MESSAGE FROM THE VICE PRESIDENT, ISC

Robin Beck, Vice President, Information Systems & Computing

Dear Colleagues,

New Online Directory Coming: New Features, Capabilities, and Privacy Rules

Penn’s Online Directory is undergoing a major facelift. Scheduled for release early in 2005, the new Directory will offer many new features and capabilities, among them richer information, separate views of information for external and University audiences, and a redesigned online updating utility available to students as well as faculty and staff. Behind the scenes, the Online Directory will share data with other systems, such as U@Penn and PennInTouch, thereby minimizing the need to update the same information in more than one place.

One of the main goals of the Directory is to balance the privacy needs of individuals with the operational needs of the University - to provide a useful set of information for use by faculty, staff, and students while allowing greater control over...

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**BEN Financials Upgrade (Continued)**

### What's Changed

BEN Financials users will notice the following changes:

- BEN Buys will allow you to create, name, and save up to ten favorite charge accounts. This has been one of the most frequently requested enhancements.
- Subtle formatting changes will be apparent when creating requisitions: multiple buttons have replaced drop-down lists; links are used instead of radials for setting the line type on Non-Catalog requests.
- For those users who have PO Manager or General Ledger access, the Home Page will have a slightly different look. All Responsibilities are now considered “Self Service” so you will no longer see a separation between Self Service and Application responsibilities on the Navigation screen.
- A Top Hat Icon used to switch between responsibilities has been added to the tool bar.
- A newer version of Oracle’s JInitiator software needs to be installed on end user workstations. An installation CD was made available to Local Support Providers (LSP’s) in November. During the phased implementation period, LSPs can verify the installation by performing an online Litmus test. A test environment is available now through December 23, Monday through Friday, 9:00 a.m. to 5:00 p.m. for this purpose.

### Key Dates

Following are some important dates to remember about the BEN Financials upgrade.

- **Thursday, December 23, 2 p.m.**: BEN Financials will shut down and the upgrade will begin.
- **Friday, December 31**: December month-end process will be completed in the upgraded environment.
- **Monday, January 3, 8 a.m.**: BEN Financials will be available.

The complete schedule for December month end closing is posted at [https://www.finance.upenn.edu/ben/closing_schedule/Dec04](https://www.finance.upenn.edu/ben/closing_schedule/Dec04) and is also accessible from the Comptroller’s Home Page, under “What’s New.”

### Reminders

1) All work on grants that require closing activities in December must be completed by December 23.

2) Plan ahead! If there are items needed during the Winter Break make sure all orders are placed before 2:00 p.m. on December 23.

3) BEN Reports, Gram, and the Data Warehouse will be available, containing general ledger detail as of December 23.

4) If you are a BEN Financials user, make sure your desktop has been updated. You must have the updated JInitiator file installed on your computer in order to access BEN Financials on January 3.

5) The BEN web site is a handy source of information, especially the BEN Financials advisories and the BEN Helps links: [https://www.benapps.isc-seo.upenn.edu/](https://www.benapps.isc-seo.upenn.edu/)

### Support During the Winter Break

Purchasing Services staff members will be available to assist faculty and staff with purchasing requirements during the Winter Break. During this period, please direct all calls for assistance to the Purchasing Services main phone number at 215-898-7216 and you will be directed to the appropriate staff member. Please visit the Purchasing Services web site at: [https://www.purchasing.upenn.edu/news/041111_01.php](https://www.purchasing.upenn.edu/news/041111_01.php) for winter break coverage days and times.

### Questions about the Upgrade?

If you have any questions or concerns about the upgrade, please direct them to askben@pobox.upenn.edu.

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### Training and Documentation

Because the impact of the upgrade on existing business processes is minimal, existing users will not be required to attend additional training. However, a number of resources will be available to ease the transition to the new application. Beginning this month, the Financial Training Department (FTD) will offer optional demonstration sessions on the changes and new features in BEN Buys. You may register for the demonstration sessions via the Learning and Education online course catalog at the following URL: [http://www.hr.upenn.edu/training_courselibrary/search_criteria.asp](http://www.hr.upenn.edu/training_courselibrary/search_criteria.asp).

