Computer Purchase on PCards

Per the Controller’s Office Computer Inventory and Internal Control Policy, computers (desktops and laptops) and printers, should be procured through the University’s campus-wide vendor contracts including direct purchases through the University Bookstore.

Per the Procurement Card Manual, allowed charges on the PCard include copier lease and maintenance payments (this does not include equipment purchases). Excluded charges are Capital Equipment. PCard Best Practices are to promote strategic buying using preferred suppliers. Departments are responsible for purchases less than $5,000 by using established contract, ensuring best price, following guidelines and ethics.

2017 Mileage Reimbursement Rate Changes

Effective January 1, 2017 The Board of Regents and The University of Iowa travel policy will change to follow the IRS guidelines for reimbursement. The mileage reimbursement rates are as follows:

1. The University’s mileage reimbursement rate of $.54/mile has decreased to $.535/mile for the following:
   - The round trip distance traveled is less than 100 miles;
   - The round trip distance is more than 100 miles and a motor pool vehicle is requested, but not available;
   - Use of a motor pool vehicle is not possible or not feasible (i.e. faculty or staff members are located in an area not served by campus motor pools)

2. The University reimbursement rate of $.27/mile has decreased to $.268/mile. This mileage rate is applicable for trips of more than 100 miles or if the traveler chooses to use a personal vehicle when a motor pool vehicle was available.

The correct rates will default into any new travel expense voucher (TEV) based upon your dates of travel and miles traveled. The applicable mileage rates for various dates of travel may also be viewed at http://www.uiowa.edu/ap-purchasing/travel.

Questions regarding this policy change may be directed to protrav@uiowa.edu.

New Performance Review Tool Updates and Training Information

CLAS HR will be offering several training sessions in January and February for Supervisors and P&S employees. In addition, we will have a couple of open computer labs for anyone who would like to stop in for one-on-one support. It is not necessary for supervisors to attend both a supervisor and a non-supervisory session, as the information in the non-supervisory session will be repetitive to those who attend the supervisor training, but they are welcome to if they find it helpful to hear the information more than once.

Please note: We are not offering training sessions for Merit employees as they will not enter any information into the new Performance Management Tool themselves. Merit employees will only complete the Word Self-Evaluation Tool, which will be uploaded into the Performance Management Tool by their supervisor, and the Merit employee will only need to electronically sign the review after the discussion occurs between the employee and supervisor. The training sessions will occur on the following dates/times:

Supervisors (2520D UCC)
   - Tuesday, January 17, 2017, 10:00 a.m. – 11:00 a.m.
   - Wednesday, January 25, 2017, 1:30 p.m. – 2:30 p.m.

P&S (Non-Supervisory) Staff (2520D UCC)
   - Thursday, January 26, 2017, 3:30 p.m. – 4:30 p.m.
   - Monday, January 30, 2017, 9:30 a.m. – 10:30 a.m.
   - Monday, February 13, 2017, 10:00 a.m. – 11:00 a.m.
   - Wednesday, February 22, 2017, 1:30 p.m. – 2:30 p.m.
Monitoring Cash Handling Training in CQ (Compliance & Qualification) System

The University’s Cash Handling Policy requires that all employees who are involved in the cash handling process complete cash handling training annually. Beginning January 5th, you may monitor cash handling training compliance through the CQ system (Compliance & Qualification). All current training that has been completed will be reflected in the system. Please see below for additional details.

- How can training compliance be met?
  - Completing the ICON Cash Handling course #W00337 (most common). Training credit will be automatically reflected when the course is complete.
  - Completing in-person training that is provided by unit leaders to multiple employees simultaneously (less common – used by areas with high number of student employees). Training credit will be given after the unit’s HR Rep updates the system by documenting individual employee’s completion.

- What types of notifications are sent to remind of upcoming compliance deadlines? The following 3 deadline notifications are sent:
  - Employee will be sent a notification 30 days prior to the deadline.
  - Employee, supervisor & HR Rep will be sent a notification 5 days prior to the deadline.
  - Employee, supervisor & HR Rep will be sent a notification when the deadline has passed.

- Who can view the status of training compliance in the CQ System?
  - Individual employees, direct supervisors, HR Reps, compliance administrators and compliance managers can view status reports.

Please contact Accounting & Financial Reporting with questions: https://aft.fo.uiowa.edu/.

