Budget Administration and Planning: Reminder

Budget Construction FY15 is drawing to a close. A reminder not to share salary information with employees as the Board of Trustees does not approve the budget until the end of June or July 1st when salary letters are sent to departments.

Policy Station → Visit the IU Financial Policies Web Site ←

Non-Solicitation on Campus FIN-PUR-21.0 (Effective March 31, 2014)

Reason for Policy: To avoid disruption of business operations or disturbance of University employees, students, and visitors, Indiana University has implemented this non-solicitation policy to address commercial solicitation on University property or within University facilities.

Policy Statement: This policy places certain restrictions on commercial solicitation within buildings and facilities as well as on the grounds of Indiana University campuses or under the operating authority of the University to ensure that university employees and students have the opportunity to perform their duties free from intrusions.

Sale of Computing Equipment FIN-PUR-14.1 (Last Updated: March 31, 2014)

Reason for Policy: To promote the most beneficial use and return on investment for computing technology at Indiana University. To define and direct how computing technology with storage devices and institutional information shall be managed before the technology is removed from University campuses.

Policy Statement: Sale of university property to any individual or entity other than IU departments must be directed by the campus Procurement Services. Disposal of property for personal gain or favor is prohibited and illegal. In addition to these procedures governing computing equipment, there are three other approved methods for sale or disposal of equipment as governed under the aforementioned purchasing policy: Public Auction, Solicitation of bids from vendors/public, and IU Surplus Stores.

Please see the What’s New tab on the web site for Policies Under Review.
**Fiscal Checklist &Deadlines**

### Payroll: Termination Processing Procedures for Staff Employees

**FMS Website Update** - Termination Processing Procedures for Staff Employees

The instructions for processing **staff terminations** have been updated after the implementation of **Kuali Time**. Please review the FMS [Processing Procedures for Staff Terminations](#) page when you need to submit paper adjustment vouchers for BW1 or BWP terminations.

*If you have questions, please contact your FMS Payroll Processor.*

### Payroll: Adjustment Vouchers - FLSA Pay Data Link

**Adjustment Voucher Entry Reminder for BW1, BWP, HRR, HRP, HRW, HRX paygroups:**

- Please be sure you are reviewing the [FLSA Pay Data](#) link for each week before you submit adjustment vouchers.
- View the [Adjustment Voucher – FLSA Pay Data Link](#) instructions document with explanation and screenshots for guidance.

### Payroll: Increase Hourly Wage to $8.25 for Temporary Employees

It was recently announced as part of the annual budget guidelines that the university is increasing the minimum wage to $8.25/hour for fiscal year 2014/2015. UHRS is working with UITS to implement a batch process to assist with this hourly rate increase for employees. **Note that there are no Staff employees who are currently paid below this rate, so the changes below only apply to Temporary employees.**

Here’s the **timeline** and **plan** for this process:

- **In April,** UHRS ran the semi-annual batch process to terminate Temporary jobs that have not been paid against since 2/1/13.

- **Between now and 6/6/14,** units should:
  - Review and terminate all other Temporary jobs that are inactive and should not receive an increase.
  - Process a Maintain Pay Rate E-Docs for jobs that units want to increase to a rate **HIGHER** than $8.25, **using an effective date no later than 6/22/2014 (the start of the pay period that crosses fiscal years).**

- **On 6/12/14,** UHRS/UITS will run a batch process to increase the pay rate to $8.25 **(effective 6/22/14)** for all active Temporary jobs that have a pay rate that is less than this.

*For questions about this process please contact Laura Kress lkress@iu.edu or Mary Byrde mbyrde@iu.edu.*
PAYROLL: WORK STUDY - END OF ACADEMIC YEAR 2013-14

Work Study Reminder:
The 2013-2014 academic year work study period for undergraduate students ended on May 10th.

- Work study students must receive a new award and be appointed each Work Study session (academic year and summer).

- After May 10, 2014 please do not let students clock in or record hours on their academic year WS.

→ If your student(s) has received a work study award for summer session, please process a Maintain Job eDoc with the new summer session job class and limit information. They will appear on the WS voucher with the summer work study information listed on the left.

→ If your student(s) did NOT receive summer session awards, timesheets will continue to be generated and their academic year job information will continue to appear on the WS voucher until you process a termination eDoc.