From this page, select either “Finance and Accounting” under browse by **Category** or “Finance” under browse by **Department**.

An overview document highlighting the changes will be available on FTD’s website starting on December 13, 2004. All documentation and training material will be revised to include new screen shots and features where applicable. Starting January 3, 2005, revised User Guides and related documentation will be posted on FTD’s website under **Documentation** at: [http://www.finance.upenn.edu/ftd/documentation.html](http://www.finance.upenn.edu/ftd/documentation.html).

Please contact the Financial Training Department (215-573-5603 or training@pobox.upenn.edu) if you have any questions pertaining to BEN Financials training.
# Holiday Schedule

## Weekly Payroll Holiday Schedule for November 2004

<table>
<thead>
<tr>
<th>Pay Period</th>
<th>Weekly Pay Dated</th>
<th>Support Documents For New Appts must reach HR Records by 5 PM</th>
<th>Add'l Pay Forms due in Payroll by 5 PM</th>
<th>Time Reporting by 3 PM</th>
<th>Database Changes to Existing Records before 5 PM</th>
</tr>
</thead>
</table>

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<table>
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<tr>
<th>Pay Period</th>
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<th>Time Reporting by 3 PM</th>
<th>Database Changes to Existing Records before 5 PM</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/5/2004</td>
<td>10 - Dec</td>
<td>29 - Nov</td>
<td>3 - Dec</td>
<td>6 - Dec</td>
<td>6 - Dec</td>
</tr>
<tr>
<td>12/12/2004</td>
<td>17 - Dec</td>
<td>3 - Dec</td>
<td>9 - Dec</td>
<td>10 - Dec</td>
<td>10 - Dec</td>
</tr>
<tr>
<td>12/19/2004</td>
<td>21 - Dec</td>
<td>7 - Dec</td>
<td>13 - Dec</td>
<td>14 - Dec</td>
<td>14 - Dec</td>
</tr>
<tr>
<td>12/26/2004</td>
<td>22 - Dec</td>
<td>10 - Dec</td>
<td>16 - Dec</td>
<td>17 - Dec</td>
<td>17 - Dec</td>
</tr>
</tbody>
</table>

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<tr>
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<th>Support Documents For New Appts must reach HR Records by 5 PM</th>
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<th>Time Reporting by 4 PM</th>
<th>Database Changes to Existing Records before 5 PM</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/31/2004</td>
<td>22 - Dec</td>
<td>10 - Dec</td>
<td>14 - Dec</td>
<td>15 - Dec</td>
<td>16 - Dec</td>
</tr>
</tbody>
</table>

Reminder! January 3rd, 3:00 p.m. is the payroll cutoff for week ending January 2nd. Happy New Year!
## Accounts Payable

<table>
<thead>
<tr>
<th>Day</th>
<th>Date</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday</td>
<td>December 27, 2004</td>
<td>9:00 AM to 2:00 PM</td>
</tr>
<tr>
<td>Tuesday</td>
<td>December 28, 2004</td>
<td>9:00 AM to 2:00 PM</td>
</tr>
<tr>
<td>Wednesday</td>
<td>December 29, 2004</td>
<td>9:00 AM to 2:00 PM</td>
</tr>
<tr>
<td>Thursday</td>
<td>December 30, 2004</td>
<td>9:00 AM to 2:00 PM</td>
</tr>
<tr>
<td>Friday</td>
<td>December 31, 2004</td>
<td>9:00 AM to 2:00 PM</td>
</tr>
</tbody>
</table>

Normal hours resume on January 3, 2005.

