Bloomington Campus

Budget Construction Guidelines

For

FY 2016-17

March 21, 2016

Budgetary Administration and Planning Office
Bryan Hall 007
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Deadline for submission of your budget is Monday, April 11, 2016
A. Introduction

This document, along with supplemental details contained in the attachments, provides the necessary information for preparing your FY 2016-17 budget requests. As in past years, the Budgetary Administration and Planning Office will formally review each budget to check for compliance with campus and university policies. Any deviations from these guidelines or policies must be approved by Budgetary Administration and Planning.

Our focus in developing this budget is, as always, the responsible stewardship of IU’s resources. Each of us is accountable for how we allocate these funds and our decisions should be guided by our continued focus on student affordability and supporting excellence in our core missions of teaching, research, and service. The budget should be a template of the plans for the upcoming year as units should strive for aligning budgets closely with planned activities. Aligning unit priorities with campus strategic goals will further enhance our ability to leverage the collective assets of the campus, create efficiencies in implementation, and foster connections among units and systems that can lead to improved outcomes for students and faculty.
B. Salary Policy and Benefit Rates for Fiscal Year 2016-17—All Fund Groups

Indiana University
Salary Policy for Fiscal Year 2016-17—All Fund Groups

The salary policy for fiscal year 2016-17 provides guidelines for salary setting that support the objective of optimizing the university’s ability to continue to attract and retain outstanding faculty and staff talent, while providing flexibility for funding for strategic initiatives. A focus on faculty salaries is critical. Each unit, however, should also make ample provision for salary increases to key professional staff members and for employees in competitive job markets.

The salary policy is predicated on an overall budget framework without structural deficits.

- A campus (with VPCFO approval) or responsibility center (“RC”) (with campus approval) may elect, given its priorities and resource constraints, to set a salary increase pool lower than noted in this policy.
- Each campus and RC average base salary increase pool is limited to 2.5%, for continuing faculty and staff. The pool is to consist of a 1% baseline increase, assuming performance of the employee meets the base level required by the position. In addition, the policy provides for a remaining allocation of UP TO 1.5% to cover equity, merit and notable performance, promotion/reclassification, higher level responsibilities and retention. There are two pools, one for faculty and one for staff. Faculty salary increase must be equal or greater than staff.
- The policy provides for an exception for individuals excluded from the average for the following TWO reasons ONLY (please code for exclusion every funding line with the reason code and calculated amount of the exclusion):
  a. NTN – Newly-tenured faculty.
  b. PRO - Faculty receiving promotion in rank or newly named as Distinguished Professors.

- A list of inculadable reason codes is provided below. Please code every funding line with the reason code and calculated amount of the reason. The use of these codes will NOT exclude an increase from the salary average increase calculation. Rather, it is important to capture this detail for human resource management:
  a. EQU – Gender or ethnicity equity increases approved by University Affirmative Action prior to March 14, 2016.
  b. EQY – Market or other salary equity issues not handled through the normal mid-year increase process and approved by University Human Resources for staff employees.
  c. ERR – Existing base salary data error; including problem with CSF tracker.
  d FYS – Fiscal year supplement (bi-weekly staff above the maximum salary range)
  e. HLR – Employee assigned significant higher-level responsibilities within the same rank. The use of HLR requires the approval of the school/department management and...
University Human Resources. HLR increases may not exceed the top of the associated salary range maximum and may not increase the salary of the recipient to a level that creates an internal salary equity or salary compression issue.
f. INS – Insufficient Funds.
g. INT – Employee salary increases mandated by the Department of Labor.
h. LTS – Limited Term Staff appointments.
i. MID – Employee received a mid-year approval for a salary increase.
j. MYR - Written agreements completed prior to March 14, 2016 that include a salary increase for FY 2016-17. Please send a copy of the individual’s contract.
k. NEW – New hire.
l. PER – Performance.
m. RCL - Staff either (a) reclassified to a higher rank, or (b) promoted to a different position of higher rank.

- Salary increases for faculty and professional staff should be based on individually determined merit and performance. In this regard, please provide Joan Hagen (jhagen@iu.edu) with a brief summary of your campus’ salary-setting strategies and indicate how the strategies align with the goals of Indiana University. An important element in these strategies should be a focus on the distribution of salary increases, particularly for faculty, to show that available dollars are not being spread evenly across all salary lines. University priorities should be addressed in salary decisions, subject to resource availability and, for professional staff, to established salary structures.

- Wage increases for Support and Service Staff not covered by a union are to be based on merit and performance.

- The minimum wage rate for all benefits eligible support and service staff will be $10.15 per hour. Minimum wage for all temporary hourly employees will be increased to $10.15 per hour.

Because the salary policy does not hold individual professional staff salaries to a certain percentage increase, it is anticipated that the need for midyear salary adjustments will be minimal during 2016-17. It is expected that the following types of salary increases will be limited to budget construction:

- Merit increases
- Reclassifications (RCL) that result in a gradual increase in complexity and scope within the current position number that still might result in a change in a level, job family, or job code
- Higher level responsibilities (HLR)
- Market comparisons – both internal and external (EQY)

There are situations that arise outside of budget construction that might warrant an out-of-budget construction adjustment. These include:

- Internal recruitment that results in a change in position number
• Reclassification (RCL) where significant duties are added such that the scope and complexity of the position are notably and essentially different, resulting in a change in level, job family, or job code
• Legal requirements such as Visas (H1B)
• Equity Affirmative Action (EQU)
• Counter offers

Some schools and units experience more out-of-budget construction adjustments than others. These are encouraged to set aside an additional reserve to meet these salary adjustments and reclassification requests.

