Spotlight

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

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BUDGETARY ADMINISTRATION & OPERATIONS (BAO)

Campus Administrative Training Series (CATS) Knowledge Base

Knowledge Base financial activity of the month: Software Purchase Approval Process
Policy that supports this activity: Management of Institutional Data, DM-01

Questions, comments, concerns? Send us a message through the CATS website’s Sounding Board and make sure to add your name and email address if you’d like to be reached.

POLICY STATION

University Policies: Human Resources

On November 13, 2017, the following Human Resources policies were either recently revised or newly created.

- Adverse or Unsafe Working Conditions, HR-11-10
- Adverse Weather, HR-11-20
- Pandemic Emergency Policy, HR-11-40
- Premium Pay, HR-03-50
- Overtime, HR-06-30
- Holidays, HR-05-30
- Paid Time Off (PTO) for PA, HR-05-70
- Paid Time Off (PTO) for PB, HR-05-80
- Voluntary and Involuntary Separation, HR-10-40

See the “New and Recently Revised” as well as the “Under Review” tabs on the website to keep you abreast with university policies. For questions/comments about the policy process, please contact the Office of Policy Administration.
FISCAL CHECKLIST & DEADLINES

FMS Payroll: Year End Attendance Reminders - Biweekly paid Staff

The attendance year for biweekly paid staff ends with the last full pay period of the calendar year. In 2017, the last full pay period is December 30, 2017. All time-off benefit hours used thru 12/30/17 count towards 2017 usage maximums.

Any hours used beginning December 31, 2017 will count towards the maximum usage for 2018.

You should be running the BWP/BW1 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 B038120117. The Pay Period End Date = 11/18/2017

Biweekly Staff Employees (BW1):
- Any prior year holiday hours saved from 2016 must be used before December 30, 2017. Hours are listed in the column marked ‘Hol PY’.

Biweekly Professional Staff Employees (BWP):
- Any prior year holiday hours saved from 2016 must be used before December 30, 2017. Hours are listed in the column marked ‘Hol PY’.
- The PA leave plans have a max usage per year of 240 or 288 based on service years. You can review PTO hours used during this attendance year in the ‘PTO Tkn’ column. The system recalculates the remaining PTO hours that are available for use after each payroll process. The available balance is displayed in the ‘PTO Avl’ 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 30 deadline.
- Employees in PA leave plans are allowed to move up to 96 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 any PTO hours exceeding 240/288 (up to 96) to the Sick bank so they will not be lost. 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.


If you have further questions, please contact your FMS Payroll Processor.
FMS Payroll: Important Year-End Payroll Reminders for Monthly Staff

Monthly Paid Employees: Please share this information!

- The November 30 paycheck will be the final paycheck in 2017 for monthly paid faculty and staff.
- Indiana University pays the December paycheck for monthly paid faculty and staff on the first business day in January.
- The December, 2017 paycheck will be paid on Tuesday, January 2, 2018.
- Please take this into consideration if you have automatic withdrawals from your bank accounts and ensure that you have adequate funds to cover these withdrawals.

Prior Year Holidays: Staff employees need to use any remaining prior year (2016) holiday hours by the last full pay period of the calendar year.

- The date for Biweekly paid staff is December 30, 2017.
- The date for Monthly paid staff is December 31, 2017.

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

FMS Payroll: New Overpayment Authorization Form

Overpayment Standard Operating Procedure 2.0 was updated in August, 2017. The most important change for departments is a new authorization form. Departments are encouraged to have the employee complete the authorization form before submitting an adjustment voucher to recoup an overpayment. The form should remain in the department to support the adjustment transactions.

PSOP 2.0: Overpayment: [https://fms.iu.edu/payroll/policies-and-procedures/psop02](https://fms.iu.edu/payroll/policies-and-procedures/psop02)


Please review the PSOP and if you have further questions, please contact your FMS Payroll Processor.

HR Announcements - Adverse Weather Conditions

The University Human Resources’ 2017-18 Adverse Weather Conditions announcement is now available. Please distribute the announcements to your unit’s department heads and managers, as well as post the information for employees.

