

GEARS Update 3.9.17

All:

Approval Roles – Each department/court should have a primary and alternate approver for all types of transactions, i.e. requisitions, express purchase orders, journals and vouchers. An alternate could then approve items seamlessly if the primary should unexpectedly be out. Please be sure to consider all required approval roles when assigning or modifying security for a user and remember a user cannot have processing and approval authority for the same type of transaction.

FY2017 Year-End – The Department of Budget and Finance (DBF) will soon distribute the complete guidance and supporting documentation for year-end. However, in the meantime, please note that users may begin to enter AY2018 requisitions on Monday, March 13. Please be sure to review the specific instructions below before the process is started. If users should have any questions, please contact Service Now or the Department of Procurement, Contract and Grant Administration.

REQUISITIONS:

1. Associated with AY2018 only:

- a. Can be entered into GEARS on Monday, March 13.
- b. Please start your requisition name with “AY18” for easy identification. As recommended in the past, this naming convention should be used for all requisitions throughout the year. Additional details and information can also be entered in the comments section.
- c. Please ensure that the correct “AY2018” Appropriation Year is referenced in the chartfield distribution line(s).
- d. Please have the requisition approved.
- e. **Do not** budget check the requisition. If a user happens to budget check the requisition, the requisition will receive a budget status of “error”, due to the entry date of the requisition.
- f. The GEARS Team will perform a weekly process to change the accounting and budget dates on the requisitions to coincide with

AY2018 (required) and perform a mass budget check. This process will be done on a regular basis and as needed to allow the Department of Procurement (DPCGA) time to issue the AY18 purchase orders. AY18 purchase orders cannot be used or have any activity associated with them prior to July 1.

2. Associated with AY2017 and AY2018 both:

- a. Must be entered as two separate requisitions.
- b. Can process the AY17 requisition as currently done and complete the full process.
- c. Any AY18 requisitions would need to follow the process and steps noted above in #1.
- d. All requisitions and purchase orders should be done on a fiscal year basis.

Interpreter Invoices – Upon notification that an interpreter invoice needs modified or that it has been denied, the user should reopen the original invoice and make the changes. A “new” invoice should not be created. Please be sure to review the applicable tip sheet on the GEARS site, Viewing/Reopening an Interpreter Invoice. The Court Interpreter Program is offering a webinar on Wednesday, March 15. Please contact Ksenia Boitsova at 410-260-3569 or Ksenia.boitsova@mdcourts.gov for further details.

Security – The security role definition matrix has been revised. Please be sure that the security queries are being run and reviewed on a periodic basis for your department/court. The roles listed for each user can then be cross-referenced to the matrix for further details as needed.

Training – The spring 2017 GEARS training class schedule has been distributed. Sessions will be starting very soon. The schedule includes two types of training sessions:

- Overview sessions for the 9.2 upgrade based on required functionality;
- In-depth functional classes that review processing steps.

Please review the announcement and schedule on the GEARS site for further information and register soon. Remember, users should always review the GEARS site for important guidance on work processes, but may also contact Service Now for assistance.

Travel Policy – As originally announced in December, the Judiciary Travel Policy and form has been revised. In addition, a new rate of .535 cents per mile went into effect on January 5, 2017. As always, all travel information can be found on CourtNet at: <http://www.courts.state.md.us/administration/travel.html>. Please be sure that all submissions are done on the revised form.

Thank you,
Tammy

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