→ If the work study student will not be returning to work for your department in the fall, please process the Termination eDoc as soon as possible with an effective date of May 11, 2014.

→ If you have any questions, please contact your FMS Payroll Processor or Kathy Sexton-Stephen, kfsexton@indiana.edu or call 855-8744 for assistance.

IUIE – Kuali Time Reports

Please review the following information about Kuali Time IUIE reports:

- Q. Not sure which Time report to run during the pay period and after the pay period is over?
  A. See information about When/How to Audit Time: http://www.fms.indiana.edu/kualitime/Kuali-Time-Reports-Audit-Recomm.pdf

- Q. Not sure what Time reports are available or how to enter the selection criteria?
  A. See information about running reports or using the data groups: http://www.fms.indiana.edu/kualitime/TIME_IUIE_Reports.pdf

- Q. Need general Time information including access, support, training, and tutorials for employees and approvers?
  A. See Kuali Time Information Page: http://www.fms.indiana.edu/kualitime/home.asp

SPECIAL INTEREST:

1920 ⇒ The School of Commerce and Finance is established (renamed School of Business Administration in 1933, School of Business in 1938, and Kelley School of Business in 1998).

1921 ⇒ The School of Music is established. In 2005 is renamed Jacobs School of Music in honor of Barbara B. and David H. Jacobs following their relationship with IU and their donation to the school.
For those who enter scholarships/fellowships you need to run the Departmental Authorization Failure Report for Spring 2014.

**Summer 2014**
July 28, 2014 - Deadline for Summer 2014 Scholarship/Fellowship Entry

**2014-2015 Academic Year**
May 20, 2014 - Scholarship/Fellowship Priority Entry Upperclass and Graduate Students

**Item Type Creation “On-Time Date”**
Now is the time to begin requesting new SIS item types for any scholarships/fellowships that you wish to begin awarding in Summer 2014. The new item type creation process can take a maximum of six weeks to complete, depending upon volume and staffing. In order to ensure that new item types are ready for use before the entry deadline, you must submit item type creation requests no later than **June 16, 2014** for summer awards. New item type requests submitted after this date may not be completed before SIS entry access is closed for 2013-14. To request a new item type, complete and submit the Item Type Request Form located on the [OSFA Scholarship Processing Intranet](#).

Award expenses will be charged to the account number entered here. Please be sure that the account entered is currently active before submitting this request. Item type requests with GL accounts beginning with a 25 or 26 must be submitted by Glenda Maddox.

**Item Types May No Longer Be Deactivated**
Many aspects of Item Types can be changed to recycle Item Types that are no longer needed for their original purpose. Deactivation of an Item Type will no longer be accepted. Please complete the Update Item Type Request form located on the OSFA Scholarship Processing Intranet to request a change to any of the following aspects of an existing Item Type:

- General Ledger Account
- Description
- Minimum Number of Credit Hours Required for Disbursement

The IUIE Item Type reports can be used to find all existing Item Types for a department. For instructions on running these reports please refer to the Item Type Reports section of the Department Scholarships Manual (under Documents on the OSFA Scholarship Processing Intranet).

Questions? Please send an email to [deptsch@indiana.edu](mailto:deptsch@indiana.edu).
2013-2014 Academic Year TPC information:

- Please remember that the IU Department TPC Request page will be turned off for the 2013-2014 Academic Year on June 16, 2014.
- Summer 2014 will be turned off on September 16, 2014.

Fall 2014 TPC-Fee Remission information:

The spreadsheets for fall 2014 will be sent beginning Friday June 20th 2014. If you do not receive your list by Friday June 27th, please send an e-mail to remit123@indiana.edu.

The first upload to the underlying Third Party Contract tables should occur on Tuesday July 8th. This means if the student is enrolled for fall 2014 at that time it will calculate and show on the bursar account. You may continue to make additions or changes, and if they are complete by July 17th, they will show on the initial bill for fall 2014. Remember that OSFA needs to review fee remissions before they post for financial aid recipients, so allow at least two workdays before the 17th.

Please see the calendar below for more fall 2014 (4148) TPC processing dates.