The lack of a percentage maximum does not guarantee campus or university approval of proposed salary increases. Units must be able to justify large salary increases, no salary increase, or salary decreases for individual employees. All salary increases should be covered by existing unit budgets. Resulting salaries should be commensurate with those of similar job ranking across the university.

The salary increase pools for employees represented by unions will provide for an overall average of 2%.

Temporary Faculty will be budgeted and not picked up by CSF. The Temporary - Hourly will NOT be budgeted or picked up by CSF.

Faculty salary average MUST be higher than staff average.

For any salary increases greater than 8%, 0%, or less than 0%, please provide written justification (and entries need to be identified and coded as such) to Rozzie Gerstman (gerstma@iu.edu) at 855-1123.

Make sure that each percentage of salary increase is reflected on a specific funding line. Make sure to include reason code on every account that is impacted by a salary increase.

As always, please do not share salary recommendations with employees prior to Trustee approval of the FY 2016-17 budget.

1. All Funds Budgeting – Compensation Documents

(a) Budgeting Limited Term Full Time Staff Appointments:  

(b) Budgeting Non-Permanent Full Time Academic Appointments:  
2. Faculty Salary Minima

Faculty salary minima shall follow the campus salary guidelines in determining what the average salary increase should be. This is based on FY 2016-17 salary guidelines.

For 2016-17, the recommended minima are:

LI/IRX1 $63,555.43  Full Professor/Librarian
LI/IRX2 $51,979.55  Associate Professor/Librarian
LI/IRX3 $41,400.34  Assistant Professor/Librarian
LI/IRX4 $38,491.00  Instructor/Affiliate Librarian/Lecturer
3. Employee Benefit Rates for 2016-17

All Fund Groups

Table 1: Employee Benefit Rates for 2016-17*

<table>
<thead>
<tr>
<th>Benefit &amp; Object Code</th>
<th>Rate</th>
<th>Calculation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Insurance/Fee Courtesy 5625</td>
<td>19.27</td>
<td>Based on the anticipated budget level for salaries of academic staff, professional staff, and clerical and service staff.</td>
</tr>
<tr>
<td>FICA 5760</td>
<td>6.93</td>
<td>Based on the total salary and wages budgeted that are subject to FICA.</td>
</tr>
<tr>
<td>Retirement Exempt 5772</td>
<td>13.68</td>
<td>Based on the total participants budgeted salaries.</td>
</tr>
<tr>
<td>(PERF) Retirement Non-Exempt 5773</td>
<td>12.57</td>
<td>Based on the total participants budgeted salaries and those wages budgeted in PERF hourly, object code 3050.</td>
</tr>
</tbody>
</table>


4. NIH Salary Limitation

Effective January 10, 2016, the Executive Level II Pay Scale was increased, therefore increasing the NIH Salary Limitation from $183,300.00 to $185,100.00.


The increased salary limitation is effective on all new and existing DHHS awards subject to the Executive Level II Pay Scale beginning January 10, 2016.

More information regarding the DHHS Salary Limitation at Indiana University can be found at the following link:

http://www.researchadmin.iu.edu/GrantContract/gc-gfo/gfo_effort.html

Please contact Tim Burris (thburris@iu.edu) or Rayna Amerine (ramerine@iu.edu) if you have any questions.

5. Salary Setting: Budgeting 2480 & Non-Union 2500

Salaries requests for non-union support staff should be set by the department/school. These positions include Confidential, (GS) General Supervisors,
(NU) Nurses, (NA) Nursing Assistants, and some (TE) Technical positions physically located on other campuses but paid on a BL account.

The hourly rate is the basis for calculating increases for all employees which are paid bi-weekly. This also includes the PAO & PAU classifications.

Bi-weekly employees should have the same hourly rate regardless of how many accounts support their salary.

Employees can have different hourly rates only if they are paid from more than one position number.

If you have any questions, please contact Rozzie Gerstman or Patti Quimby.

6. ERIP Savings Account

The Early Retirement Incentive Plan 2013 (ERIP-2013) was implemented to support the university’s and Bloomington’s commitments and to respond to various fiscal and organizational challenges. Each RC is responsible for maintaining their ERIP Savings Account to track Strategic Savings. The remaining base budget in your ERIP Savings Account should be budgeted for FY 2016-17 in object 7900 sub-object E13.

If use of funding is requested, please complete the “Request for ERIP Strategic Account Spending” document (see page 30 in the Appendices). Please complete if there is an immediate need for budget preparation for July 1. Approvals will be required before the end of budget construction.

Justification forms and instructions can be found on the CATS and OBAP website. Please submit requests to Aimee Heeter at aheeter@indiana.edu.

C. Academic and Staff Information

1. Faculty Administrators Policy (via IU Trustee Policy: June 30, 2004)

The following policy applies to Vice Presidents, Associate Vice Presidents, Assistant Vice Presidents, Chancellors, Provosts, Vice Chancellors, Vice Provosts, Associate Vice Provosts, Assistant Vice Provosts, Deans, Associate Deans, Assistant Deans, Directors and other administrative positions as identified by the Chancellors, Provost or President – who were not in one of these positions on June 30, 2004. It shall be used to determine the salary of individual who holds both a faculty and administrative position when the individual relinquishes or is removed from the administrative position.