If you have any questions about the weather conditions during the holiday season, please contact askhr@iu.edu or 812-856-1243.
FISCAL CHECKLIST & DEADLINES (continued)

ePTO Year-End Planning Reminders

Dear ePTO Administrators:
As we near the end of 2017, we ask that you remind your monthly staff about the following ePTO items:

- Many IU offices close the week between Christmas and New Year's Day and staff must use PTO to cover this time. Staff should add these dates to their December calendars now as they're scheduling their holiday time off. Planning ahead for these dates will help ensure that staff do not reach their maximum PTO use limit prior to office closures.
- Unused 2016 holiday hours expire at the end of this year. If staff do not use these holidays, they lose them. Holiday hours don't count toward PTO use limits, so this is a great way to cover those office closures mentioned above!
  - Staff who transferred or were reclassified from Biweekly to Monthly in 2016/2017 may have available HOL accrual balances but won't have the option to use the hours in their dropdown list of time-off codes. Transferred HOL hours must be applied by our team, so please send us a support request letting us know on which day(s) they'd like to use these hours and we'll take care of it.
- Encourage staff and supervisors who are behind on calendar submissions or approvals to catch up. This helps the department avoid overpayments for absent hours that were not reported on time.
- See Year-End Pay Dates and Time-Off Accruals for Staff Employees Holiday Season December 2017 / January 2018

If you have ePTO questions or issues, please use the ePTO Support Form.

FMS - Reminder: Critical Data in KFS Training

On Monday, December 4, 2017, FMS will release a new online training. The training, called Critical Data in KFS, will be required of all KFS users.

Beginning December 4:
- ALL new KFS users will need to complete the training before their department can request KFS access on their behalf.
- Existing KFS users will have from Monday, December 4, 2017 until Monday, March 5, 2018 to complete the training.
- KFS users who have not completed the training by March 5 will have their KFS access revoked.

Moving forward, all KFS users will need to complete Critical Data in KFS on an annual basis to retain access to KFS. Users who do not complete the training annually will have their KFS access revoked.

Visit Critical Data in KFS Training for more information about the training.

Please don't hesitate to contact Elisabeth Mason or call (812) 855-5551 with any questions.

FMS - Update your KFS Bookmarks

As of Thursday, December 14, 2017, the OLD KFS URL prefix, uisapp2.iu.edu, will no longer work. Please update all your bookmarks to KFS, including to individual KFS documents, to the new prefix: apps.iu.edu

For example, if your KFS portal is bookmarked as https://uisapp2.iu.edu/kfs-prd, you will need to CHANGE IT TO https://apps.iu.edu/kfs-prd to ensure that the bookmark continues working after December 14. Note that the prefix differs between the old and new URLs.

If you continue using the old prefix after December 14, you will receive an error.

Please don't hesitate to contact Elisabeth Mason or call (812) 855-5551 with any questions.
A-21 Effort Reports

A03 Academic Summer Effort Reports were generated October 16th, routing to Fiscal Officers and then to the Principal Investigators on federal or fed pass through sponsored awards. The summer period covers academic appointments for May 1, 2017 through August 31, 2017. The deadline for review and approval is Thursday, December 14, 2017.

NOTE: IU Policy and Federal Regulations governing the administration of federal funds require that salary charges to grants and contracts be verified (which is accomplished through the effort certification document). For salary charges on federal awards that are not certified within the 60-day time period, the salaries may be deemed to be unallowable and the expenditures moved to a departmental account. The Office of Research Administration (ORA) has made several attempts to communicate this deadline to you. If an extension of time is required, please submit your request in the manner outlined in IU policy Effort Certification Under Uniform Guidance SPA-11-004.

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

A Reminder from the IUB Office of the Bursar – TPC

Third Party Contract (TPC) USERS – Please see the important dates below.

