Campus Administrative Training Series (CATS) webinar

We had a very successful CATS webinar earlier this month. The recording has been added to the CATS channel and the slides reside on the CATS website.

Save the DATE! The next CATS session is Monday, December 7. As usual, an email will be sent with the agenda and details.

Contact Us for comments and/or questions.

Office of the Controller - The Website!

The newly launched Office of the Controller replaces the FMS website. All links containing "fms.iu.edu" automatically forward to the new UCO home page. Information has been grouped as Compliance, Services, Systems, and Training for your convenience. Visit the page.

Resources
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.

VPCFPO Training and Communication website

The new website offers training and guidance related to financial processes to staff members in the areas of purchasing and travel. Visit the page.

CATS Knowledge Base Activity of the Month:
Software Purchase Approval Process - Purchasing

Updated 11/13/2020 to add new form and IU Knowledge Base links.

Software Purchase Approval Process

The process to purchase and/or renew software or software services requires approval PRIOR to purchase. This approval applies to all purchases or renewals regardless of payment method (Purchase Order, P-card, etc.). Anything purchased from UITS and/or IUWare would not apply. Before submitting the Software and Services Selection Process (SSSP) form, please review the corresponding Knowledge Base document About the Software and Services Selection Process (SSSP) and discuss the purchase with your IT Pro. After the form is submitted, the request will undergo one or more reviews resulting in approval or denial of the purchase. Communication of the review decision is provided to the submitter, the IT Pro indicated on the form, and Purchasing.

For questions, please contact, Lisa Hardy, Contract Manager for Software or call 812-855-5813.

Payroll: Year End Attendance Reminders 2020 - BIWEEKLY paid Staff

The attendance year for biweekly paid staff ends with the last full pay period of the calendar year. In 2020, the last full pay period ends December 26, 2020. All time-off benefit hours used thru 12/26/2020 count towards 2020 usage maximums. Due to COVID-19, max usage limits for 2020 have been waived.
Any hours used beginning December 27, 2020 will count towards the maximum usage for 2021.

You should be running the BW1/BWP Payroll Hours Balance Report(s) in the IUIE (Master Catalog >Departmental Reporting > Payroll Reports-Departmental) for your BW1 and BWP staff after each biweekly payroll. Please review the reports carefully and provide the following information to your biweekly staff employees. Any negative balances should be corrected or calculated as an overpayment.

- You can run the reports today for B036111320. The Pay Period End Date = 10/31/2020

**Biweekly Staff Employees (BW1):**

- Any prior year holiday hours saved from 2019 must be used before December 26, 2020. Hours are listed in the column marked ‘Hol PY’.

**Biweekly Professional Staff Employees (BWP):**

- Any prior year holiday hours saved from 2019 must be used before December 26, 2020. Hours are listed in the column marked ‘Hol PY’.
- You can review the PTO hours accrued during this attendance year in the ‘PTO Acd’ column.
- The accrual rate is listed in the last column marked ‘PTO Acrl’. Employees with a 240 limit accrue 9.24 and a 288 limit accrue 11.08 per pay period (based on 100% FTE).
- The PA leave plans have the same 240/288 limit on the number of remaining PTO hours that may be carried forward to the next attendance year. **You may want to remind employees that have large accrued balances about the December 26th deadline.**
- **Due to COVID-19, employees in PA leave plans are allowed to move ANY AMOUNT of PTO hours into their Sick bank at attendance year-end if they wish to do so. As part of the year-end reset process, we will automatically move all PTO hours exceeding 240/288 to the Sick bank. The employee is allowed to transfer additional PTO hours to their Sick bank, if they wish. You will receive another communication about this process in early January.**
- **Departments with PAU employees using exchange hours:** Those hours will remain in the bank and move over to the new attendance year.

Related Policies:
- SS/SM Policy
- PAO/PAU Policy

If you have any questions, please contact your UCO payroll processor.

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**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.

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**Changes to Tax Location Codes and Tax Distribution with Hire and Maintain Job eDocs**

**Note:** This message went out to eDoc initiators. If you are aware of employees that move out of or into Indiana to live and work, please be sure their Tax Location code is updated. This message does NOT apply if they drive into Indiana to work.

As our workforce has become more remote, we are trying to maintain accurate info regarding our employees’ Tax Location data. To help ensure the compliance of the 90-day rule, we are making the following changes effective Thursday, November 12:

1) When a Hire eDoc or Maintain Job Data eDoc is submitted with a new Tax Location Code for an employee, all job records will have their tax distributions updated to the new Tax Location Code. This means that as of the effective date of the new Tax Location Code, *ALL* jobs held by the employee will be taxed in that state. The employee will also be set up with default tax data for the new State/Tax Location Code.

2) When a Hire eDoc or Maintain Job Data eDoc is submitted with a new Tax Location Code for an employee, an email will be sent to the employee to notify them that their tax location code was changed, what it changed to, and who submitted the eDoc. That way, if there is a problem, the employee can contact the person that submitted the incorrect information and work with them directly to get it fixed. The email also provides links to the different state tax forms and advises how to submit them to our office.

