**Tax Tidbit**

**Disbursement Voucher (DV) and Purchase Order (PO) Workflow**

**University Tax Services** reviews Purchase Orders and Disbursement Vouchers daily in the order received to the tax manager route node. Once reviewed, any correspondence is sent to the initiator as an FYI notification through the notes function of the document. The notes section of the document is reviewed for response to the request for more information. Please be sure to send an FYI notification to ensure quick receipt of the information. This business process allows for the document to stand-alone and provides a clean audit trail for all payments.

The timeline for approval is as follows:

1. Initial review within 72 hours of receipt into the tax manager route node. Request in notes for further information is sent to the initiator in an FYI.
2. Document notes reviewed daily for response.
3. Document disapproved after 14 days of inactivity

In order to streamline the review and approval process of documents please review the FMS tax website at [https://fms.iu.edu/tax/](https://fms.iu.edu/tax/) to ensure you have provided the appropriate supporting documentation.

Some helpful tips for quick approvals are as follows:

- **Foreign vendor payments**
  - **Travel and Honorarium Payments**: Include immigration documents and a Tax Coversheet.
  - **Out of Pocket Reimbursements**: Include immigration documentation and a clear explanation of what is being reimbursed and why.
  - **Subscriptions and Goods**: Provide a clear explanation of what is being purchased.
  - **Services**: Provide a clear explanation of where the services were performed.

- **U.S. vendor payments**
  - **Independent Contractor Payments**: [Independent Contractor Questionnaire](https://fms.iu.edu/tax/).
  - **Employee Payments**: Use the employee ID number rather than the vendor ID number and include clear explanation of expense.
Route Log
The status of your document can be monitored by reviewing the route log within the Route Log Tab.

If your document is pending KFS-SYS System User approval the document is waiting on supporting documentation. Please contact Accounts Payable.

A pending approval action request with the annotation KFS-SYS Tax Manager is an indication of a current review by University Tax Services.

If your route log has an approval For Delegator Tax Manager, University Tax Services has already approved your document.

If your document requires expedited processing, please send an email to taxpayer@indiana.edu. Please include the document number, reason for expedited request, and contact information where a member of University Tax Services can reach you for additional questions.

Thank you for helping University Tax Services remain compliant and while maintaining efficient and timely processing of payments to our vendors.

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