At the time an individual assumes both faculty and administrative positions, a memorandum shall be created that sets forth the 12-month salary of the individual. A
determination shall then be made by the appointing official that establishes the portion of the salary that shall be considered the faculty component of the individual’s salary and the portion of the salary that shall be considered the administrative component of the salary. From year to year, as raises may be given, the raises shall be apportioned between the faculty component of the salary and the administrative component of the salary. These figures shall be maintained by the appointing official with a copy provided to the faculty member/administrator and to the appropriate campus faculty records office.

At such time as a faculty member relinquishes or is removed from the administrative position, the faculty member’s salary shall return to the faculty component of the salary and the faculty member shall no longer be entitled to the administrative component. In addition, the faculty component of the salary, shall revert to the ten-twelfths (10/12) of the faculty component if the individual returns to an academic year teaching position.

**Procedure**

The procedure for calculating and budgeting the faculty salary for individuals who are taking on an administrative role will have two components for their salary.

The first component is the traditional 12-month base budgeted on object code 2000. The second component is tied to the “administrative” role, which will be budgeted on object code 2000, sub-object code ADM.

**Option 1 example, for salary increases 15% or greater:**

**Step 1:**
Faculty A, $150,000/10 ($15,000/mo.) change to 12- month, becomes $180,000 ($15,000/mo.)

**Step 2:**
Official sets the “new” base to be $220,000/12 months ($18,333/mo.)

**Step 3:**
ADM to be 15% of $220,000, $33,000

Salary View:
Object code 2000, $187,000 [$220,000 - $33,000], 85% and Object Code 2000 ADM, $33,000, 15% ($18,333/mo.)

RETURN to FACULTY:
Remove ADM, $33,000

[$187,000/12 mo. ($15,583/mo.); $15,583 X 2 mo. = $31,166; $187,000 - $31,166 = $155,834]

Return to 10-month salary level, $155,834 ($15,583/mo.)
Option 2 example, for salary increases less than 15%:

Step 1:
Faculty A, $150,000/10 ($15,000/mo.) change to 12-month, becomes $180,000 ($15,000/mo.)

Step 2:
Official sets the “new” base to $201,600/12 months

Step 3:
ADM to 10% of $201,600, ($20,160/mo.)

Salary View:
Object code 2000, $181,440, 90% and Object Code ADM, $20,160, 10% ($16,680/mo.)

RETURN to FACULTY:
Remove ADM, $20,160

$201,600 - $20,160 = $181,440/12 ($15,120/12 mo.)

Return to 10-month salary level, $151,200 ($15,120/mo.)

2. PAO/PAU & Overtime Expenses

Effective July 1, 2005, PAO and PAU positions salary request will be budgeted using object code 2480.

For overtime (hours worked > 40 hrs. in a work week) purposes, please use the following object codes and rates:

PAO positions: OT rate is 1.5, use object code 3200
PAU positions: OT rate is .5, use object code 3205

3. Staffing Adjustments
   All Fund Groups

   All Fund Groups except Contract & Grant

(a) Vacant Positions: Vacancies create an opportunity to examine your unit’s operational needs, if positions are not going to be filled in the near future you should delete that position and use the base funds to reallocate to meet other priority needs. Note: Deleting the record in budget construction only removes funding. The position is still “active” until a Maintain Position e-doc is processed to change its status.
(b) **Budgeting Vacant Positions**: Vacant positions must be budgeted with the desired amount for a planned future hire, otherwise, the minimum amount for that vacancy rank is to be budgeted.

## 4. Split Appointment

**All Fund Groups**

When budgeting salaries for employees who are split funded between accounts, Responsibility Centers, and/or Campuses;

Make contact with the appropriate individuals to discuss the distribution of salary and funding percentages for employees that you share so that everyone has the same understanding. This open communication will improve the accuracy of the salary submission and reduce the need for campus follow-up. A new feature available in KFS allows view only access of the other portion of a split employee’s salary and percent of funding. We trust the ability to view this information will be a valuable tool for users during the salary setting process.

When entering the salary request and percent, the amounts entered must mathematically agree based on the total salary/fte for the employee on each account.

The Total Intended field can be used as a communication tool between RC’s for split-funded employees to reflect the proposed annual salary and fte. The field can also be used for those employees whose total funding will be budgeted less than 100%.

Note: Because an employee’s benefits can be affected when their appointment drops below 100%, please contact the appropriate Human Resources office if additional guidance is needed.

Questions can be directed to Rozzie Gerstman (gerstma@iu.edu) and Patti Quimby (pquimby@iu.edu).

## 5. Summer Session Allocations

**General Fund Only**

Where necessary, instructional RC’s are responsible for providing salary and fringe benefit increases to its summer faculty and summer SAA appointments. Use object 2010 for Salary Plan AC1, 2310 for AC2, and 2370 for AC3, AC4 & WSG.