3) We’ve updated the statement on the Employee Self-Service Addresses page to clarify that Address *does not* equal where the employee will be taxed. Here is the updated text: “Home address is your legal residence, used for mailing tax forms such as W-2 and 1095-C and for tax reporting to the IRS. All benefit enrollment information (for eligible employees) and faculty mailings are sent to this address. Please complete and mail in a new state tax form if your state withholding has changed. Employees moving between counties in Indiana should submit a new WH-4 form.”

Please contact the Office of the University Controller with questions.

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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</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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**Intersession Mail Service**

Many IU departments will be closed on or a reduced schedule from November 20, 2020, through February 7, 2021. *If your department requires mail service during this time, send an email to iumail@indiana.edu by November 20.* In your message include:

- Department name
- Address
- Days and times you will be open for pick-up and delivery of mail

If no message is received prior to November 20, it is assumed the department will be closed during the intersession period and will not require mail service. Campus Mail Services will be unable to pick-up/deliver mail at buildings locked during the intersession period. If you request service during this period, please ensure that mail staff have access to your building.

**Mail Services Holidays Schedule**

- December 24, 2020: CLOSED
- December 25, 2020: CLOSED
- December 28, 2020: CLOSED
- December 29, 2020: CLOSED
- December 30, 2020: CLOSED
- December 31, 2020: CLOSED
- January 1, 2021: CLOSED
- January 4, 2021: Return to normal intersession pick-up/delivery schedule
Campus Mail Service will be "on call" during the holiday break for departments that may need emergency processing of metered mail. Contact Bo Shipley in advance when emergency service is needed. Email eshipley@indiana.edu and copy iumail@indiana.edu to make arrangements.

Accountable Mail Service

The courier will be operating during this period for departments that have documents that must travel around campus, with the exception of the holiday closure of December 24–January 4. Departments should note that the Office of the Bursar will be closing at the end of the business day on Wednesday, December 23, 2020, and will be closed during the break, reopening Monday, January 4, 2021. Departments that are open should plan accordingly and have all needed change orders placed by Tuesday, December 22, for delivery on Wednesday, December 23.

Anyone requesting accountable mail pick-ups must be on campus and available. Deliveries to units must be confirmed with the contact in advance to ensure delivery. Campus Mail Services will not hold accountable mailbags overnight during this period.

The bursar’s office will not process cash receipts during the down time. Cash receipts will be held in the appropriate safe and will be processed and entered in KFS upon return on January 4.

ORA: What is EConfirm (ECC)? THINK Training!

ECC replaces the prior Indiana University Kuali Financial System (KFS) effort reporting process.

BENEFITS OF ECC

- Effort confirmed annually, on a calendar-year basis, rather multiple times throughout the year.
- Effort activity aggregated at the Kuali Coeus (KC) award family level for all employees with effort on any account belonging to that award family. This results in a "Project Statement" instead of a report for each individual employee.
- Project statement confirmation required only on Federal and Federal Pass-through awards.

These changes reduce the number of statements requiring action by Project Directors/Principal Investigators (PIs) from about 10,000 effort documents, to approximately 2,000 project statements.

ECC ROLES

**PI Confirmer – IU Project Director/Principal Investigator**

Project Directors/PIs with federal or federal-pass-through sponsored projects are automatically assigned the role of “PI Confirmer” in the ECC system. They are the individuals notified when the Project Statements are ready for the annual confirmation in March.

**Effort Coordinator – IU Fiscal Officer/Delegate**

The ECC Effort Coordinator is a Department-level administrative role in ECC. An Effort Coordinator assists the ECC Confirmer (Project Director/Principal Investigator) with questions related to effort on their projects.

- The ECC Effort Coordinator is responsible for facilitating any required salary transfers identified during the confirmation process.
Effort Coordinators also receive Tasks within ECC. Tasks are generated when an ECC Confirmer requests a change to the labor on a project statement. It is the Effort Coordinator responsibility to approve or deny each task.

- Effort Coordinators are associated with Departments
- Departments in ECC correspond to the Chart-Org code in KFS.
- Each project statement belongs to the Department identified as the Lead Unit in KC award.
- Each Department is required to have one Primary Effort Coordinator.
- Each Department can have as many secondary Effort Coordinators as needed.

**TRAINING**

- See [Zoom Training Dates](#). The training sessions are one hour, with additional time provided after each training session for questions.
- **No registration or signup is required.**
- To join a session, click the date/time for Zoom session you wish to attend.
- Beginning in January 2021, the Office of Research Administration (ORA) will host office hours to address any questions or concerns with the ECC system.
- Please contact iueffort@iu.edu with any questions.

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**Training - Financial**

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

- **Purchasing - BUY.IU** (videos)
- Payroll
- Travel - Chrome River
- Fee Remission Third Party Contracts (TPC) in SIS
- Family Educational Rights and Privacy Act (FERPA)
- **Human Resources**
- Professional Development Series
- Virtual Workshops (all campuses)
- **Office of the Treasurer**
- Treasury Operations
- **ORA**
- **ECC Confirm Training Schedules**

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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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