Aloha JABSOM Administrators!

Happy New Fiscal Year 2017!

During this 2017 hurricane season, employees are encouraged to review and update their emergency contact information as needed. UH employees should contact their respective JABSOM Human Resources Specialist for assistance. RCUH employees should contact the RCUH Human Resources Office for assistance. In the event of an emergency situation, please stay tuned to news media announcements and UH/JABSOM email bulletins/text message alerts. Stay safe.

For all other human resources or fiscal matters, as always, please do not hesitate to contact your Human Resources Specialist or Fiscal Administrator if you have any questions or concerns. Contact information is available on the JABSOM Office of Human Resources and the JABSOM Office of Fiscal & Administrative Affairs websites.

Mahalo!

Coco Seymour
JABSOM Chief Administrative Officer (CAO)
**ESF-1**

**Glitch with Multiple Browser Tabs Open**

As noted by several users, there was a glitch when opening multiple browser tabs of the eSF-1 system. The JABSOM IT team issued a patch to fix this problem. We apologize for the inconveniences. As always, please contact your Human Resources Specialist or Fiscal Administrator if you note any other problems. Mahalo.

**GENERAL CONFIDENTIALITY NOTICE**

**ACER System**

The University of Hawaii ITS team is implementing its online Acknowledgements and Certifications (ACER) System, whereby users can complete an online UH Form 92 General Confidentiality Notice. The General Confidentiality Notice is a prerequisite for administrators and principal investigators requiring human resources information or fiscal system access. New users are encouraged to complete the online General Confidentiality Notice via the ACER System. Existing users who already have a hardcopy General Confidentiality Notice on file do not need to complete the online ACER certification, but may do so if desired.

**APT EVALUATION**

**APT Performance Expectations and Evaluation**

If not done so already, APT Supervisors can now enter performance expectations for the next rating period (11/01/15 – 10/31/16) by accessing the on-line Performance Evaluation System. To facilitate the process of creating performance expectations for the new rating period, the system “carries over” expectations that were certified in the 2014 – 2015 rating period. Supervisors may follow one (1) of four (4) options:

1. Utilize the same expectations,
2. Use the previous expectations as guides to create new expectations and/or edit previous expectations,
3. Delete the previous expectations and create new expectations, or
4. Request subordinate(s) to initiate the creation of expectations.

Supervisor and subordinate should strive for agreement on expectations that are job related, measurable and verifiable, realistically attainable, and achievement within the subordinate’s control. At the end of October 2016, supervisors will need to meet with employees for their performance evaluation. Evaluations shall be documented on the Performance Evaluation System.

More information is available [here](#).

**EMERGENCY CONTACT**

**Emergency Contact Information**

As we are in the midst of hurricane season, this is a friendly reminder to ensure your emergency contact information is current. For UH employees, please contact your respective Human Resources Specialist to review and update existing information as needed. For RCUH employees, please contact the RCUH Human Resources Office. Mahalo.
Fiscal Updates & Reminders

**BUDGET**

**General & Tuition Funds**
Per the JABSOM CFO’s announcement at the Administrative Operations Group (AOG) meeting on Tuesday, July 12, 2016, departments’ Fiscal Year 2017 General and Tuition Budgets will remain the same. Changes may be made depending on JABSOM’s forthcoming budget allocation from Manoa. Questions may be directed to JABSOM Chief Financial Officer, Nancy Foster, or JABSOM Budget Officer, Michael Yoshinaga.

**RTRF Expenditure Budgets**
For budget reporting purposes, Manoa requests units, including JABSOM, be more diligent with budgeting planned expenses in the fiscal year. For non-expired RTRF (xxxxxxx) accounts, please email Keenan Lee a simple budget with breakdown by major categories (e.g. salaries, fringe, supplies, travel, etc.) for those funds you plan to spend through June 30, 2017. If your account extends beyond June 30, 2017, please only provide a budget for the portion of funds you plan to spend by June 30, 2017. Once the budget is loaded into KFS, spending may commence on the account.

**CONTRACTS & GRANTS**

**New Subaward Process**
Effective July 1, 2016, the Office of Research Services (ORS) revised the subaward process. In an effort to minimize the turnaround time required to initiate a subaward, reduce administrative burden to principal investigators (PIs), and improve internal controls necessary to comply with governmental regulations and sponsor requirements, the preparation of subawards will now be handled by ORS (instead of PIs and fiscal administrators). Key process changes at the proposal, award, and post-award stages along with more detailed information are available here and here.

**Cost Sharing Certifications**
Annual Cost Sharing Certifications were generated in early August 2016 and are available on the Office of Research Services (ORS) Cost Sharing Certification website. The Principal Investigator (PI) must certify the reasonableness of cost shared to their projects. Any noted differences must be annotated in the “Submit Annotations” section of the report. For more information on how to annotate changes along with other information, please refer to the instructions here or contact your respective Fiscal Administrator for assistance. Cost Sharing Certifications must be approved by September 30, 2016.

