In This Issue

Roll Back the Soundbites on FIN 9.2 - Where Did We Start Post-Go-Live and Where Are We Now? 4

2015 Financial Report Available from the OUC 5

Boulder Sales Tax Rates Remain the Same as of January 1, 2016 5

Pre-Approval Review Required 5

New Process for Officer Disclosure of Interest Beginning Fall 2016 -- and -- Disclosure of External Professional Activities (DEPA) Due March 31, 2016 6

CU Innovation & Efficiency Awards Program - Get Recognized, Win Cash Prizes 6

CPE for CPAs 7

PeopleSoft Finance Training 7

CU@Lunch: Cost Principles 7

Returning Mid-March: Knights of the Research Round Table Discussions 7

Interview: Liz Kollipara with SPA's Invoicing & Cash Management Team 9
### INSTRUCTIONS

Click here to access full descriptions and to add an event to your personal calendar.

---

#### FEBRUARY 2016

<table>
<thead>
<tr>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

8 9 10 11 12

- Sales tax documentation for the previous month’s sales tax is due from departments. Send to: Maggie.Young@Colorado.EDU

15 16 17 18 19

- December 2015, January and February 2016 close dates are TBD. As soon as the new dates are finalized, CCO will distribute an updated calendar.

22 23 24 25 26

#### FEBRUARY - MARCH 2016

<table>
<thead>
<tr>
<th>29</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
</tr>
</thead>
</table>
Roll Back the SoundBites on FIN 9.2
Where Did We Start Post-Go-Live and Where Are We Now?

The Elevate FIN 9.2 system went live on December 10, 2015. At that time, items remained in the development and migration stage: access, workflow, JEs, and more. Since that time, the Elevate Team, CCO, the Office of University Controller (OUC), and UIS have worked diligently, side-by-side with the other CU campuses to migrate data fields, validate data, and confirm it is accurate, test JEs and workflow. We are doing our very best to ensure that the system is working as accurately as possible for our constituents on all four CU campuses and at the CU System Office.

Along the way, some processes changed. For example, several customizations were removed from the system to better match the functionality delivered by our vendor in this newer release. Many processes were affected, for example, cash transfers which now route through the controller’s offices for secondary approval.

Managing a project of this magnitude necessitates time, teamwork, and diligence; and, every step of the way, we have reached out to you for input and ideas. Together, we have come a long way, and we realize there is still work to be done. Because we are meticulously reviewing every sponsored project award under the new grants module, shifting cost share from a project to project based model, double checking every journal entry (not just for secondary approval), reviewing all encumbrances, PETS and purchase orders, we have cautiously delayed the campus close dates for December 2015, January 2016 and February 2016. As of February 2, these dates remain TBD.

As you are aware, the CU System Office is leading the Elevate FIN 9.2 upgrade project on behalf of all campuses. In an effort to share information, remain transparent and assist you in your daily jobs as you wait for the full integration of the system, they have developed several resources. You may view FAQs and answers to common questions on the Answer Board at [http://www.cu.edu/controller/elevate-fin-stage](http://www.cu.edu/controller/elevate-fin-stage). On the Boulder campus, we created an Elevate Status webpage which is intended to pull together FIN resources specific to our campus. Our Deputy Controller and Director of Sponsored Projects Accounting, Leila McCamery, is distributing updates via email as updates are available during the week. These efforts are intended to be transparent and simultaneously keep you informed - giving you the latest status on the project as quickly as possible.

What’s next?
We will continue to validate data, monitor the conversion, approve secondary journal entries as quickly as possible, and keep you updated regarding the status of the project.

As ePERs, PETS and POs on sponsored projects are updated and once we ensure they are working properly, we will move forward with those items as well.

In the meantime, we are processing new SpeedTypes for both programs and projects, sponsored project invoices are being created manually so that remain compliant with our contractual obligations. The System Office is updating reporting tools and processes so that our reports are accurate and reflect appropriate balances.

In short, this is a team effort and we are relying on your assistance, patience and input to keep this project moving forward. Many of you went through a similar upgrade in the late 1990s. With your assistance now, we can make this upgrade move forward faster and more accurately.

If you have questions, need assistance, or simply want a status update, please reach out to the FinProHelp Desk at [FinProHelp@cu.edu](mailto:FinProHelp@cu.edu). They are available to assist with technical issues. If you need project, program or Fund assistance, contact your [Area Accountants](mailto:Area Accountants) or [Grant Accountant](mailto:Grant Accountant). CCO is always available and willing to answer your questions.

2015 Financial Report Available from the OUC

The University of Colorado and the Office of University Controller (OUC) are pleased to present the 2015 Annual Financial Report.