## 6. Strategic Hiring Program

**General Fund Only**

Strategic Hires base funding will be provided for the FY 2016-17 post-July 1, 2016. Please indicate on the hiring e-doc, place in the notes section that the hire is part of the Strategic Hiring Program. This allows us to transfer the base and current funds as soon
as possible. During budget construction, budget the amount you expect to receive from the campus, use sub-object code 2003.

7. Dual-Career Hiring

BL Campus funding support for approved Dual Career (Spousal Accommodation) appointments will be transferred post July 1, 2016. Cash support is based upon the original hiring amount per percentages outlined in the agreement. A funding pattern such as 75% Year 1, 50% Year 2, and 25% Year 3 is common, however, variations do occur. Please note on the edoc if the HIRE is Dual Career and attach any supporting documentation.

Please direct questions to Rozzie Gerstman (gerstma@iu.edu) or Patti Quimby (pquimby@iu.edu).

8. Distinguished Professors

President McRobbie selects distinguished professors at IUB and IUPUI. The Distinguished Professor title becomes effective January 1. The President provides $10,000 in funding which remains unchanged throughout employment (no incremental increases). This title and funding shall remain with the named individual until their termination from the university. The $10,000 base funding will be reflected annually during budget construction via one of the President’s accounts. Each school may provide research funds if they so choose.

Please direct questions to Rozzie Gerstman (gerstma@iu.edu).

9. Rudy Professors

The Provost identify IUB Professors to receive the title of Rudy Professor. This title remains with the individual until their termination from the university. Annual funding of $10,000 will be transferred into the individual’s specific Rudy Professor (23 account) to be used for compensation or research expenses.

Please direct questions to Rozzie Gerstman (gerstma@iu.edu).

10. Budgeting C&G Accounts

The Salary Policy for FY 2016-17 applies to employees in ALL fund groups. Those funded in whole or in part by Contract & Grant (C&G) accounts are NOT exceptions to the policy; therefore, salary increases will be given during budget construction, not on the employee’s anniversary date.
11. Expiring C&G Accounts

Contract and Grant accounts may expire between budget construction and the KFS budget load in late June. Do not request extensions or underwrites to extend the grant account beyond July 1.

If the grant account has another year of funding which is expected to arrive prior to July 1, set the employee’s salaries using the current C&G account during budget construction. If the new account is active prior to the budget load, the system will automatically load the salaries to the new account.

If the grant funding ends prior to July 1, with no future project funds expected, the system will load the employees budgeted salaries to the department’s continuation account. ORA will review the budget construction data prior to the budget load and work with departments to resolve employees budgeted to expired projects.

Fringe benefits are not calculated on the budgeted salaries in C&G accounts.

Do not budget hourly expenses in C&G accounts.

Do not budget vacant positions or non-salary expenses such as supplies, travel, and equipment.

D. General Budget Information and Overview of Special Resources

Budgeting Faculty Research Funding/Spending: https://fms.iu.edu/afb/wp-content/uploads/2016/02/AFB-Business-Practice_Budgeting-Faculty-Research-Funding_Spending.pdf


1. General Funds ONLY

   (a) Unbudgeted Income, Instructional RCs:

   Your 2015-16 budgets must use only the income shown on the Budget Information Sheet. Use of unanticipated and unbudgeted income received during the year will not be permitted without prior discussion with the Budgetary Administration and Planning Office. If you have any questions, please contact Aimee Heeter at 5-0117.
Incidental Income will be loaded into your accounts when budget construction is available. **Income and ‘transfers in’ (9915 object code) amounts should not be changed.**

(b) **Budgeting the Use of Reserves (Fund Balances):**


(c) **Undergraduate Fee Income for RCs:**

Tuition income related to the “tuition reserve” will be distributed to the units based on the undergraduate fee income distribution model implemented in FY 2015-16. Funding will be distributed to the appropriate RCM 87 accounts.

(d) **Income:**

Undergraduate Fee Income distribution is based on three years per term. One-third of the distribution is predicated on actual credit hours for 2016-17. Therefore, full distribution of fee income will not occur until after the full-refund period for 2nd 8 week courses.

Do NOT add or change income object codes, IUF or otherwise, in budget construction.

Questions should be directed to Aimee Heeter at 5-0117 or Rhea Freeman 6-2736.

2. **General and Non-General Funds**

(a) **Budget Alignment and Sufficient Funds Checking:**

The difference between budgeted and actual expenditures should be comparatively small; consequently, budgets should conform as closely as possible to realistic projections of expenditure patterns. Additional funds for chronically overspent lines should be provided through internal reallocations during budget construction rather than waiting until later in the year. The goal should be to allocate funds at appropriate levels during budget construction. This approach will help avoid delays that result when transactions are rejected during sufficient funds checking.

(b) **Budgeting Non-General Fund Accounts:**

Non-general fund accounts must be budgeted if they have (a) annual revenue source greater than $30,000 (recurring) and (b) employees with a CSF record.
Please budget anticipated transfers-in as a negative expense using the appropriate transfer object code.

The expenditure budget must balance with the revenue.

3. **Contingencies and Unallocated Funds**


   Units will be requested to provide details regarding reserve funding. If negative reserves are built into the budget, additional information will be requested regarding coverage by year-end FY 2016-17. Details should be provided to Aimee Heeter (aheeter@indiana.edu) with your narrative.