**FTE Certifications**
Annual FTE Certifications were generated in early August 2016 and are available in Principal Investigators’ (PIs) KFS action lists. The PI must certify the reasonableness of compensation that has been charged. If not done so already, PIs should log into KFS with their UH username and password, click on Action List, and review and approve all Effort Certification eDocs. Thereafter, Effort Certification eDocs will route to the appropriate Fiscal Administrator for final review and approval. All Effort Certification eDocs must be fully approved by September 30, 2016. Questions may be directed to your respective Fiscal Administrator.

**RCUH**

**$3,500 Bidding Threshold**
This is a friendly reminder that the bidding threshold has been raised from $2,500 to $3,500 for purchases executed through the RCUH system only. Purchases below $3,500 do not require competitive solicitation, although obtaining a quote from the desired vendor is highly recommended. The bidding threshold for purchases executed through the UH KFS system remains at $2,500. Sorry.

**Updated Forms**
RCUH has updated their Agreement for Services, Sole Source, and Cost Price Reasonableness forms. Please be sure to use the latest versions of the forms. These versions are available as an electronic attachment on the online RCUH purchase requisition. If an offline copy is needed, these templates may be found in the Procurement Document Library. RCUH recommends not saving templates as they may be updated occasionally.

**Service Order IDC Increased to 3.2%**
Effective January 1, 2017, RCUH will be raising the indirect cost rate from 1.5% to 3.2% for all service-ordered funds, i.e. RTRF (xxxxxxx) or Tuition (xxxxxxx), transferred to an RCUH Service Order Account, i.e. 0007xxx, 0008xxx, 0009xxx. Please factor this additional increase...
when preparing your service order forms. More information on this increase is available [here](#).

**KFS**

**Cash Advances**

For those departments/programs who provide research participant incentives utilizing RTRF (3xxxxxx) or Tuition (2xxxxxx) funds, the UH Disbursing Office prefers these research participant incentives be administered through a cash advance. A designated UH employee serves as the custodian of the cash advance funds, which can then be distributed to participants as cash or gift cards as desired. The custodian shall maintain a distribution log. Participants should be U.S. citizens as substantiated by a submitted WH-1. Understanding many studies require confidentiality, departments/programs may maintain participants’ information on file and use pseudo numbers for the distribution log. In the event compensation exceeds $600 within a calendar year, UH Disbursing asks that the participant’s WH-1 be provided for IRS tax reporting purposes. Please contact your [Fiscal Administrator](#) ahead of time for procedures and assistance with setting up the cash advance.

**DV Payments to RCUH**

Please use Payment Reason Code H – RCUH and object code 7285 for all KFS Disbursement Voucher (DV) payments made to RCUH regardless of funding source.

**TRAVEL**

**eTravel Enhancements**

During the last two annual audits, the University’s external auditor, Accuity LLP, noted delinquencies in travel completion submissions. In an effort to eliminate similar findings in future audits, effective August 1, 2016, the [eTravel website](#) was enhanced to include the following corrective measures:

1. **Restriction on Future Travel Request:** If the traveler has a completion(s) outstanding for more than 30 calendar days from the return date, future travel requests will not be allowed. To avoid this restriction, completions must be submitted and routing for approval before the 30 calendar days mark.

2. **Justification for Late Travel Completion Submission:** A justification is required for completions that are submitted 21 calendar days after the return date.

3. **Delinquent Traveler Report:** The report, which is only available to those travelers and their preparers who are affected, shows those travelers who have outstanding completions and, therefore, are unable to submit future travel requests.

For more information, please refer to this [email](#) from the Financial Management Office and this [powerpoint presentation](#) highlighting the enhancements.

**PCARD**

**PCDO Newsletter**

The Office of Procurement and Real Property Management (OPRPM) is now issuing monthly PCDO newsletters. Please feel free to read current and past issues [here](#) (you may need to login with your UH Username and Password to access the site). Questions may be directed to [Adell Vierra](#).

**PCard Closures**

Please notify [Adell Vierra](#) as soon as word is received that a PCardholder will be terminating or accepting a position in another department, whether in JABSOM or another unit. Timely closure of PCards will minimize questions from OPRPM and ensure overall protection against fraudulent activity. Mahalo.

**INVENTORY**

**Reminder: Annual Inventory Deadline**

This is a friendly reminder that the Fiscal Year 2016 Physical Inventory Reports are due to the Fiscal Office by September 30, 2016. Please submit reports as they are completed in order to minimize follow-up requests from our office and the UH Property and Fund Management Office (PFMO). Please contact [Marga Stubblefield](#) with any questions or concerns.