## Cashier's Office

<table>
<thead>
<tr>
<th>Day</th>
<th>Date</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Friday</td>
<td>December 24, 2004</td>
<td>CLOSED</td>
</tr>
<tr>
<td>Monday</td>
<td>December 27, 2004</td>
<td>9:00 AM to 3:00 PM</td>
</tr>
<tr>
<td>Tuesday</td>
<td>December 28, 2004</td>
<td>9:00 AM to 3:00 PM</td>
</tr>
<tr>
<td>Wednesday</td>
<td>December 29, 2004</td>
<td>9:00 AM to 3:00 PM</td>
</tr>
<tr>
<td>Thursday</td>
<td>December 30, 2004</td>
<td>9:00 AM to 3:00 PM</td>
</tr>
<tr>
<td>Friday</td>
<td>December 31, 2004</td>
<td>9:00 AM to 1:00 PM</td>
</tr>
</tbody>
</table>

Normal hours resume on January 3, 2005.

## Payroll Office

The payroll office will be staffed over the Winter Break (12/27 through 12/31) during the hours of 9:00 am to 12:00 noon to take phone calls and respond to emails only. There will be no payroll window hours during these times. Phone: 215-898-6301 e-mail payroll@pobox.upenn.edu.

## Purchasing Services

Purchasing Services staff members will be available to assist faculty and staff with purchasing requirements during the University's 2004 winter break. During this period, please direct all calls for assistance to the Purchasing Services main phone number at 215-898-7216 and you will be directed to the appropriate staff member.

During the winter break, Purchasing Services staff members will be available on the following days and times:

<table>
<thead>
<tr>
<th>Day</th>
<th>Date</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday</td>
<td>December 27, 2004</td>
<td>9:30 AM to 1:30 PM</td>
</tr>
<tr>
<td>Tuesday</td>
<td>December 28, 2004</td>
<td>9:30 AM to 1:30 PM</td>
</tr>
<tr>
<td>Wednesday</td>
<td>December 29, 2004</td>
<td>9:30 AM to 1:30 PM</td>
</tr>
<tr>
<td>Thursday</td>
<td>December 30, 2004</td>
<td>9:30 AM to 1:30 PM</td>
</tr>
</tbody>
</table>

## Student Financial Services

<table>
<thead>
<tr>
<th>Day</th>
<th>Date</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thursday</td>
<td>December 16, 2004</td>
<td>9:00 AM to 2:30 PM</td>
</tr>
<tr>
<td>Thursday</td>
<td>December 23, 2004</td>
<td>9:00 AM to 2:00 PM</td>
</tr>
<tr>
<td>Friday</td>
<td>December 24, 2004 thru December 31st</td>
<td>CLOSED</td>
</tr>
</tbody>
</table>

Normal hours resume on January 3, 2005.

## Treasurer's Office

Wire transfers submitted to the Treasurer's Office by 1 PM on December 29, 2004 will be processed in calendar year 2004. Any request that are submitted after the deadline will not be reflected on the g/l until 2005.

## Gifts Accounting & Administration

<table>
<thead>
<tr>
<th>Day</th>
<th>Date</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Friday</td>
<td>December 24, 2004</td>
<td>Tentatively Closed</td>
</tr>
<tr>
<td>Monday</td>
<td>December 27, 2004</td>
<td>9:00 AM to 3:00 PM</td>
</tr>
<tr>
<td>Tuesday</td>
<td>December 28, 2004</td>
<td>9:00 AM to 3:00 PM</td>
</tr>
<tr>
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</tr>
<tr>
<td>Friday</td>
<td>December 31, 2004</td>
<td>9:00 AM to 1:00 PM</td>
</tr>
</tbody>
</table>

## Gift Transmittal Reminder

As we approach the calendar year-end, a reminder of the necessity for the timely transmittal of gifts made to the University of Pennsylvania. It is imperative that all gifts received be sent immediately to the Office of the Treasurer, 433 Franklin Building/6205.