ITS Telecomm & Network Services

There have been recent changes made to the Operations Manual Personal long distance and cellular phone policy that will impact how many of you monitor and track personal long distance calls made on University equipment. Effective immediately, the following policy and practice changes will be implemented:

Policy changes:

- Personal phone calls made on University equipment should be kept to a minimum. Long-distance personal phone calls are the responsibility of the employee and should not be made on University equipment.
- Reports showing details of monthly long-distance calls are maintained by ITS-Telecommunications and Network Services for up to five years and are available to departmental billing coordinators as needed. Billing coordinators, in coordination with the account reviewers and individual employees, are responsible for reasonably ensuring compliance with University policy.

Practice changes:

- There is no longer a need or requirement for employees to initial each long distance statement to approve charges as legitimate business expenses.
- Individual departments will no longer need to retain long-distance call reports for official record retention purposes.
Revised Research Subject Compensation Payment Policy

Effective January 1, 2017, research subjects must be compensated with a University check and complete a Substitute W-9 (https://uiowa.edu/ap-purchasing/sites/uiowa.edu.ap-purchasing/files/RsrchParticipant_SubW9_111416.pdf)/Substitute W-8BEN (https://uiowa.edu/ap-purchasing/sites/uiowa.edu.ap-purchasing/files/W-8BEN_111416.pdf) if any one of the following apply:

- The payment to the subject is greater than $100;
- Cumulative payments to the subject will exceed $600 in a calendar year; or
- Subject is a non-resident alien

All other research subject payments continue to require collection of subject information (name, address, type of payment, and payment date). The only exceptions are when IRB has approved a waiver of documentation of consent in order to protect the identity of the research subject.

If you or anyone in your department is responsible for disbursing payments to research subjects, you should review the entire revised policy here: https://gao.fo.uiowa.edu/research-subject-compensation-policy-procedures.

PARs Reporting

We have revised the PARs: CLAS Helpful Guide for Effort Reporting on the CLAS Finance Group website. The modification includes a new requirement to retain documentation of a supervisor’s approval if a PAR is completed on the behalf of a P&S, GRA, TA, Post Doc or Merit staff by an employee who does not have full knowledge of that individual’s effort. The documentation can be an email confirmation from the supervisor or the supervisor’s signature/date on a spreadsheet or other document that outlines the individual’s actual effort on projects. You can view the guidelines in their entirety at: https://clas.uiowa.edu/finance/pars-clas-helpful-guide-effort-reporting.

Food & Beverage Policies

During your next annual review of your departmental Food and Beverage policies, please ensure they contain wording defining the funds that will be used to cover food expenses and also a statement on the department’s stance on alcohol purchases. CLAS strongly discourages the use of UI funds to be used for alcohol purchases for faculty/staff. Students may participate in events that are held through a licensed caterer who will limit the number of alcoholic beverages per person and will be responsible for checking I.D.’s. All events of this nature must receive prior approval from CLAS. Please use the below examples to customize to your department’s policy. Send your revised policies to shari-sorensen@uiowa.edu for review and approval.

The Dean’s Office currently does not have a Food and Beverage policy on file for many departments. Please contact Shari if you would like a policy to use as a template/example when creating one. If the department does not allow any UI funds to be used for non-travel food and beverage purchases, please send an email to Shari to be filed in place of a policy.

Examples:

- No food or alcohol shall be paid with fiscal (fund 050) funds unless it is considered part of a business-related trip and is therefore coded as travel. All other business-related meals or refreshments will be paid with 240 or 520 funds. Alcohol shall only be paid using Foundation (fund 520) funds and never charged to a PCard. Only alcoholic beverages are paid for guest speakers, a reasonable amount (i.e. 1-2 glasses of wine). No alcoholic beverages are purchased with University of Iowa or UI Foundation funds for students, faculty, or staff.

- The department will not fund alcohol of any kind, even for visitors/guests. All food purchases will come from funds other than 050, except for events specifically funded by the Provost.
No food or alcohol shall be paid with fiscal (fund 050) funds unless it is considered part of a business-related trip and is therefore coded as travel. All other business-related meals or refreshments will be paid with 240 or 520 funds. Alcohol shall only be paid using Foundation (fund 520) funds and never charged to a PCard. A reasonable amount (i.e. 1 glass of wine or beer per person) of alcoholic beverages will be paid. No alcoholic beverages will be purchased for students.