4. **Auxiliary Accounts**

   Auxiliary account budgets should be realistic and constructed so that the year-end operating margin is breakeven or positive. Budgeted income should be equal to or greater than budgeted expense and the budgeted expense should include depreciation. Any budgeted loss needs prior approval from the Budgetary Administration and Planning Office. If you have any questions, please contact Julie Bauters at 5-1126.

   **ERIP HRA for Auxiliary Fund Group ONLY:**

   As part of the Early Retirement Incentive Plan (ERIP), employees that were approved receive a credit to an HRA (health reimbursement account) for 5 years. In order to ensure consistency in the accounting of these transactions, each auxiliary and service department who had employees that took advantage of the ERIP plan should budget the HRA in object code 4589.

5. **Base Budget Adjustments**

   **General Fund Only**

   All adjusted base changes from July 1, 2015 are reflected on the allocation sheet. This includes changes to student fee income, state appropriations and assessments.

   During the year, please contact Aimee Heeter 5-0117, or Rhea Freeman 6-2736 for approval.

6. **Assessments**

   **General Fund Only**

   The algorithm used for assessment costs are: total credit hours, tenure track FTE, other employee FTE; assignable square footage. University tax is calculated on the basis of net direct expenditures (3-year average). For FY 2016-17, the University Tax
model is frozen based on the net direct expenditures (3 year average) used in FY16. A new algorithm for university tax assessment is being developed. The OBAP website (http://www.indiana.edu/~obap/) will be updated by April, 2016 with additional details. Costs per Driver will be circulated to all academic units as well as uploaded to the Budget Construction website.

If you have any questions, please contact Aimee Heeter 5-0117.

7. Legal Services

Legal services providers must be approved by the Office of the Vice President and General Counsel. Expenditures for legal services may be made only in accordance with guidelines established by that office.

8. IU Tuition Benefits (Fee Courtesy)

The fee courtesy file for FY 2016-17 will be posted to the CATS Knowledge Base when available (see link below). This data was obtained from CSF tracker position information reflected in FY 2014-15. The non-general funds accounts will be charged using object code 9956, sub-object code DFC. These amounts should be budgeted within the accounts as listed to accommodate the fee courtesy batch billing which will be initiated in July or August 2015.


E. Student Information

1. SAA and Fellowship Health Insurance

All Fund Groups

Academic RC’s are expected to cover the SAA health insurance premium for eligible student academic appointees and fellowship holders who are funded in BOTH general and non-general accounts. A Campus account will cover the SAA health insurance premium for eligible student academic appointees and fellowship holders paid from GENERAL accounts for Support RC’s. Support RC’s must budget funds to cover charges to their applicable NON-GENERAL fund accounts only. Use object code 5610 for this purpose. Object Code 5610 will be used for both Fellowships and SAA’s for FY 2016-17.

The Student Health Insurance Plan is mandatory for all Student Academic Appointees (SAAs) who are appointed at: (1) 37.5% FTE for the Fall and/or Spring Semester, and Fellowship Recipients with an award of $3,609 or more per semester for FY 2016-17. All SAAs and Fellowship Recipients must be enrolled in a minimum of six credit hours or G-901 each semester (Summers excluded). Premiums for SAAs and
Fellowship Recipients are fully subsidized by the University or external granting agency.

In FY 2014-15 plans for SAAs and Fellowship Recipients transitioned from fiscal year to calendar year. 2017 premiums will not be known until August or September, however, units should anticipate a 5% increase in premiums for calendar year 2017. The rates to budget for FY 2016-17 are listed below with Spring 2017 as an estimate only. Note that although premium rates are currently the same for SAAs and Fellowship Recipients, they are on two separate plans so there is no guarantee rates can be kept the same between the two groups.

The semester breakdown for FY 2016-17 is:

<table>
<thead>
<tr>
<th></th>
<th>SAA-FEL 2016-17 Premium Rates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td></td>
</tr>
<tr>
<td>Fall 2016</td>
<td>$1,243.43</td>
</tr>
<tr>
<td>Spring 2017</td>
<td>Anticipate 5% increase</td>
</tr>
<tr>
<td></td>
<td>$1,827.84</td>
</tr>
<tr>
<td>Total</td>
<td>$3,071.27</td>
</tr>
</tbody>
</table>

2. Matching Programs
   Matching the Promise
   Bicentennial Campaign
   Overseas Studies

Budget only if the match begins July 1, 2016 or is currently being matched. Budget the match from the campus in 9915 negative amount, if you plan to spend the interest income at IUF budget as revenue using object code 1179. The match funds will be budgeted under object code 9958.

Please direct questions to Rozzie Gerstman (gerstma@iu.edu).

3. Stipends for Student Academic Appointees
   All Fund Groups

FY 2016-17 minimum rates, $9,625.00 for 10 months (AY) for 0.50 FTE (20 hrs./per week).
F. Specific Expenditure Information

1. Parking Charge for AFSCME Employees (object code 4210)  
   All Fund Groups

Employees covered by the AFSCME union are entitled to a free C permit, or the equivalent value applied towards the purchase of an A permit. To cover this benefit, departments are charged a fee of $132 per AFSCME employee. The charge is processed once a year, in the Fall, on a service billing document.

2. Postage  
   All Fund Groups

First-Class letters up to 1 ounce will remain at 49 cents.

Postcard postage will remain at 35 cents.

There may be a variety of rate changes for other mailing services, including standard mail, periodicals, packages, and extra services.