December gifts transmitted in January must be forwarded to Gifts Accounting & Administration (GAA) and must include the postmarked envelope and any original letters pertaining to the gift. Should you receive hand-delivered checks from a donor or messenger, please document the date of receipt and method of delivery. These gifts and subscriptions should be forwarded to GAA by way of the Gift and Subscription Transmittal (forms and instructions for completing forms may be obtained by calling 8-9671, or from the Treasurer's Office website at [http://wwwfinance.upenn.edu/treasurer/centralgifts/gifttrans.PDF](http://wwwfinance.upenn.edu/treasurer/centralgifts/gifttrans.PDF))

CONTINUED ON NEXT PAGE
**STUDENT FINANCIAL SERVICES**

**Spring 2005 Billing Schedule**

<table>
<thead>
<tr>
<th>Mailing</th>
<th>Bill Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dec. 2, 2004</td>
<td>Jan. 6, 2005</td>
</tr>
<tr>
<td>Jan. 12, 2005</td>
<td>Jan. 28, 2005</td>
</tr>
<tr>
<td>Feb. 2, 2005</td>
<td>Feb. 23, 2005</td>
</tr>
<tr>
<td>Mar. 2, 2005</td>
<td>Mar. 31, 2005</td>
</tr>
<tr>
<td>Apr. 6, 2005</td>
<td>Apr. 29, 2005</td>
</tr>
</tbody>
</table>

**HOLIDAY SCHEDULE**

**Gift Transmittal Reminder (Continued)**

The deadline for transmitting gifts to GAA for December processing is **Monday, December 27th at 12:00 noon**. Early transmission of gifts will guarantee December month-end inclusion. As always, exception processing will be determined on a case-by-case basis.

Securities gift inquiries, acceptance, and disposition, are the responsibility of the Office of the Treasurer. Please direct donor and broker inquiries and all correspondence, including postmarked envelopes and/or private courier (e.g., FedEx) packages, promptly to Securities Gifts at the address listed below.

In the event that a gift is received for which a fund does not exist, the gift should still be forwarded to the Office of the Treasurer with instructions that it be deposited into the Gift Suspense account. It is the responsibility of the School/Center to follow up with its Business or Development Officer to ensure that, if a new fund is required, the necessary steps are taken to establish it.

All requests for adjustments and reallocations must be submitted in writing to GAA for both Cash and Securities gifts and all supporting documentation included. All required accounting entries will be completed by the Office of the Treasurer.

If you have any questions, please contact:

**Cash Gifts**
María Perkins  
433 Franklin Building  
Philadelphia, PA 19104-6025  
Email: penngift@pobox  
Phone: 215-898-9671  
Fax: 215-573-5118

**Securities Gifts**
Bobbie Coats  
433 Franklin Building  
Philadelphia, PA 19104-6025  
Email: gifts@pobox  
Phone: 215-898-7254  
Fax: 215-573-5118

Thank you for your cooperation and have wonderful holiday!
Wondering about tuition benefits? Looking for the Faculty Handbook? Logging in to view your pay stub? U@Penn now provides easy access to these and hundreds of other resources Penn employees need in their personal and work lives. First implemented in May 2002 to provide access to personal payroll and benefits information, U@Penn has evolved to become a one-stop employee portal with links to online applications and information from across the University. Try it out at http://www.upenn.edu/u@penn.

The new U@Penn (above) has a look and feel similar to the PennPortal used by students and provides easy access to information Penn employees need in their personal and work lives.

Portal Overview

U@Penn groups information and services from disparate organizations in three easy-to-understand categories known as tabs: General, Business, and Research. On each tab, information is grouped into sections called channels, which contain links to Penn web sites that pertain to the topic of each channel. U@Penn also provides quick and easy access to web-based electronic mail, the Penn calendar, directories, and current news and announcements.

Faculty and staff who log in to U@Penn using their PennKey and password have additional capabilities:

- They can seamlessly access PennKey-secured applications they are authorized to use, such as BEN Deposits, BEN Reports, Web-enabled Salary Distribution (WESD), Penn’s Way Online, and others as they become available. Separate logins are not required for each application. Red locks indicate those applications that require a PennKey.
- Logging in also allows users of U@Penn to personalize the portal by including personal channel choices, headline news sources, favorite web links, and more. Over time, logged in users may see additional channels or tabs relevant to their school or center or position.

For more information on using and customizing U@Penn, please refer to http://www.upenn.edu/computing/uatpenn/usinguatpenn.html.