<table>
<thead>
<tr>
<th>FALL 2014</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submit requests for batch TPC process</td>
<td>Before 7.1.2014</td>
</tr>
<tr>
<td>Fall 2014 tuition and fees appear on student account (if student enrolled in fall term)</td>
<td>7.7.2014</td>
</tr>
<tr>
<td>Fee Remissions begin to calculate on student accounts</td>
<td>7.8.2014</td>
</tr>
<tr>
<td>Deadline for fee remission data entry for the July bill (need to allow time for OSFA review)</td>
<td>7.15.2014</td>
</tr>
<tr>
<td>1st day for fall financial aid disbursement (if all eligibility tests passed)</td>
<td>8.15.2014</td>
</tr>
<tr>
<td>Fall 2014 classes begin</td>
<td>8.25.2014</td>
</tr>
<tr>
<td>IU Department TPC Request page turned off for the 2014-2015 Academic Year</td>
<td>6.16.2015</td>
</tr>
</tbody>
</table>

If you have questions or concerns send an e-mail to remit123@indiana.edu.
**Audit Tips** “Things to Do and to Know” to Decrease Risk and Loss

---

**Policies Governing the Ownership of IU Property**

**IU Property/State Property** - Anything purchased by or donated to Indiana University—including laptops and other electronic equipment—is State property and cannot be sold or retained by an individual upon separation from the University. See policy [Disposal and Redistribution of University Property FIN-PUR-14.0](#).

**Ownership of Capital Assets** - Ownership of capital assets purchased with federal funds is either retained by the federal sponsoring agency or vested in the University, depending on the regulations of the agency and the terms of the grant. Capital assets do not become the property of the project director or the investigator. See policies: [Ownership of University Capital Assets FIN-ACC-I-270](#) and [Capital Movable Asset Physical Inventories, Tagging and Location Changes FIN-ACC-I-170](#).

**Disposition of IU Property Upon Employee Separation from the University** - The departing faculty member must receive approval of the department chairperson, school dean, appropriate campus research office, and the Assistant Vice President of the Office of Research Administration in order to take grant equipment to the new institution. See policy [Equipment Transfers III-70](#).

**Disposal** - Disposal of property for personal gain—i.e., by way of keeping or selling the property— or as a favor—i.e., giving the property to an individual or a group, irrespective of whether the group is also a 501(c)(3) organization—is prohibited and illegal. See policies [Disposal and Redistribution of University Property FIN-PUR-14.0](#) and [Sale of Computing Equipment FIN-PUR-14.1](#).

---

**Restricted Uses of the Procurement Card (P-card)**

The IU Internal Audit Department may conduct periodic audits of cardholder transactions and supporting documentation. Additionally, the IU Purchasing Card Administrator will review transaction activity reports to ensure cardholders are adhering to the IU policies and procedures. One of the items that are strictly prohibited is payments for personal services/honorariums.

Please review the [P-card guidelines](#) for the full list of restricted items.

---

**Time Auto-Approval and Corrections** (formerly referred to as “retouches”)

- **Auto approvals** are concerning, particularly at the Time Approver level, because *that means the timesheets were not reviewed for accuracy.*
- **Corrections** indicate that employees are not using the system correctly to record their time.

*Both put the University at risk of improperly paying our staff.*

University-wide we have auto approvals on 7% of our timesheets, and corrections on about 23% of our timesheets. Our current goal is to reduce the percent of auto approvals to about 2%, and the number of timesheets with corrections to about 10%.
**TAX TIDBIT**

Summer is almost here. **Will your department hire an international student?**

If so, there are a number of tax considerations especially if the student is not registered for summer session. **Tax-withholding issues need to be reviewed.**

Please contact University Tax Services’ NRA Specialists - JoAnn Clune or Rashul Sartoris at taxpayer@indiana.edu.

---

**INTERCONNECTED**

**Reminder of Univ. Guidelines for Political Campaign Invitations, Events and Activities**

As we enter another political campaign season it is important for all members of the Indiana University community to be aware of IU policies that govern the use of university resources with respect to political activities. Please view the guidelines here.

---

**REARVIEW**

**Disbursement Voucher Certification Program**

Message to KFS Users:

**Coming in July 2014**, the Office of Financial Management Services (FMS) will be launching a **Disbursement Voucher (DV) Certification Program** which will require KFS users to obtain certification in order to initiate DVs after August 31st, 2014.