<table>
<thead>
<tr>
<th>TASK</th>
<th>DATE</th>
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<tbody>
<tr>
<td>4182 TPC lists distributed (if you do not have list e-mail <a href="mailto:blbursar@indiana.edu">blbursar@indiana.edu</a> to request a listing of the 4182 TPC)</td>
<td>11.06.17</td>
</tr>
<tr>
<td>Spring 2018 tuition and fees appear on student account (if student is enrolled for spring term)</td>
<td>11.17.17</td>
</tr>
<tr>
<td>Fee remissions begin to calculate on student accounts</td>
<td>11.18.17</td>
</tr>
<tr>
<td>Deadline for fee remission batch entry (send request to <a href="mailto:blbursar@indiana.edu">blbursar@indiana.edu</a>)</td>
<td>12.01.17</td>
</tr>
<tr>
<td><strong>Deadline for fee remission manual entry for December bill</strong> (due 1.10.18)</td>
<td>12.18.17</td>
</tr>
<tr>
<td><strong>First bill of term for Spring 2018 issued 12.21.17</strong></td>
<td>DUE 01.10.18</td>
</tr>
<tr>
<td>1st day for spring financial aid disbursement (if all eligibility tests pass)</td>
<td>12.29.17</td>
</tr>
<tr>
<td>Spring 2018 classes begin</td>
<td>01.08.18</td>
</tr>
<tr>
<td>IU Department TPC Request page turned off for AID YEAR 2018 (17-18 AY)</td>
<td>06.15.18</td>
</tr>
</tbody>
</table>

If you have questions, please email Dina Adkins, University Bursar Office.
2017 Tax Forms Available Electronically

For your convenience, year-end tax forms can be had **electronically**. Consent for electronic delivery must be provided by the recipient ahead of time [see details below]. Additionally, make sure to update your home address (both student and employee home address [if applicable]) in One.IU system:

- To update Address information in One.IU Employee Center: go.iu.edu/Personal-Info
- To sign a W-2 Electronic Consent, visit our website: go.iu.edu/W2-Consent
- International students and employees can sign a 1042-S Electronic Consent via the Foreign National Information System (FNIS).
  - To read more about FNIS: go.iu.edu/FNISHelp
  - New to FNIS: go.iu.edu/FNISLogin
  - Forgot your FNIS password: go.iu.edu/FNISReset
- To check when your forms will be available: go.iu.edu/TaxForecast

TAX TIDBIT

**New Tax Treaty Form 8233 required for 2018:**

University Tax Services has created new 8233 tax treaty forms for the year 2018. Instructions to upload (and sign) the form via FNIS were sent out via an email on Nov-09-2017 to eligible non-resident alien (NRA) students/employees. Signed 8233 forms must be submitted back to IU Tax by **Tuesday, December 12**, to ensure tax treaty benefits on your first 2018 paycheck. **For questions contact, intltax@iu.edu.**

Check out our website to read more about **International Tax Treaty Benefits** and to view the list of eligible countries.

**For assistance, please contact University Tax Services at taxpayer@iu.edu.**
Get Ready for

Over the course of the next year, three financial systems will be upgraded or replaced to add functionality and improve user experience. Watch video. The systems that will be affected are:

- the Kuali Financial System (KFS),
- the Travel Expense Module (TEM),
- and Procure to Pay (P2P) systems.

**KFS 7.0 -**

KFS will be upgraded to the latest version of its software. This upgrade will take place over the weekend of February 10-11, 2018. You can expect to see the new KFS interface beginning Monday, February 12, 2018. The functionality of KFS documents will not change. The only change to KFS, aside from some technical improvements, will be the look and feel of the system. For more information about the KFS 7.0 upgrade, including screenshots of the new system interface, please visit https://fms.iu.edu/training/kuali-financial-system/kfs-upgrade/

**Chrome River -**

The Travel Expense Module (TEM) will be replaced by a third party solution, Chrome River, in early 2018. Chrome River is an industry-leading solution in expense management. It aims to simplify the travel and reimbursement process at IU by using both desktop and mobile applications, a user-friendly interface, and enhanced receipt-capture functionality. Chrome River will also be used to reconcile Procurement Cards (P-cards). FMS and Procurement Services are working together to ensure that help documentation and training workshops will be available when Chrome River is released in the spring.

*We are excited for the next year! To keep up-to-date with Project Recharge, and for more information about the changes mentioned above, visit the Project Recharge website.*
The Spotlight staff would like to say Thank You to ALL IUB employees that retired this year.

Thank You for your dedication to IUB. Indiana University’s history and tradition is exemplary - that history is due to all of our hard working employees.

