call 816-695-7146.

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**Purchasing Closing**

**Closed for the intersession?**

Some IU departments may close during this year's intersession or will have intermittent closures through **February 7, 2021**. As a result, some campus buildings will be closed and recurring services may not be needed. Below are a list of reminders to consider during the break:

- Orders will continue to ship to the "Ship to" address specified on the Purchase Order (PO). Orders will not automatically be forwarded to a new address. Contact the supplier immediately if goods must be shipped to a different address.
  - Need to ship items to a non-IU location such as a home address? Follow the steps outlined in **SOP-PURCH-23**.
- Shipped orders which cannot be delivered, due to no staff at the location to receive or sign for the order, may result in restocking fees charged to your department.
- POs in BUY.IU do not contain tracking or other shipment information. You must contact the supplier to verify whether items have been shipped and when they are expected to arrive.
- Recurring orders, such as Cintas door mat cycling, may not be needed. Contact the supplier directly to notify them of services which should be put on hold during the break.
- If recurring services will continue during the break, ensure the supplier can access closed buildings. Some suppliers, such as Canteen, a snack vending supplier, have access cards and are able to access buildings as needed. Many do not. Contact the supplier, and work with Facility Operations, to ensure they are able to access buildings where services will be performed.

**Questions?** Contact Purchasing using the [BUY.IU Support Form](#).

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**ORA Announces Office Hours for EConfirm (ECC) Assistance**

**Do you have questions about EConfirm (ECC)-tooltip?**
Assistance is available from the Office of Research Administration (ORA). There are many options available. You can chat in a Zoom session during office hours, call, email, or attend one of the training sessions.

**Zoom Office Hours** *(Begin January 18 continuing through March 31, 2021)*

<table>
<thead>
<tr>
<th>Day</th>
<th>Time</th>
<th>Link to Zoom Session Chat</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday</td>
<td>8-10</td>
<td><a href="https://iu.zoom.us/j/87525906735">https://iu.zoom.us/j/87525906735</a></td>
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<tr>
<td>Tuesday</td>
<td>10-12</td>
<td><a href="https://iu.zoom.us/j/86524351131">https://iu.zoom.us/j/86524351131</a></td>
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<tr>
<td>Wednesday</td>
<td>1-3</td>
<td><a href="https://iu.zoom.us/j/85634594489">https://iu.zoom.us/j/85634594489</a></td>
</tr>
<tr>
<td>Thursday</td>
<td>3-5</td>
<td><a href="https://iu.zoom.us/j/85896965311">https://iu.zoom.us/j/85896965311</a></td>
</tr>
</tbody>
</table>

**Call**
Rayna Amerine, Financial Compliance Analyst
(812) 855-1516

Tim Burris, Financial Compliance Manager
(812) 855-0185

**Email:** iueffort@iu.edu

**Training Sessions**
A list of the scheduled EConfirm (ECC) zoom training sessions is available on the web. See [EConfirm (ECC) Training Sessions](#) for details.

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**Training - Financial**

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

**Purchasing**
Purchasing - BUY.IU (videos)

**HRMS Payroll Access**
Payroll

**Travel**
Travel - Chrome River

**Bursar**
Fee Remission Third Party Contracts (TPC) in SIS

**Registrar**
Family Educational Rights and Privacy Act (FERPA)

**Human Resources**
Access and Training
Professional Development Series
Virtual Workshops (all campuses)

**Office of the Treasurer**
Treasury Operations
The Spotlight newsletter serves to educate, inform, provide resources, and empower Indiana University Bloomington employees. Please share this newsletter with others in your units.

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Visit the CATS website.

Budgetary Administration & Planning
Bryan Hall 003, 107 S Indiana Ave.
Bloomington, IN 47405

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