For a complete listing of all the rates in effect, please visit the following link https://postcalc.usps.com/

If you have any questions, please contact Mail Services at 855-3503 or jumail@indiana.edu.

3. Travel Allowances (object codes 6000-6280)  
   All Fund Groups

Effective January 1, 2016, all fund groups except 47 accounts are reimbursed at $0.54 for the first 500 miles and then $0.27 from mile 501 through 3,000. This information can be found at: http://www.indiana.edu/~travel/traveling/travelingbycar.shtml#mileage

Effective May 1, 2011, all 47 accounts are reimbursed at $0.44 for the first 500 miles and then $0.22 from mile 501 through 3,000.

See the Travel Management Web Site (http://www.iu.edu/~travel/) for more information.
4. Minor Repairs & Maintenance (object code 4700)
   All Units
   All Fund Groups

If facility repairs or maintenance are planned for FY 2016-17, they should be budgeted. Funds to cover these costs should be reallocated within your FY 2015-16 available resources. Repairs and maintenance amounting to $75,000 or less need to be budgeted for in object code 4700. These types of repairs are primarily intended to improve the aesthetic look of space or are “maintenance” of space. This includes painting a room, small area carpet replacement, replacement of consumables, or localized repartitioning etc. Note: VPCPF approval of these types of projects is necessary before the project can move forward.

5. Repairs and Rehabilitation (R&R)
   Auxiliary Units Only
   Non-General Fund Groups

Any auxiliary enterprises and service unit that has primarily funded and/or occupies a significant portion of one or more university owned buildings is required to set aside annually at least 1.25% of the facility replacement value of the building(s) for projects defined as R&R. Service center accounts have an additional restriction that the amount transferred cannot exceed the annual depreciation amount of the building(s).

Detailed schedules were sent to each campus in March.

Contact Auxiliary Accounting at auxacct@iu.edu with any questions.

6. Equipment
   All Fund Groups

Option 1: Equipment

Please refer to Standard Operating Procedure CSOP 8.0 Capitalization of Movable Equipment for guidelines relating to the capitalization of moveable equipment, and object code assignment.

Option 2: Capital Equipment

Capital equipment purchases are equipment items with an acquisition value of at least $5000.00, and a useful life of one year or greater. The account number that is used to purchase a capital asset dictates the object code that should be chosen on the requisition. To ensure the correct object code is used, answer the following questions concerning the account number that purchased the
1. Is asset being purchased on a grant account?
   - NO – Use university funded object code.
   - YES – Go to question #2.

2. Is the sub-fund group code of the account begin with FED*?
   - NO – Go to question #3.
   - YES – Go to question #4.

3. Is the account’s federal pass thru indicator “Y”?
   - NO – Use university funded object code.
   - YES – Go to question #4.

4. Does the granting agency hold title to the asset?
   - NO – Use federally funded object code.
   - YES – Use federally owned object code.

**University Funded Object Code**

A university funded object code should be used for assets purchased by non-grant accounts.

7000   Capital Equipment
7015   Computer Equipment

**Federally Funded Object Code**

To determine if a federally funded object code should be used on a purchasing requisition or financial document if the account has either of the following attributes:

**Account sub-fund group code:** If the sub-fund is like (FED*) then a federally funded object code should be used. To determine the sub-fund group code, go to Account Lookup in KFS and enter the account number and search. The sub-fund group code is presented in the search results. If the sub-fund is like “Fed*” then use a federally funded object code.

**Federal Pass thru Indicator:** For assets purchased on federal pass thru funds, the federal pass thru flag on the account/award should be checked. When the “federal pass thru flag” is set to “Y”, a federally funded object code should be used. To view the subfund group code and the federal pass thru flag go to UIIE and run the “Find Federal Pass Thru Indicator” report for the chart and account. The report can be found in Kuali Financial/Chart of Accounts file folder. An example of the report output is below:
Federally Owned Object Code

A federally owned object code should be used when the granting agency holds title to the asset. This can be determined by a review of the Award Summary report sent to the organization. The Award Summary report is created upon setting up the award and is normally sent to the fiscal officer, or delegate, and the PI.

7031 Capital Equipment – Federally Owned
7036 Computer Equipment – Federally Owned

On the Details & Dates panel, there is a subpanel called “Sponsor” which shows the sponsor ID and name, as well as the pass-thru or “Prime Sponsor”. The presence of a CFDA number is also an indicator of a federal project.

Ownership information may also be obtained from the KC Award in Kuali Coeus (KC) Grants. The award number can be found in KFS in the awards tab of the account lookup. Use this number to find the Award in Kuali Coeus (KC) Grants. After opening the award go to the “Comments Notes, and Attachments” tab. If the grant or agency holds title, it should be noted here. If no information is available, please contact the Office of Research Administration.

Other Owned Object Code

Other Owned should be used when the title to the equipment is not vested with IU. An example would be a purchase funded by the State of Indiana, with the equipment returned to the State agency once the project has closed. To determine if an Other Owned object code should be used, follow the same steps in the Federally Owned object code above.

7032 Capital Equipment – Other Owned

The Office of Research Administration will assign a federally owned or other owned object code when appropriate.