We wish you the best!
**TRAINING** 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, November 29** – 1:30–3:30pm ~ Frangipani Rm, IMU

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

<table>
<thead>
<tr>
<th>Financial Processing</th>
<th>Office of the Treasurer</th>
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<tbody>
<tr>
<td>Requires DUO authentication</td>
<td><strong>Face to Face Revenue Training</strong></td>
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<tr>
<td></td>
<td>Intended for full-time employees involved in <strong>revenue processing</strong>/access to University banking/payment card systems. Every 2 years.</td>
</tr>
<tr>
<td><strong>Financial Processing Basics 1</strong> Tuesday, December 5 9:00 – 11:30am ~ Poplars W183</td>
<td>Contact <a href="mailto:melissa.hartley@indiana.edu">Melissa Hartley</a> /812-855-2930 to schedule a face-to-face training.</td>
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<tr>
<td><strong>Financial Processing Basics 2</strong> Wednesday, December 6 9:00 – 11:30am ~ Poplars W183</td>
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<td><strong>Questions? Please contact FMS Training.</strong></td>
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<thead>
<tr>
<th>Financial Reports</th>
<th>Financial Aid</th>
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<tr>
<td>Requires DUO authentication</td>
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<tr>
<td><strong>Introduction to Financial Reports</strong> Tuesday, December 12 9:00 – 12:00pm ~ Poplars W183</td>
<td>For personalized trainings, please contact the Financial Aid Office at <a href="mailto:deptsch@indiana.edu">deptsch@indiana.edu</a>.</td>
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<tr>
<td><strong>Questions? Please contact FMS Training.</strong></td>
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<tr>
<th>Disbursement Voucher Certificate</th>
<th>FERPA Training</th>
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<tr>
<td>Requires DUO authentication</td>
<td><strong>FERPA for Staff</strong></td>
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<tr>
<td><strong>Disbursement Voucher Basics</strong> Wednesday, December 13 9:00 – 12:00pm ~ Poplars W183</td>
<td>For training contact the Office of the Registrar at <a href="mailto:registrar@indiana.edu">registrar@indiana.edu</a> / 812-855-9349.</td>
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<tr>
<td><strong>Disbursement Voucher Special Considerations</strong> Thursday, December 14 9:00 – 12:00pm ~ Poplars W183</td>
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<tr>
<td><strong>See <a href="#">FMS Disbursement Voucher Certification</a> for information on the current requirements.</strong></td>
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<td><strong>Questions? Please contact FMS Training.</strong></td>
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<tr>
<th>Capital Asset Requisition</th>
<th>Travel</th>
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<tr>
<td>This class is recommended for learning tips and tricks that will help you fill out this tab more accurately and efficiently.</td>
<td>Contact <a href="#">Travel Training</a> for dates.</td>
</tr>
<tr>
<td><strong>Thursday, November 30</strong> 10:00 – 11:30am ~ Poplars W183</td>
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<tr>
<td><strong>Questions? Please contact Joy Maddox.</strong></td>
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<tr>
<th>Fee Remission Third Party Contract (TPC)</th>
<th>Organizational Development Classes</th>
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<tr>
<td>Training for new users is offered on the <strong>2nd Tuesday of each month at 12 noon.</strong> To schedule a training session, please send an email to <a href="mailto:bursar@indiana.edu">bursar@indiana.edu</a>.</td>
<td>are online and available for registration. Contact <a href="mailto:wendy.cornwell@indiana.edu">Wendy Cornwell</a> or call 855-9674 with any questions.</td>
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<tr>
<td><strong>Fee Remission Third Party Contract (TPC)</strong></td>
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<tr>
<th>KFS Purchasing</th>
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<tr>
<td>Requires DUO authentication</td>
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<tr>
<td><strong>KFS Purchasing Training - Basics</strong> Wednesday, December 20 9:00 – 11:00am ~ Poplars W183</td>
<td><strong>Monday, December 4</strong> 2:00 – 4:00pm ~ Poplars W183</td>
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<td></td>
<td><strong>Questions? Please contact FMS Training.</strong></td>
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<tr>
<td>Contact <a href="mailto:donna.burkhardt@indiana.edu">Donna Burkhardt</a> for information.</td>
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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.

A 1930 advertisement for Indiana University.
- James Capshew’s lecture on Herman B Wells.

Upcoming Spotlight issue...

Our next Spotlight issue is coming in December 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.

Fulfilling the Promise