Payroll and Benefits Enhancements

The expanded U@Penn continues to provide convenient, secure, on-line access to personal payroll and benefits information, via direct links to My Profile, My Pay, and My Benefits. These pages, familiar to users of the original U@Penn, have been enhanced with improved navigation and features. Navigation of these pages is easier than ever, thanks to new information icons and helpful text. My Profile now allows employees to edit their own payroll profile, with updates to home or permanent address, emergency contact information, and work phones. My Pay continues to provide pay stub history. The wealth of information on the My Benefits page has been rearranged to make it more straightforward. PennKey security ensures that personal data is protected and secure.

And as with the original My Profile, My Pay, and My Benefits features, payroll information is not actually stored on the web.

Let Us Know What You Think

We hope that you will take advantage of all that U@Penn has to offer, including both work related and personal compensation, benefits, and health information - even what is happening on campus. If you have suggestions for additional links, comments or questions about using U@Penn, please email us at uatpenn@pobox.upenn.edu.

Craig Carnaroli,
Executive Vice President

Jack Heuer, Vice President,
Human Resources

Robin Beck, Vice President,
Information Systems and Computing
## Purchasing Services News

### BEN Buys Users

A few reminders for all BEN Buys users:

1) The Penn Marketplace will be unavailable between 2:00 PM on Thursday, December 23, 2004 and 8:00 AM on Monday, January 3, 2005.

2) BEN Financials will also be unavailable between 2:00 PM on Thursday, December 23 and 8:00 AM on Monday, January 3, 2005 due to the planned BEN Financials upgrade.

3) During this system outage, BEN Buys users are to use their Purchasing Card to satisfy emergency requirements. To request a temporary adjustment to Purchasing Card spending and transaction limits, contact Pat Baxter in the Comptroller’s Office at 215-898-3606 (e-mail: baxterp@pobox.upenn.edu) by no later than Friday, December 10, 2004.

4) Departments are encouraged to pre-order critical requirements prior to the winter break to ensure an uninterrupted supply of necessary items.

Please contact Purchasing Services at 215-898-7216 in advance of the winter break to discuss any unique or mission critical purchase requirements.

### Purchasing Seminars

Purchasing Services is pleased to announce the availability of new purchasing training seminars designed to better inform faculty and staff on a wide range of purchasing related topics. These new "How-To" purchasing seminars, hosted by Purchasing Services staff members, will be conducted on a regular basis and are open to University faculty and staff. Subject matter experts from within Penn as well as external supplier representatives will be participating in the purchasing seminars.

Pre-registration is required and space is limited so faculty and staff interested in attending a particular session are encouraged to register as soon as the desired session is announced. To register, contact Lisa Cesare in Purchasing Services at 215-898-1398.

A list of seminars to be held in early 2005 is available at: [http://www.purchasing.upenn.edu/buyinfo/seminars.php](http://www.purchasing.upenn.edu/buyinfo/seminars.php)

### Penn Marketplace Suppliers

A complete list of Penn Marketplace participating suppliers is available in the Purchasing Services web site at: [http://www.purchasing.upenn.edu/buyinfo/suppliers/pm_suppliers/](http://www.purchasing.upenn.edu/buyinfo/suppliers/pm_suppliers/)

### Supplier Promotions

Supplier promotions from participating Penn Marketplace suppliers are available in the Supplier Showcase promotions site at: [http://showcase.sciquest.com/upenn/suppmenu.html](http://showcase.sciquest.com/upenn/suppmenu.html)

### Purchasing Services Announcements

At obtain the latest information on purchasing related programs, contracts, and business initiatives, visit the Purchasing Services Breaking News web site at: [http://www.purchasing.upenn.edu/news/](http://www.purchasing.upenn.edu/news/)

### Penn Specific IBM Laptop & Desktop PC Configurations Available in the Penn Marketplace

Purchasing Services is pleased to announce the availability of Penn specific IBM laptop and desktop PC configurations in the Penn Marketplace directly from IBM under the terms of a new partnership relationship between IBM and the University. These Penn specific configurations meet or exceed Information Systems & Computing (ISC) desktop computer recommendations.

