

# UFS ADVISOR

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## TREASURER'S MESSAGE



[Penny D Cox](#)

We are approaching the conclusion of the Fall 2023 semester and the celebration of graduation as several thousand students walk across the stage to receive their diplomas. This will be a hallmark day for the students and their families. I ask that each of you reading this message take a moment during this holiday season to reflect on the role you played and difference you made!

### 2022-23 FINANCIAL AUDIT

Thank you for your support and dedication for good year-end close and another successful audit. I am pleased to report that we received a "clean" unmodified audit opinion for 2022-23 fiscal year from FORVIS, our external auditor.

FORVIS provided the Board of Trustees on December 4<sup>th</sup> with an update on internal controls and compliance as required by the State and federal government, and various agreed-upon procedures reports. I encourage you to review the 2022-23 Annual Financial statements at <https://www.uky.edu/ufs/financial-statements>.

### PROJECT GATEWAY

Project Gateway (Grants Administration Transformation as the WAY forward) was initiated to continue our success in growing sponsored research. A soft launch of phase I will occur in December. Learn more here: <https://www.research.uky.edu/resources/project-gateway>.

### FEEDBACK

We want to hear about what's gone well, what processes/procedures you're struggling with, and how we can better support your units. Integration and adaptability are essential for UFS to continually improve. Therefore, if you have suggestions or feedback, we ask that you submit those via our website at this link <https://www.uky.edu/ufs/ufs-feedback-form>.

Thank you your ongoing partnership and collaboration.

Penny D. Cox, Treasurer

## ARTICLES

## Sign up to Receive Your W-2 Forms Online

Receive your University of Kentucky 2023 W-2 online by signing up now through myUK Employee Self Service (ESS) using your link blue username and password.

The deadline for electing to receive your W-2 online is **January 15, 2024**. If you previously enrolled, you do not need to take action. Your electronic for W-2 online will remain in effect for future years unless you choose to change it during an election period or separate employment from the University.

Instructions can be found on the UK Human Resources [W-2 Online Delivery](#) webpage.

### Benefits of using online W-2s:

- Early access than traditional mail.
- Remote accessibility for current and former employees.
- Convenience: Access to print when convenient for you.
- Protection against lost or misdirected mail.

Employees who do not enroll in the program will have a paper W-2 form mailed, no later than January 31, 2024, to their permanent address on file in the HR/Payroll system. Employees should review and if necessary update their permanent address before the January 15, 2024 deadline by following the steps listed [here](#).

## Project Payroll Confirmation Software Upgrade

The online software tool used to complete the preliminary review and confirmation of payroll expenses on sponsored projects was upgraded on October 1, 2023. Formerly known as “ecrt,” the new name for the software is “*Employee Compensation Compliance*” (ECC). The software upgrade includes several improvements related to enhanced reporting tools and user interface intended to streamline the overall user experience in the system, while maintaining the same core functionality.

The tool is still accessed via myUK – Enterprise Services-ECC Payroll Confirmation.

The roles and responsibilities for the pre-review and confirmation processes remain unchanged. In preparation for this software upgrade, various online training sessions and open lab hours were available to campus end users. These sessions provided a walk-through of the key changes in the layout of screens, as well as the opportunity to ask any questions. The sessions were scheduled throughout the completion period for the statements related to expenses for the first quarter of Fiscal Year 2024 (July 1, 2023 – September 30, 2023).

We would like to thank our campus partners, both faculty and staff, for their active participation in these informational sessions and excellent discussion! If you could not attend any of these sessions, please refer to our website for more information. <https://www.uky.edu/ufs/project-payroll-confirmation-sponsor-salary-cap>

## Two-Way Match Related to Ariba Network E-catalog Orders

University Financial Services (UFS) and Procurement Services have been conducting a review over the course of several months of Shopping Cart/Purchase Order transactions in an effort to increase efficiencies, reduce outstanding payables, and improve payment processes. A key challenge to blockages within the payables portion of the transaction stream relates to the requirement for Goods Confirmations to complete the 3-way match. A significant portion of purchase orders continue past their scheduled payment dates due to missing requirements for creation of Goods Confirmations.

To reduce payment release issues for a majority of SRM Ariba Network e-catalog orders placed, **effective November 16**, the following changes were applied to purchase orders for SRM Ariba Network e-catalog orders with a **total PO value of \$5,000 or less**:

1. The requirement for creation of a Goods Confirmation was removed, thereby converting them to a two-way match requirement (PO and invoice) to release.
2. To accommodate required checks and balances, departmental approval is now required on all e-catalog orders at the Shopping Cart level, including Office Depot (ODP Business Solutions).

If assistance is needed with goods ordered on e-catalog orders, within seven days of the invoice posting date, the ordering department should:

1. Contact the supplier and provide them with your account number and Purchase Order number.
  - a. If goods were not received or were shorted, request proof of delivery.
  - b. If goods were damaged, ask for replacement of the damaged items.
2. If the issue is not resolved to the unit's satisfaction, contact Procurement Services at [SRMhelp@uky.edu](mailto:SRMhelp@uky.edu) for support.