University Funded Object Code

A university funded object code should be used for assets purchased by non-grant accounts.
7000  Capital Equipment
7015  Computer Equipment

**Federally Funded Object Code**

To determine if a federally funded object code should be used on a purchasing requisition or financial document if the account has either of the following attributes:

**Account sub-fund group code**  If the sub-fund is like (FED*) then a federally funded object code should be used. To determine the sub-fund group code, go to Account Lookup in KFS and enter the account number and search. The sub-fund group code is presented in the search results. If the sub-fund is like “Fed*” then use a federally funded object code.

**Federal Pass thru Indicator**  For assets purchased on federal pass thru funds, the federal pass thru flag on the account/award should be checked. When the “federal pass thru flag” is set to “Y”, a federally funded object code should be used. To view the subfund group code and the federal pass thru flag go to IUIE and run the “Find Federal Pass Thru Indicator” report for the chart and account. The report can be found in Kuali Financial/Chart of Accounts file folder. An example of the report output is below.

<table>
<thead>
<tr>
<th>Chart</th>
<th>Account</th>
<th>Federal Pass Thru Indicator</th>
<th>Sub Fund Group Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>BL</td>
<td>4025900</td>
<td>Y</td>
<td>HIEDUF</td>
</tr>
</tbody>
</table>

7030  Capital Equipment – Federally Funded
7035  Computer Equipment – Federally Funded

**Federally Owned Object Code**

A federally owned object code should be used when the granting agency holds title to the asset. This can be determined by a review of the Award Summary report sent to the organization. The Award Summary report is created upon setting up the award and is normally sent to the fiscal officer, or delegate, and the PI.

7031  Capital Equipment – Federally Owned
7036  Computer Equipment – Federally Owned

On the Details & Dates panel, there is a subpanel called “Sponsor” which shows the sponsor ID and name, as well as the pass-thru or “Prime Sponsor”. The presence of a CFDA number is also an indicator of a federal project.

Ownership information may also be obtained from the KC Award in Kuali Coeus (KC) Grants. The award number can be found in KFS in the awards tab of the
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**Other Owned Object Code**

Other Owned should be used when the title to the equipment is not vested with IU. An example would be a purchase funded by the State of Indiana, with the equipment returned to the State agency once the project has closed. To determine if an Other Owned object code should be used, follow the same steps in the Federally Owned object code above.

7032  Capital Equipment – Other Owned

The Office of Research Administration will assign a federally owned or other owned object code when appropriate.

If you have any questions regarding how a purchase should be handled (e.g., if it should be considered a capital asset), please email capasset@iu.edu.

**7. Fire and Casualty Insurance**

*All Fund Groups*


**8. UITS Rates for Direct Billing**

*All Funds Groups*

For FY 2016-17 UITS Rates are not available as of the date of this document, refer to [http://uits.iu.edu/page/apjw](http://uits.iu.edu/page/apjw) for viewing the updated rates when available.

**9. Life Cycle Funding for Desktop Equipment**

*General Fund Only*

IU maintains full life cycle funding for faculty and staff desktop computers, servers, and peripheral equipment for units supported by general funds. Desktop lifecycle replacement funding should be budgeted using object code 9940, sub object code LCF, rather than 5216 as has been used in prior years.

Operational details in FY 2016-17 will be the same as in FY 2006-07. During FY 2015-16, you will be required to transfer funds from your 10-XXX-98 account into your 92-XXX-98 equipment replacement account either (a) when funds will be spent; or (b) no later than June, regardless whether the funds will be spent before the end of the fiscal year or accumulated for future use. All unspent funds in the equipment
replacement accounts will be carried forward to the next year. If you have questions about this, please contact Rozzie Gerstman (gerstma@iu.edu) at 5-1123.

10. Employment Eligibility Verification and Background Checks--Object Code 4871

From I-9/Employment eligibility verification (EEV) and criminal background checks for IU employees must be completed utilizing the web-based enterprise system, GIS. In addition, criminal background checks are required for some students and volunteers.

Departments are charged for criminal background checks. The base cost for each criminal background check is $20.00. The actual cost to the department may be higher due to additional charges, such as ordering an education report, court fees, state required notifications, etc. Larger units should take this into consideration when formulating their budgets. The criminal background check includes a criminal history and Sex & Violent Offender registry checks. The cost of the Form I-9/EEV checks is included in the criminal background check charge. There is no separate charge for the Form I-9/EEV process.

Additional information regarding criminal background checks and the Form I-9/E-Verify process can be found on the UHR website at: http://hr.iu.edu/eev/index.html

In addition to the above, note the policy pertaining to Indiana University programs which involve children: http://policies.iu.edu/policies/categories/administration-operations/public-safety-institutional-assurance/PS-01.shtml

11. **President’s Fund**

Continue to budget in the President’s Fund in the respective RC 10-XXX-87 account, under object code 9977, sub object to be used is PFU. Note that the amount previously budgeted remains the same for FY 2016-17.

