Campus Administrative Training Series (CATS) webinar

CATS sessions now have a hub where you can go watch previous presentations. We launched the CATS webinar channel last month and it's gotten a lot of views since then. Thanks for attending CATS.

Contact Us for comments and/or questions.

CATS Channel

Flu Shot

Make your appointment today and check getting your flu shot off your to do list. Schedule your flu shot now.

Elections

The 2020 general election is scheduled for Tuesday, November 3rd. Please visit the Provost website for resources on how to vote. You may pass on this information to the students in your units.

See Voting Resources and Monroe Co Election Central.

Resources

Edoc and Payroll Adjustment Voucher Deadlines
Purchasing COVID-19 FAQ and Resources
HR Working Through COVID-19
Student Payment Guidelines
Open Enrollment: A notice to eDoc Initiators

Open Enrollment will occur from October 26 – November 6 this fall.

With Open Enrollment right around the corner, this time of year is often problematic if 1/1/2021 New Hire eDocs are processed before final benefit plan and rates are published in HRMS. We don’t want new hires to receive 2020 plan information and rates when their benefits aren’t effective until 2021. We’re asking that you delay submitting new hire edocs (or other job actions that may affect benefits) with effective dates of 1/1/2021 or after until November 11, 2020.

Send a message to askhr@iu.edu for questions.

HR Announcements

Please review and distribute the announcements Year End Pay Dates and PTO Rollover for Staff Employees and Holiday Office Closings to your unit’s department heads and managers. They include important information regarding year-end pay dates/PTO rollover and the use of PTO and vacation hours to cover a Holiday Closing (December 24, 2020, through January 1, 2021). Please post hard copies of these announcements in work areas where employees have limited computer access.

Please Note:

If a department or unit is considering closing during the holiday break or extending beyond the dates above, staff employees must be notified in writing at least 30 calendar days in advance of the closing to ensure they have enough paid time off accruals (PTO, Vacation, or Comp Time) to cover their time off.

Due to COVID-19, many staff members have taken very little time off this year. Please encourage supervisors in your units to be as flexible as possible in support of employees using their accrued time off during the remaining months of 2020.

Frequently asked questions related to holiday and end-of-year time off usage will be updated on the IU HR website soon.

For questions, please contact askhr@iu.edu or 812-856-1234.
have disbursed. If the award should be disbursed, please submit a Manual Disbursement Form. If the award should not be disbursed, please cancel award in the SIS.

**Continuation Accounts**

As a reminder, please check your continuation account to see if your department has any item types associated with it. Every department should have a continuation account which would be similar to 23- xxx-89. This account allows any system to accept expenditures if an account within the unit has expired, such as a C&G account. The continuation account should be reconciled as soon as possible and those expenses moved to a more appropriate account. No expenditures or income should ever reside in the continuation account. Therefore, item types for financial aid should never be associated with a continuation account. If a financial aid award hits the continuation account please work with the Financial Aid Office at IUB to reassign the award to a more appropriate funding source with the appropriate item type to be used.

**Item Types**

Item types are associated with specific accounts. The item type should mirror the purpose, the funding source, and if the funding will be for a graduate student or undergraduate student. Gifted funds for undergraduate students should be a 25-account and the object code 5880. The item type, object code and the career of the student should be in sync. This is how financial reporting has fiscal integrity. Item types for graduate students should also follow the same practice. Their account will be a 26-account and the object code will be 5820 for a fellowship or 5400 for fee remissions.

See grid:

<table>
<thead>
<tr>
<th>GIFTED FUNDS</th>
<th>Undergraduate</th>
<th>Graduate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purpose</td>
<td>Scholarship</td>
<td>Fellowship</td>
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<tr>
<td>Account</td>
<td>25-xxx-xx</td>
<td>26-xxx-xx</td>
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<tr>
<td>Object Code</td>
<td>5880 – Scholarship</td>
<td>5820 – Fellowship</td>
</tr>
<tr>
<td></td>
<td></td>
<td>5400 – Fee Remission</td>
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</tbody>
</table>

**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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**Payroll: Tracking Primary Physical Work Location for Employees Living Outside of Indiana**

Please review the following information if you have employees in your department living and working outside of Indiana.

- Be sure to initiate the eDoc to change Location code on all active jobs.
- Remind the employee to update their Home address in the Employee Center on One.iu.edu
- They should also sign up for electronic W-2 delivery to avoid waiting for a paper copy to be mailed. This is also in the Employee Center on One.iu.edu
- Remind the employee to review tax information and complete other state forms:
  Employees Working Outside of Indiana
**Remote Work Location & Taxation**

If an employee is physically working outside of the state of Indiana for more than 90 consecutive days within a 12 month period, the employee should notify and receive approval from their supervisor. The supervisor should then notify the department’s HR representative who will facilitate the processing of an eDoc to ensure proper out-of-state compliance for taxation, labor laws, etc. Certain states do require tax withholding for individuals living and working physically in their states once a certain time period has passed. Simply updating your mailing/home address via One.iu does NOT change physical work location for tax withholding purposes.

- If you are working or plan to work remotely outside of the U.S., approval must be obtained from the General Counsel Office.
- See more information about working outside of Indiana at the [HR website](https://hr.iu.edu).
- For additional questions regarding taxation, contact the [University Tax Services Team](https://tax.iu.edu).
- For questions or guidance on telecommuting, contact [askHR@iu.edu](mailto:askHR@iu.edu).

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**ORA: Miscellaneous Object Codes on Sponsored Projects**

The use of miscellaneous object codes on sponsored award accounts is an audit red flag. In Fiscal Year 2020, the ORA Grants Finance and Operations team removed close to $85,000 in unallowable charges from sponsored accounts.

Transactions on the miscellaneous object codes shown below are automatically removed from sponsored accounts to the departmental continuation account.

1940 - Refunds of expenses and Supplies  
4200 - Miscellaneous Expense  
5055 - Other Expense  
5000 - Other Supplies and Expense

If you believe an expense moved off a sponsored account is allowable, it may be transferred back to the sponsored account with an object code that best matches the cost category. If reapplying to the sponsored account, you must provide an explanation to justify the expense reclassification.

If you have any questions, please feel free to contact Damien Erwin, dserwin@iu.edu.

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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  
- Treasury Operations  
- 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)

Research Administrator Team (RAT) meeting:  
- November 10, 1:30-3:00 pm (Zoom)
The Spotlight newsletter serves to educate, inform, provide resources, and empower Indiana University Bloomington employees. Please share this newsletter with others in your units.

Submit a Comment  |  Subscribe/Unsubscribe

Visit the CATS website.

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

This message is intended for (nvazquez@indiana.edu). Learn why we're including this: go.iu.edu/emailsafety.

To update communication preferences, visit the Profile Center.