**Family Medical Leave Act (FMLA) – Triggers**

Below are the requirements to notify Jenny Britton, CLAS Human Resources Leave Management Specialist, regarding Family Medical Leave Act (FMLA) qualifying events for staff to ensure compliance with our obligations under federal law. It is also important to contact Jenny even when a staff member is not FMLA eligible, as the employer is required to send the employee formal notice of non-eligibility.

Please contact Jenny Britton at jenny-britton@uiowa.edu or 319-384-3253 as soon as you become aware of any of the following scenarios. (Please note: Faculty FMLA and medical leave questions should continue to be directed to Alaina Hanson.)

- Employee or eligible family members (spouse, parent, child) serious health condition
  - Condition requiring an overnight stay in a hospital or other medical care facility;
  - Condition that incapacitates the employee or employee’s eligible family member (i.e., unable to work or attend school) for more than three (3) consecutive days;
  - Chronic conditions that cause occasional periods when the employee or eligible family member are incapacitated and require treatment by a health care provider at least twice a year.
- Pregnancy (including prenatal medical appointments, incapacity due to morning sickness, and medically required bed rest)
- Employee’s Expanding Family
  - Leave for the birth of a child and/or to bond with the newborn child
  - Placement of a child for adoption or foster care and to bond with that child
- Military Family Leave
  - Leave due to a family member’s military service, injury, or illness.

In addition, there are some potential FMLA/Americans with Disabilities Act (ADA) triggers to listen for/watch for as a supervisor which should prompt a conversation with your Human Resources Representative regarding next steps. Please see the email sent by Melissa Fiacco dated January 3, 2017 (Family Medical Leave Act (FMLA)) for this information.

If you have any questions regarding this information, please contact Melissa Fiacco, melissa-fiacco@uiowa.edu or 319-335-6479.

**Guidance Regarding Service Animals in University Buildings under the Americans with Disabilities Act (ADA)**

Service animals that are individually trained to do work or perform tasks for an individual with a disability are allowed in University buildings (see 35.5.d. Animals in Buildings, [https://opsmanual.uiowa.edu/administrative-financial-and-facilities-policies/conditions-use-university-facilities](https://opsmanual.uiowa.edu/administrative-financial-and-facilities-policies/conditions-use-university-facilities)).

It is important to ensure our faculty and staff understand what inquiries are allowed regarding a service animal. “In situations where it is not obvious that the dog is a service animal, faculty and staff may ask only two specific questions:

1. Is the dog a service animal required because of a disability? And
2. What work or task has the dog been trained to perform?

Faculty and staff are not allowed to request any documentation for the dog, require that the dog demonstrate its task, or inquire about the nature of the person’s disability.” ([https://www.ada.gov](https://www.ada.gov))

Please direct questions related to service animals under the ADA to The Office of Equal Opportunity and Diversity at 319-335-0705.

Please share with DEO’s and appropriate staff within your departments

http://clas.uiowa.edu/finance  http://clas.uiowa.edu/human-resources
Important Tax Information – 2016 W-2
The 2016 W-2 forms are not currently on Employee Self Service, but if you want them as soon as they are available, please sign up to receive your W-2 electronically.

This message is to encourage delivery of your W-2 through the University of Iowa Employee Self Service website. You may request electronic delivery by checking the appropriate box within the "Stop Paper Mailings" option located in the Personal tab of Employee Self Service.

The electronic version will serve as your official document and is available on a secure site. By selecting the electronic version, your social security number will not be sent through US Mail and your forms will be available at least one week before the paper forms will be mailed. Once you have received notice that the electronic version is available, Two-Step Login with Duo Security will be used to access your W-2. Further information regarding Two-Step Login can be found on the ITS website at https://its.uiowa.edu/duo.

You may consent or revoke your election to receive your W-2 electronically until January 9, 2017. If you consented to receive your form electronically for the prior year, your consent will remain unless you change it. If you do not consent to receive your W-2 electronically, the University of Iowa will send your form through US Mail.

For additional information and software requirements, please see the View Year-End Tax Information section under the Personal Tab of the Self Service site.

Faculty Terminations
Please process any Spring Terminations as soon as possible.

Reminders
Jan. 25 – Monthly payroll cutoff at 5 p.m.