**Please note the above changes applied only to SRM Ariba Network E-catalog purchase orders with a total value of \$5,000 or less. No requirements for 3-way match changed for e-catalog orders greater than \$5,000 or SRM Free Text orders.**

This change was implemented as a **pilot project**. A review is planned after 90 days by UFS and Procurement Services to assess effects from the changes.

Questions can be directed to [srmhelp@uky.edu](mailto:srmhelp@uky.edu).

## Nonresident Alien Tax Compliance Software

All foreign nationals receiving income (wages from employment, scholarships/fellowships/grants, royalties, honoraria payments, etc.) from the University are required to have a tax analysis performed.

The tax analysis determines the individual's tax status, and eligibility for federal tax exemptions, on part or all of their income, based on a tax treaty between their country of tax residence and the U.S. The tax analysis also ensures taxes are withheld at the appropriate tax rate as required by IRS guidelines.

We are pleased to announce the implementation of our new nonresident alien (NRA) tax compliance software, **Sprintax Calculus** (Sprintax). Sprintax, a web-based software, enhances the University's overall tax compliance while offering our foreign national students, employees, and visitors a convenient, streamlined method of completing their tax analysis.

### Key features of Sprintax Calculus:

- Organizes and securely stores documents online allowing for a more thorough review while reducing paper usage.
- Maintains immigration/visa history, calculates substantial presence test, and determines tax residency status.
- Validates treaty benefit eligibility based on the type(s) of income the individual receives from UK.
- Prepares IRS-required tax withholding forms and treaty benefit forms, if applicable.
- Allows individuals to review and electronically sign all necessary forms and documents.
- Provides a tax overview and individual summary for each user.
- Generates applicable 1042-S forms that can be downloaded, printed, or imported directly into **Sprintax Returns** (tax preparation software provided by the University's International Student and Scholar Services).

Foreign national students, employees, and visitors with any tax-related questions or needing to complete an initial tax analysis can email [internationaltax@uky.edu](mailto:internationaltax@uky.edu). We look forward to hearing from you and sharing this exciting new software with you!

## Third-Party Hotel Vendors

Travel Services recommends that business travelers avoid booking lodging through third-party vendors if possible. Rather than using a third-party vendor, we recommend that hotel reservations for University business be booked directly with the hotel via their website, by phone, or through a UK Travel vendor (Concur, AAA or Avant).

Some examples of third-party vendors include Priceline, Expedia, Kayak, Cheapflights, Reservationdesk, and Hotelvalues. These vendors insert themselves into Google searches by paying for sponsored listings and creating websites that look like hotel websites.

Risks associated with booking through third-party vendors include increased room rates and fees, as well as lack of itemized hotel folio receipts for reporting travel expenses in Concur. In addition, these vendors may not include packaging of hotel, airfare and/or rental car costs.

For questions, please contact Travel Services at [travelservices@uky.edu](mailto:travelservices@uky.edu).

## Hotel Discount - Nationwide Hotel Chain

The University of Kentucky has partnered with IHG Hotels and Resorts to provide university travelers with a nationwide 7% discount at any IHG Hotels and Resorts property. IHG Hotels and Resorts has 19 hotels brands including Holiday Inn, Crowne Plaza, Intercontinental and Staybridge Suites and over 6,000 global destinations.

Travelers can take advantage of this discount two ways, booking through a UK Travel Services vendor or booking directly with the IHG hotel via their website, app or by phone and providing the university's corporate ID. The corporate ID can be found on the [Travel Services website](#) (must login with linkblue credentials). This discount is available to all **UK employees for both business and personal travel**.

If you have any questions about this discount, please contact Travel Services at [travelservices@uky.edu](mailto:travelservices@uky.edu).

### Concur/Travel Additional Training Opportunities

Training Class	Date	Time	Location
Concur Online Booking Tool	12/14/2023	8:30am-10:00am	Virtual
Advanced Concur Online Booking Tool	12/14/2023	10:30am- 12:00pm	Virtual
<b>In addition to the scheduled training classes we also have the below on-demand trainings.</b>			
Introduction to Concur Travel & Expense Management	On-demand	On-demand	Virtual
Concur: Create a Travel Expense Report from a Pre-Approved Travel Request	On-demand	On-demand	Virtual
Concur: Creating a Travel Expense Report without a Travel Request	On-demand	On-demand	Virtual
Concur: Creating a Travel Request	On-demand	On-demand	Virtual
Concur: Expense Reporting for Procard Transactions	On-demand	On-demand	Virtual
Concur: Review and Complete User Profile Settings	On-demand	On-demand	Virtual
Cash Handling Basics	On-demand	On-demand	Virtual
Procurement Card	On-demand	On-demand	Virtual

For more information or to register for these courses visit your **myUK Employee Self Service Training** page.