Please visit: [https://document.colorado.edu/ocpubs/annualreport/2015/president.html](https://document.colorado.edu/ocpubs/annualreport/2015/president.html) to review the full 2015 Annual Report, a message from President Benson, which includes details regarding how the University continued to set new records in growth in Fiscal Year 2015; the Independent Auditor’s Report; Management’s Discussion and Analysis; Financial Statements; and Required Supplementary Information. A PDF version of the Annual Report is also available for download.

Boulder Sales Tax Rates Remain the Same as of January 1, 2016

Last year, Boulder County’s sales tax rate increased from 0.80% to 0.985%.

The rates did not change January 1, 2016. A complete list of all sales taxes in Boulder County are available online.

Below is a breakdown of current Sales Tax Rates which remain in effect:

- Boulder County Sales and Use: 0.985%
- State of Colorado: 2.9%
- RTD: 1.0%
- Scientific Cultural District: 0.1%
- Total: 4.985%

The City of Boulder’s sales tax rates also remained the same. Below is a breakdown for the City of Boulder combined tax rate:

<table>
<thead>
<tr>
<th>Tax Type</th>
<th>City</th>
<th>State</th>
<th>County</th>
<th>RTD</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales</td>
<td>4.01%</td>
<td>2.90%</td>
<td>0.985%</td>
<td>1.10%</td>
<td>8.095%</td>
</tr>
<tr>
<td>Food</td>
<td>0.00%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Service</td>
<td>4.01%</td>
<td>2.90%</td>
<td>0.985%</td>
<td>1.10%</td>
<td>9.995%</td>
</tr>
</tbody>
</table>

Questions? Contact Maggie Young at 303.492.6375

Pre-Approval Review Required to Obtain the Assistant Vice Chancellor and Controller’s Approval

If your event will require approval from the Assistant Vice Chancellor and Controller for the CU-Boulder Campus, Laura Fagan, the request must also be reviewed for accuracy and completeness prior to her final review and signature.

In order to expedite processing, please submit your requests as follows:

- **Official Function Forms**
  Lisa Muzzalupo @ muzzalumo@colorado.edu

- **Donations and University-wide Memberships**
  Cityofcolorado.edu

Contracts and Expense Reports automatically route through Concurs, and After-the-Fact purchases alert the AVC and Controller through CU Marketplace.
New Process for Officer Disclosure of Interest - Beginning Fall 2016 and Disclosure of External Professional Activities (DEPA) Due March 31, 2016

Officer Disclosure of Interest

In previous years, the Officer Disclosure of Interest statements for Officers the CU-Boulder Campus were submitted via the Disclosure of External Professional Activities (DEPA) process.

Beginning this year, our campus will utilize the CU System form and the disclosures will be due in the fall. More information will be sent as we approach the timeframe for submission. Email notifications will be sent directly from the CU System Office.

If you have questions regarding the Officer Disclosure process, please contact Mirinda K. Scott at 303.492-9567.

DEPA

All faculty, except adjunct faculty, and any employee or student involved in research activities are considered critical to the research process and must disclose any significant financial interest and external professional activity that conflicts, or potentially conflicts, with university decision-making or duties. These individuals are required to complete an annual DEPA and this year’s deadline is March 31, 2016.

To learn more about what CU considers a conflict of interest or commitment for a University employee, student or affiliated person, please visit the Office of the Vice Chancellor for Research’s website, specifically the Conflicts of Interest and Commitment page at: http://www.colorado.edu/vcr/coi. To learn more about the DEPA, why it is required and who needs to submit or to get started, please visit: http://www.colorado.edu/vcr/coi/getting-started.

Please note that if you are a PI and an Officer, you will be required to complete both forms.

If you require assistance with the DEPA, please contact Pam Ross at 303.492.3024.

CU Innovation & Efficiency Awards Program

Get Recognized, Win Cash Prizes

CU Innovation & Efficiency (CU&IE) Awards - Formerly CUSP

If you or your team have improved a CU business process, the Office of University Controller wants you to submit your success story to the CU Innovation & Efficiency Awards Program. You could win a $1,500 cash award!

The CU&IE Awards Program -- previously known as the CU Shared Practices Program (CUSP) -- is a recognition program designed to highlight the creative processes of CU employees.

Through the CU&IE Awards, you can share what your team has done to improve business processes: whether that is by creating efficiencies, saving time or saving CU money.

The program offers you an opportunity to get recognition for accomplishments within your own department -- and the chance inspire other employees to take a new look at how their departments work.

Get Started:
- Read about the program
- Learn more about the vetting and voting processes
- View other employees’ prior submissions
- Complete the Awards Form and submit your success story

Questions? Contact the CU&IE Awards Program Coordinator Frances Chapman

CPE for CPAS

The CU Continuing Professional Education (CPE) program for Certified Public Accountants (CPAs) is designed to help CPAs stay current with CPA credits.

