

All:

The GEARS team would like to provide notice to all users of the following announcements and reminders.

**Attachments** - The GEARS system is the official financial system for the Judiciary. As such, it is imperative that the system contain supporting documentation to justify transactions. This means that all vouchers and journal entry transactions must have an attachment. Please ensure that an attachment exists before saving your transaction.

**Security** – The GEARS Team continues to evaluate security and accessibility throughout the system on a regular basis. As such, we have made some recent changes that you may soon see upon logging in. We have removed access to menu options that are not used and we have also reviewed and modified access for specific roles as well. While we do not anticipate issues, if you experience any problems with menus or accessibility to previously used navigation, please contact the Service Desk and we will quickly resolve the issues.

**Training** – The next GEARS training schedule will be announced soon.

#### **PROCURE TO PAY:**

**Acquisition Life Cycle** – An enhancement has been completed in GEARS to assist users with tracking requisitions that relate to a procurement/contract. The GEARS Acquisition Lifecycle is a repository for solicitation, vetting and contract execution activities that occur during an acquisition's lifecycle. Department of Procurement (DPCGA) buyers are able to add as well as update the repository, while non-DPCGA users will have read-only access. Note: Your results may be limited by PCA access. Minimum requirements for inclusion are as follows:

- Requisition  $\geq$  \$25,000
- A Buyer is assigned to the Requisition
- Requisition is in 'Approved' status

For non-DPCGA users, there are two ways to access the Acquisition Lifecycle:

- Manage Requisitions
- Acquisition Lifecycle Search

A Tip Sheet has been created to use this new tool and can be found on the GEARS courtnet site.

**<https://mdcourts.gov/sites/default/files/import/gears/pdfs/tipsheetacquisitionlifecycle.pdf>**

**Fixed Assets** – As indicated in a previous GEARS update, we have started a project to move Fixed Assets into the Judiciary financial system of record, GEARS. As we move through this

project, we will be reviewing our current business processes to identify areas for improvement and for standardization.

As part of the review, we noted that the purchase of fixed assets may have additional associated costs that have been handled differently across the Judiciary. These costs, such as delivery/ shipping/ freight, and training, may cause issues when determining the value of the asset(s).

Given these concerns, effective immediately, for purchases of fixed assets (assets charged to accounts 10 & 11), the costs listed below should be treated as an expense on all requisition(s) and purchase order(s). These costs will not be added to the value of the fixed asset(s) and should be charged to the expense accounts noted below.

- Delivery/shipping/freight – please use account 0826
- Training – please use account 0819

Any costs for installation will continue to be coded to and included in the value of the fixed asset(s) purchased.

**Travel** - When completing an expense account form, please use the official employee name as provided to the payroll department for ACH/direct deposit information. Using alternate versions of your name can cause processing delays or create the need for additional forms to be completed.

**Vendor Maintenance Form** – Please remember that all vendor maintenance forms should include supporting documentation with the request. This would include items, such as the invoice, expense form and/or W-9. In addition, please utilize the vendor name in the email subject line when submitting the form.

If you should any questions about the above information, please feel free to contact me.

Thank you,  
Tammy

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