**WHY CERTIFY?**

The DV is an extremely complex financial processing document that carries significant risk to regulatory compliance and the safeguarding of University funds. The DV Certification Program (reinstated) is a collaborative effort, including Financial Management Services (FMS), Office of Procurement Services (Purchasing), Office of Travel Management Services (Travel), and others. This certification will help ensure understanding of DV processing procedures, thus decreasing processing errors and saving initiators time and effort.

We will provide plenty of training opportunities and formats to ensure a smooth certification process. More details will be coming soon!

---

**Quote:**

“When you accept a position of responsibility, be responsible to the position.”
— Karen Larson-Reuter
Please note that training dates and information might change over time. Contact the responsible unit or contact person to be informed of the current status or a specific item.

### Office of the Treasurer
➤ Go to Office of the Treasurer’s website, find “General Information” on right hand side and click on “Training” for more detail.
Revenue Processing Training (Click to register)
Monday, May 12 from 1:00pm - 3:30pm - IMU-Frangipani Room

### Campus Administrative Training Series (CATS)
➤ For additional dates and topics please visit the CATS web site.
Wednesday, May 14, 1:30 - 4:00pm - IMU-Frangipani Room
Monday, June 16, 1:30 - 4:00pm - IMU-Frangipani Room

### Travel
➤ For additional information please contact Donna Burkhardt.
Travel@IU Training (Click to register)
Wednesday, June 18 at 9:00am - Poplars W183
Wednesday, July 18 at 9:00am - Poplars W183

### KFS Purchasing
➤ For additional information please contact Donna Burkhardt.
KFS Purchasing Training Basics (Click to register)
Tuesday, May 27 at 9:00am - Poplars W183
Tuesday, June 24 at 9:00am - Poplars W183
Tuesday, July 22 at 9:00am - Poplars W183

### Organizational Development Classes for Summer 2014
are now online and available for registration.
➤ Legal Compliance Refresher, Part 1 (Click to register)
Topics: ADA, FMLA, Worker’s Compensation
Tuesday, May 13 from 9:00am-12:00pm - IMU Walnut Rm

➤ Legal Compliance Refresher, Part 2 (Click to register)
Topics: Equal Employment Opportunity, FLSA
Tuesday, May 20 from 9:00am-12:00pm - IMU Walnut Rm

➤ Form I-9 and E-Verify Compliance (Click to register)
Tuesday, June 24 from 9:00am-10:30am - IMU Persimmon Rm

➤ Legal Compliance Series (Click to register) is offered at various dates/times and covers topics such as Sexual Harassment, Equal Opportunity Employment, FMLA, ADA, and Worker’s Compensation.

➤ Online Training (Click to register) offers Compliance Training, Corrective Action, and Departmental Orientation (for supervisors and managers).
Thank You each one for your dedication to IUB — IU’s history and tradition is exemplary — that history is due to all employees that are hard working individuals.

Special Thanks to Dan Rives for his 23 year tenure — Dan’s expertise in the health care, retirement and human resource world has been exceptional. Dan will be missed by many of us who contact him daily for advise and direction.

A special shout out to those retirees who work with our office — we know there are so many others and we wish you all the best.

A few other names:

Linda Bettis, VP for Facilities
Bonnie Burks, Office of Vice Provost for Research
Susie Clendening, Environmental Health and Safety
Harriet Figg, IIDC
Becky Mullen, Orientation
Susan Parrish, University Budget Office
Doug Porter, Parking
Becky Stancombe, VP for Facilities
Joy Stephens, VP for Facilities
Nancy Wilson, VP for Facilities
Karen Wright, Budgetary Administration & Planning

Best Wishes To You All!
Upcoming issue ...

Our next Spotlight issue is coming in July 2014 and will include:

- All current sections
- And much more...

Spotlight

Vol. 2, Issue 3
May 2014
Indiana University
Bloomington, IN

The Spotlight is a publication designed to Educate, Inform and provide Resources to Empower Indiana University Bloomington employees.

Contact Information:
Rozzie Gerstman
gerstma@iu.edu

Contributors:
T. Michael Ford
Patti Quimby
Nancy Vázquez-Soto

Special Thanks to:
Carol Ball
Mary Byrde
Michael Grubb
Kimberley Kercheval
Glenda Maddox
Sandy McElhinney
Susan Norrell
Samaria Warsaw

Disclaimer: Please note that any information and commensurate dates that appear in this publication are only current as of the date of publication and may change over time. Hence, please contact the responsible unit or contact person to be informed of the current status for a specific item.