12. Faculty Endowment Match Program

Each unit has the responsibility of providing matching funds for endowed chairs or professorships. Matches must be made on accounts that have received contributions. In cases of an irrevocable deferred bequest, matching funds will be provided once all signatures are in place and the agreement becomes effective. Units receive a report from the UBO that provides information about the amount of matching funds that should be budgeted (Object code 9915-PRS and Object code 9915-SCH). In cases where accompanying funds exist at the foundation, the units will also be apprised of the projected amount of income they may budget in Object code 1179.
13. Budget Construction Documents

The “Budget Construction Reference Guide” can be found at the following URL: https://fms.iu.edu/files/6714/0061/4076/Budget-Construct-KFS-Training-Doc.pdf

The “Budget Construction Import Guide” can be found at the following URL: https://fms.iu.edu/files/9914/0061/4075/Budget-Construction-Import-Guide.pdf

The Budget Construction website (Allocation Sheets, Guidelines) can be found at the following URL: https://apps4.indiana.edu/VPGA_BudgetConstruction_V1_Online/Default.aspx

14. “Reports to Run BEFORE you say you’re done…”

Location- Budget Construction Selection Screen, org report/dump, use the Organization Sub-Tree and the Action arrows to locate your school/org

List 2Plg – 2plg is a mechanism which temporarily keeps the account’s budget in balance during salary setting. Open the account(s) and determine if you need to adjust the budget, then delete the 2plg entry. All plg entries must be deleted prior to the RC being pulled up by the campus.

Payroll Synchronization Problems- this report reflects instances where information in PeopleSoft no longer agrees with the information in Budget Construction. Example: a Maintain Position E-doc processed which changed an attribute of a position already budgeted in BC.

15. Planned Use of Reserves and Budget Narrative

1. For FY 2016-17, please provide a list of your current FY 2015-16 Planned Uses of Reserves for FY 2016-17. For FY 2016-17, you MUST include a narrative related to ALL FUNDS as this will be part of the Trustee’s presentation.

2. For the FY 2016-17 Budget Narrative include the following:
   a. Address student affordability and debt.
   b. Increase operating efficiencies on both the administrative and academic enterprises. This must include specific operational efficiencies, how they were achieved and the overall impact on the unit base budget.
   c. Mitigate the pressures from our stressed revenue streams.
   d. Details on negative budgets. Please include the account number, account name, object code, sub-object (required) and amount. In addition, please
provide a general description of the purpose and coverage/reduction during FY 2015-16.

e. Details on new transfer-in budgets on the General Fund. For FY 2016-17, the campus is testing the utilization of transfer-in on the general fund during budget. Please provide the corresponding account number/object code for any new GF to GF transfers in budget. Please include the account number, account name, object code, sub-object (required) and amount. In addition, please provide a general description of the purpose.

f. Please provide Aimee Heeter (aheeter@iu.edu) with a brief summary of your RC salary-setting strategies and indicate how the strategies align with the goals of Indiana University. An important element in these strategies should be a focus on the distribution of salary increases, particularly for faculty, to show that available dollars are not being spread evenly across all salary lines. University priorities should be addressed in salary decisions, subject to resource availability and, for professional staff, to established salary structures.

All planned uses and narratives should be submitted to Aimee Heeter (aheeter@indiana.edu) by April 22, 2016.


18. Documents Requested by Campus

Please provide supporting documentation to Rozzie Gerstman for any reason codes EQY, HLR for staff and PRO, NTN for faculty and there must be written justification provided to Rozzie Gerstman for any faculty salary increase over 8%.

Deadline for submission of your budget is Monday, April 11, 2016
### Employee Benefit Calculation Percentages

<table>
<thead>
<tr>
<th>Employee Category</th>
<th>Object Code(s)</th>
<th>Group Insurance/ Benefits (5625)</th>
<th>FICA (5760)</th>
<th>Retirement (5772)</th>
<th>Total (5773)</th>
<th>Rate</th>
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<tr>
<td>Exempt</td>
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<td>13.68%</td>
<td>39.88%</td>
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<td>Non-Exempt</td>
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<td>13.68%</td>
<td>39.88%</td>
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<td>PERF &amp; Retirement Savings Eligible</td>
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<td>19.50%</td>
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<td>PERF Staff Premium</td>
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<td>PERF Staff Work Hours</td>
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<td>12.57%</td>
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<td>Student Temporary</td>
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<td>Supplemental Pay</td>
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<td>Supplemental/additional student pay</td>
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</tbody>
</table>
INDIANA UNIVERSITY
Campus
REQUEST FOR ERIP STRATEGIC ACCOUNT SPENDING

Requestor: ________________________________________________________________
RC - Department: __________________________________________________________
Request Date: ______________________________________________________________

Investment Purpose (Note alignment to specific strategic initiative(s)):
________________________________________________________________________
________________________________________________________________________

From Account: ______________________________________________________________
To Account: ________________________________________________________________

JUSTIFICATION
Aligning unit priorities with campus strategic goals will further enhance our ability to
leverage the collective assets of the campus, create efficiencies in implementation, and
foster connections among units and systems that can lead to improved outcomes for
students and faculty.

(Articulate how the investment advances the RC long-term strategic goals as noted
in the relevant strategic plan. Please include supporting documentation and benchmarks/
metrics to measure progress toward and ongoing achievement of stated goals.)

APPROVALS:

DEAN/DIRECTOR/FISCAL OFFICER: ____________________________________________
Date

AVP & Director of Budget:
(Aimee Heeter) __________________________________________________________
Date

PROVOST/CHANCELLOR:
(Lauren Robel) __________________________________________________________
Date

VP CHIEF FINANCIAL OFFICER:
(Mary Frances McCourt) __________________________________________________
Date

Please email all completed requests to Aimee Heeter (aheeter@iu.edu).