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“THE SPOTLIGHT PUBLICATION SERVES TO EDUCATE, TO INFORM, TO PROVIDE RESOURCES, AND EMPOWER INDIANA UNIVERSITY BLOOMINGTON EMPLOYEES.”

BUDGETARY ADMINISTRATION & OPERATIONS (BAO)

WORKSHOP ANNOUNCEMENT

KFS & HRMS ROUTING WORKSHOP
MONDAY, SEPTEMBER 26
1:30 – 3:00PM
OAK ROOM, IMU

PLEASE SHARE THE TOPIC WITH THOSE IN YOUR DEPARTMENT THAT COULD BENEFIT FROM THIS WORKSHOP.

Send an email to cats@indiana.edu if you have questions
and if you’d like to receive emails from us
about Spotlight and CATS sessions.

DID YOU KNOW...

Did you know that on Tuesday, September 27, from Noon-12:30 p.m., Healthy IU will have a walk to raise awareness about sleep health?

Click this link for registration, route, and more details.

Make sure to bring all your friends, students, and coworkers!
POLICY STATION

University Financial Policy: **FIN-TRV-2.0, Reimbursement of Travel Expenditures**

**Last Updated:** 06-01-2016

Please disseminate to your staff and campus community that policy FIN-TRV-2.0, titled “Reimbursement of Travel Expenditures” has been completely revised and updated.

**Reason for Policy** (as stated in the policy):
“To provide guidance regarding the type of travel related expenses that may be reimbursed from University funds.”

Contact Jill Schunk (jschunk@iu.edu) or T. Michael Ford (tmford@iu.edu) if you have any questions.

See the What’s New tab on the website for policies under review. For questions/comments about the policy process, please contact the Office of Policy Administration.

FISCAL CHECKLIST & DEADLINES

Office of Student Financial Assistance (OSFA) Important Dates & Deadlines

**Fall IUIE Departmental Authorization Failure Report**

Please be sure to run the IUIE Authorization Failure Report for the Fall 2016 semester if you are posting new awards or making changes to existing awards. For instructions on running this report, please refer to the Departmental Authorization Failure section of the Department Scholarships Manual (under Documents on the OSFA Scholarship Processing Intranet).

**Upcoming Trainings**

- Departmental User Refresher Training
  September 22| 9:30am-11:30am| Oak Room, IMU

- FA 101 Workshop (RSVP at deptsch@indiana.edu)
  October 19| 9:30am-11:30am| Oak Room, IMU
  October 20| 9:30am-11:30am| Dogwood Room, IMU

**Questions? Please send an email to deptsch@indiana.edu.**

TPC Fee Remissions

Stay tuned for the next Spotlight in October for fee remission reminders and updates.

*Contact the Bursar to schedule a training session or if you have any questions by phone at 812-855-2636 or email to bursar@indiana.edu.*
Reminders from the Payroll Office

Listed below are some reminders from the Payroll office. We have removed direct links for security reasons, but you can find additional info on the FMS website (fms . IU . edu).

**Duo Authentication.** UITS has implemented additional security for many payroll and HR systems by requiring two-factor authentication via Duo before employees can access direct deposit information, forms W-2, and other personal information. If your employees have yet to enroll in Duo, please encourage them to type “Duo Authentication” in the search area of One . IU . edu, and follow the instructions. If they continue to have difficulty logging into the system, they should go to IU’s Knowledge Base at kb . IU . edu and type “At IU, what should I do if I have trouble logging into CAS?” in the search field. They can also call the UITS Support Center at 812-855-6789.

**Paperless New Hire Process.** Please do not collect paper direct deposit and tax forms from new employees. Instead, please let them know they will receive an email message from FMS with links to setup direct deposit, tax withholding, and electronic W-2 delivery.

**Employee Center.** Please remind all employees about the online information available in the Employee Center on One . IU . edu:
- **Total Compensation information:** review salary and IU contribution information
- **Payroll & Tax Information:** review/modify paycheck, direct deposit, W-2, and tax withholding information
- **Benefits:** review/modify enrollment information
- **Employee Information:** review/modify personal and contact information
- **Paycheck Modeler:** calculate potential take-home pay based on a variety of scenarios, including changes to tax withholdings, retirement contributions, and insurance deductions

**Social Security Numbers.** Please help us collect the Social Security Number for all employees. The Social Security Number is not required to issue a payment, but it is required to issue the W-2 tax form at the end of the year. We send reminders once a month to departments indicating which employees are missing this information. Pursuant to IRS regulations, we could be fined $250 for each missing Social Security Number on the Form W-2. Please communicate with employees regarding SSNs and the importance of collecting this number for tax filing purposes.

**Employees Living and Working Outside of Indiana.** There are special tax rules and withholding for employees that will live and work outside of Indiana. Please familiarize yourself with this information by going to fms . IU . edu / tax, selecting “Employees” from the left navigation bar, and then choosing the “Working Outside Indiana” link.