This is also a great resource for those of us who deal with financial administration on behalf of CU, but who are not CPAs. In these courses, attendees will learn best practices and financial stewardship on behalf of the university.

Thursday, February 18

CU System Office

1800 Grant Street

Cognos: Financial Statement Reading, Reconciliation, and Forecasting
- 8:30 - 11:20 AM

Cognos: Grants and Contracts
- 12:00 - 2:20 PM

Returning Mid-March: SPA Knights of the Research Round Table Discussions

Knights of the Research Round Table Discussions are intended to open the lines of communication between departments, OCG and SPA. In these discussions, we typically meet with one department. We are, of course, open to having more than one department meet with us at the same time if that works better for the attendees. Please arrange the meeting room and set aside a two-hour block of time for the forum.

While we could use this time to discuss the lifecycle of an award, from proposal submission to closeout; we prefer to receive an outline of topics you want to discuss. Knowing a few items off your key list in advance will allow us to bring individuals to the meeting who have the expertise to discuss the topics you care most about.

Our goals are to maintain open communication, make processes smoother and more effective, and support appropriate compliance with Uniform Guidance and other regulations.

To schedule a meeting, contact: Katherine.Loudermilk@Colorado.EDU or 303.492.1679

PeopleSoft Finance Training

PeopleSoft Finance Training Classes cover basic information about fund accounting and budget theory. COO shows you how to access and use the system. Training includes navigation, Chartfields, journal entries (JE’s) and reporting.

Date and Time: March 8 - 8:00 AM - 4:00 PM

Location: CU-Boulder East Campus - Marine Street Science Center (MSSC), 3125 Marine Street, Room W179

For further information, or to register please email Controller.Training@Colorado.EDU

CU@Lunch: Cost Principles

CU@Lunch is a discussion forum for departmental research administrators, OCG, and SPA staff to provide input, ask questions and respond to various initiatives within research administration.

The February CU@Lunch discussion forum will focus on procedures around changes to cost principles as required by Uniform Guidance.

Facilitator: Tolise Miles

Date & Time: February 4, 2016, 12-1 PM

Location: UMC Room 247

Content Presenters:
- Karen Stiner, CCO
- Sharon DeCarlo, CCO
- Kathryn Snider, OCG
- Joanna Fu, OCG
- Pat Dodson, OCG

Human Asset Management: Secret Service - Creating an Inspired Customer Service Culture
- 2:30 - 4:20 PM

Contact Lisa Valad, CPE Program Manager cu.cpe@cu.edu

303.837.2156

To Register, visit: http://www.colorado.edu/controller/schedule-and-registration
MEET THE TEAM

POSITION UPDATES

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>New Title/Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>Justin Church</td>
<td>Area Accountant</td>
</tr>
</tbody>
</table>

Liz Kollipara is an Accounting Technician III on CCO’s Sponsored Projects Accounting (SPA) Invoicing and Cash Management Team. Get to know her a little better in our brief interview below.

Please tell us about your prior experience and what brought you to CCO?

Before joining the CCO team, I worked at the Colorado Department of Human Services for four years. I worked in the General Accounting Unit as the Cashier and helped out in Accounts Payable. I also worked in the Program Accounting Unit as the Program Accountant for The Office of Early Childhood, The Commission for the Deaf and Hard of Hearing, and Juvenile Parole Board. I set up access for users in CORE, the state’s financial system, and helped with basic reporting and troubleshooting issues.

As far as my educational background goes, I have a BA in Anthropology from CU-Boulder and a BS in Accounting from MSUD. I live in Longmont, so I was looking for positions closer to home. CU-Boulder would be a great place to work and when I saw the invoicing technician position open, I knew that would be a great fit for me, because it is what I really enjoy doing. I am so thankful to be a part of this team!

What do you find most interesting about your new career position in Sponsored Projects Accounting?

What I find most interesting about my new position is how many projects there are and the complexity of each sponsored project. Every project is unique and paying close attention to detail is so important. I am also really excited about learning a new financial system.

What do you view as the greatest opportunity within this role?

I view the greatest opportunity within this role is working as a team to learn how Elevate PeopleSoft FIN 9.2 works and creating processes that may be different than before.

What best practices would you share with the departments?

I think keeping the communication channels open, and being clear about what is needed and when, are some of the best things we can do to accomplish our tasks.

On a personal note, what do you enjoy doing outside of CCO?

While outside of work, I enjoy spending time with my husband, Sunil, and my dog, Trudy. I love reading, watching movies, completing any kind of puzzle and crafting. I have also started practicing yoga. My husband and I love to travel and we will be going on a trip to Bali in April. I am so excited!