Spotlight

Vol. 9 | Issue 1 | February 2021
A Campus Administrative Training Series (CATS) newsletter

Campus Administrative Training Series (CATS) webinars

We had another successful CATS webinar on January 26. The recording has been added to the CATS channel and the slides reside on the CATS website as custom.

Resources

Protect IU - Weather Notices

- IUB Alert
- Get Emergency Alerts
- IU's Adverse Weather Policy
Stay tuned for an email with the next CATS session date.

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 FMS links contained in our website with the new information from the Office of the Controller.

### OBAP

- BAP SOP Related to COVID - Updated 2/11

### Financial Aid

- Student Payment Guidelines

### Purchasing

- Updates on P-card, MDM, and AP support form (*CATS presentation*)
- A New Support Form is Coming!
- Purchasing COVID-19 FAQ and Resources

### Travel

- Lodging Itemization is Changing for the Better
- Travel Updates (*CATS presentation*)

### UHR

- Job Framework Redesign Project Launches February 21
- HR Working Through COVID-19

### Other Useful Resources

- The Dashboard
- COVID-19 Mitigation Testing
- Employee Assistance Program
- 'Coping with Stress' webinars

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*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.*

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**Office of Student Financial Assistance (OSFA)**

### Upcoming Training

<table>
<thead>
<tr>
<th>Training</th>
<th>Date</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Departmental User Training</td>
<td>Tuesday, March 9</td>
<td>10:00 am – 12 pm via Zoom – to register for Zoom</td>
</tr>
<tr>
<td>Refresher Scholarship Training</td>
<td>Thursday, March 11</td>
<td>10:00 am – 12pm via Zoom – to register for</td>
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**Personalized Training**

OSFA is offering training based on your department’s needs. Please contact the office at [deptsch@indiana.edu](mailto:deptsch@indiana.edu) if you are interested or with any inquiry.

**Spring IUIE Departmental Authorization Failure Reports**

Please be sure to run the IUIE Authorization Failure Report for the Spring 2021 term and Fall 2020 if you are posting new awards or making changes to existing awards. Please contact [deptsch@indiana.edu](mailto:deptsch@indiana.edu) for help with running the report.

**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](mailto:estrue@iu.edu) or call 812-855-2940.

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**Upcoming Changes to FedEx EDI Billing**

**Effective March 1, 2020, Accounts Payable will no longer be using EDI billing for FedEx**

If you are unable to utilize our contracted and preferred shipping partner UPS, you are still able to use FedEx for shipping, but you will need to use one of the following methods:

1) For one-time FedEx shipments, the P-Card is the preferred payment method

2) For multiple FedEx shipments, a recurring purchase order should be initiated in BUY.IU by 2/19/21.

**FedEx Process:**

Please [create the PO number PRIOR to completing the request for shipment on FedEx's website](#). The PO number must be entered in the reference field in the Billing Details section when completing the shipping request. FedEx invoices will still be processed centrally, but you need a PO number and account number so that IU Accounts Payable knows which departmental account to charge for each FedEx shipment. Please be sure to create the PO prior to the shipment to avoid the need for a confirming order.

**Preferred Process:**

You are encouraged to use our contracted and preferred shipping partner, UPS. If your department does not have a UPS account and you wish to request one, please contact Misty Millis [mimillis@iu.edu](mailto:mimillis@iu.edu) to assist with the creation of all new accounts. UPS has very low negotiated rates, excellent and prompt customer service, the same EDI billing offered by FedEx, and Purchasing also has the ability to view shipping and invoice history.

UPS has a dedicated customer service representative, Lauren Wilkinson, who will
assist with any questions concerning their shipping platform, CampusShip. As a contracted supplier, these are just a few of the advantages we have as a result of our partnership with UPS.

ORA - EConfirm Updated Resources

**EConfirm Resources**

- **Four Clicks to Confirmation Video**
  A video to guide PI's through project statement confirmation in EConfirm (ECC) in just four clicks.

- **Confirm Your Project Statement Video**
  A more comprehensive video overview for PI's to complete project statement confirmation in EConfirm (ECC).

- **Confirmer Guide**
  A comprehensive guide for PI's to navigate project statement confirmation in EConfirm (ECC).

- **Effort Coordinator Guide**
  A comprehensive guide to EConfirm (ECC) for Effort Coordinators.

- **Assigning Effort Coordinators Video**
  A video guide explaining how Effort Coordinators are populated in EConfirm (ECC) and how to assign a Primary Effort Coordinator in EConfirm (ECC).

**EConfirm (ECC) Effort Coordinator Training**

- **Training Video**
- **Training Powerpoint**

**EConfirm (ECC) PI Confirmer Training**

- **Training Video**
- **Training PowerPoint**

Email iueffort@iu.edu for questions.

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

**Do you have questions about EConfirm (ECC)?**
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*
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<td><a href="https://iu.zoom.us/j/85896965311">https://iu.zoom.us/j/85896965311</a></td>
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</tbody>
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**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

**ORA**
ECC Confirm Training Schedules

**IU Foundation 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. Contact Wendy Dion at wdion@iu.edu if you have questions.

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
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