**FMS Payroll Website.** Here is a sample of information you can find by going to fms . IU . edu / payroll and selecting “Payroll for Processors” from the left navigation bar:
- Kuali Time support, training, and documentation
- Recording hours worked on IU observed holidays
- How to process termination payout for staff employees
- Earn codes for attendance, additional pay, regular pay, and non-cash fringe benefits
- Policies related to payroll administration
- Payroll processing calendars
- Review object code table for fringe benefit calculation
- IUIE jobs available for departmental reporting

**Overpayments.** If you discover that an employee has been overpaid, please contact your payroll processor in FMS. Depending on the timing, you may be able to stop the pending direct deposit transaction. You can find detailed Overpayment documentation by going to fms . IU . edu / payroll and selecting “Payroll for Processors” from the left navigation bar, and then choosing the “PSOP 2.0 Overpayment” link.

Thank you for your efforts to pay everyone timely and accurately!

If you have any questions, please contact your FMS Payroll Processor.
FISCAL CHECKLIST & DEADLINES (continued)

A-21 Effort Reports - Reminder

A quick reminder that the Spring Effort Certifications generated August 15th are to be finalized by October 14th, 2016. Keep in mind, there may be others in future routing that need time to review and approve.

The Summer Effort (A03) salary transfer cut-off deadline is September 29th, 2016. Those Effort Certifications will be generated on October 15th.

Additional information regarding A21 effort certification document approval in the Kuali Financial System can be found at: http://www.researchadmin.iu.edu/GrantContract/gcfogfo/gfo_effort.html

Please contact Rayna Amerine if you have any questions. Refer to the KFS Effort Certification Guidance for Document Routing and Approval and check out the Effort Certification website for more information.

TAX TIDBIT

OBJECT CODES DRIVE TAX REPORTING!

OBJECT CODES DRIVE TAX REPORTING!

Tax Season is upon us. You should check out our Frequently Asked Questions for the 1099-Misc form! These questions will help you in determining which object code to pick and why it is important.

Please remember that services being performed in the US are reportable to the IRS on the Form 1099-Misc.

You can find our FAQ on the Financial Management Services (FMS) web page under Tax/Independent Contractors/Form 1099-MISC/FAQs.

For assistance, please contact University Tax Services’ NRA Specialists LeAnn Clune or Tonya Pottorff.
Please note: Training dates and information might change over time. Contact the responsible unit or contact person to be informed of the current status for a specific item.

**Campus Administrative Training Series (CATS)**

**Wednesday, September 28**
1:30pm – 3:30pm ~ Frangipani Rm, IMU

*For additional dates and topics please visit the [CATS web site](#).*

**Office of the Treasurer**

All full-time employees involved in revenue processing or with access to University banking/payment card systems must attend a Face to Face Revenue Training every 2 years.

- **Treasury Revenue Processing Training**
  - **Friday, October 21**
  1:00pm – 3:30pm ~ Dogwood Room, IMU

**Monday, November 3**
1:00pm – 3:30pm ~ Dogwood Room, IMU

*Register for Face to Face Training*

Questions? Please email [Melissa Hartley](mailto:melissa.hartley@indiana.edu) or call 812-855-2930.

**Fee Remission Third Party Contract (TPC) Training:**

Training for new users is offered on the 2nd Tuesday of each month at 12 noon.
To schedule a training session, please send an email to [bursar@indiana.edu](mailto:bursar@indiana.edu).

**Travel**

- **Basic Travel Expense Module (TEM)**
  - **Wednesday, September 28**
  9:00am – 11:00am ~ Poplars W183

*For additional information please contact [Donna Burkhardt](mailto:donna.burkhardt@indiana.edu).*

Also, see [Travel Video Tutorials](#).

**KFS Purchasing**

- **KFS Purchasing Training Basics**
  - **Wednesday, October 5**
  1:30pm – 3:30pm ~ Poplars W183

*For additional information, contact [Donna Burkhardt](mailto:donna.burkhardt@indiana.edu).*

**OSFA Upcoming Trainings**

- **Departmental User Refresher Training**
  - **Thursday, September 22**
  9:30am – 11:30am | Oak Room, IMU

- **FA 101 Workshop (RSVP at deptsch@indiana.edu)**
  - **Wednesday, October 19**
  9:30am – 11:30am | Oak Room, IMU

**Kuali Time for Supervisors and Payroll Processors**

- **Thursday, October 13**
  10:00am – 12:00pm ~ Poplars W183

*Required class for new payroll processors. Must complete before attending the required Payroll Essentials class.*

- **Payroll Essentials**
  - **Friday, October 13**
  9:00am – 12:00pm ~ Poplars W183

*For additional information, contact [FMS Training](#).*

**FMS Payroll**

- **Kuali Time for Supervisors and Payroll Processors**
  - **Thursday, October 13**
  10:00am – 12:00pm ~ Poplars W183

Required class for new payroll processors. Must complete before attending the required Payroll Essentials class.

- **Payroll Essentials**
  - **Friday, October 13**
  9:00am – 12:00pm ~ Poplars W183

*For additional information, contact [FMS Training](#).*

**Organizational Development Classes** are online and available for registration.

6 new Fall 2016 session added!
Upcoming Spotlight issue...

Our next Spotlight issue is coming in October 2016 and will include:

- Current sections
- And much more...

Do you know anybody who should be receiving this publication? Please send an email to cats@indiana.edu to be added.

Spotlight

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

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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.

Herman B Wells Library
Photo by Indiana University
Inside IU Bloomington

FULFILLING the PROMISE