The Penn specific contract pricing for these systems reflect a substantial educational discount off of IBM's standard pricing. A new Penn specific IBM PC punch-out web site is in development and will provide additional functionality and support information to faculty and staff when it becomes available in the Penn Marketplace in late 4th quarter 2004.

Additional information is available at: [https://www.purchasing.upenn.edu/news/041031_02.php](https://www.purchasing.upenn.edu/news/041031_02.php)
Address Changes – The deadline is January 12, 2005. We ask that employees change their own address by logging onto the new U@Penn website at [http://www.upenn.edu/u@penn](http://www.upenn.edu/u@penn) and click on the My Profile link in the Pay and Benefits channel on the General tab (center column). Alternatively, they may contact their Business Administrator.

Overpayments – All overpayment must be re-paid in full and forwarded to the Payroll Office by January 10, 2005. If an employee is writing a check it must be for the full amount of the overpayment. No partial payments will be accepted. Overpayments repaid in the following year will have further tax implications to the employee.

Void Checks – All checks that should not have been issued and need to be voided in the payroll system (and have been sitting in someone desk drawer) must be returned to the Payroll Office no later than 1/10/05. If they are not returned before W-2’s are processed the employee’s W-2 will be overstated.

Hand Drawn Checks (HDC) – The last payroll for 2004 will be run on 12/17/04. As we all prepare to leave for Winter Break we will strive to process all HDC within a 2 day window (not the normal 2 to 5 days). We will continue to accept HDC requests through 5:00 p.m. on 12/21/04 (for distribution on 12/23/04).

With the calendar year drawing to a close it will soon be time to start thinking about tax returns. Penn mails your W-2 to your PERMANENT ADDRESS in January of each year, and if your address is not up to date in the payroll system, your W-2 may not reach the appropriate destination.

Address information must be updated by January 12th, 2005 to ensure your W-2 is mailed to the appropriate address.

Note: Your W-2 will be sent to your PERMANENT Address. If you have no permanent address on file in the payroll system your W-2 will be sent to your CURRENT address.

To view and/or change your address information, go to the U@Penn website at [http://www.upenn.edu/u@penn](http://www.upenn.edu/u@penn) or contact your Business Administrator.
There have been some concerns addressed by a few departments in response to the previous memo “Social Security Numbers & International Students/Scholars”. The issue involves the $25.00 fee that is charged for hand drawn check requests as they relate to international students/scholars who did not have social security receipts prior to the payroll deadline. Although there has been minimal impact (approximately 2%) of individuals not making the payroll deadline since the Social Security Administration has instructed international visitors in F and J immigration status to wait for at least 10 days after arrival in the United States to apply for their social security numbers, we have amended the manual check fee assessment.

New international students/scholars employment packages may be forwarded to the Tax Office even if you do not have a SSN receipt. We will hold them in a pending file; once the SSN receipt is received you may fax it to the Tax Office at 215-573-5269. If we receive it prior to the monthly payroll run we will make every effort to process it through prior to the deadline. If the employment package is received in the Tax Office by the monthly deadline (same as HR Records deadline) and the only documentation that is missing is the receipt from SSA the $25.00 fee will be waived. This only applies to individuals who are applying for social security cards for the first time, it does not apply to individuals who have lost their social security card and are applying for a replacement card.

Please feel free to contact the Tax Office at 215-898-6573 if you have any questions regarding this matter.
Mileage Reimbursement Rate

Effective January 1, 2005 the mileage reimbursement rate for personal vehicles being used for business purposes in 2005 is 40.5 cents per mile. This rate should be in effect for the entire calendar year. (Mileage reimbursement rate in conjunction with other moving expenses will be $.14 per mile).

New “Revised” Meals and Entertainment Policy 2358

The new revised Meals and Entertainment Policy No. 2358 includes the following additions and will be effective December 1, 2004:

- Spending thresholds for meals with speakers and perspective faculty recruits
- Guidelines for local meals with other Penn colleagues
- Providing itemized meal receipts for audit purposes

http://www.finance.upenn.edu/vpfinance/fpm/2350/2358.shtml

When submitting Travel and Entertainment Reimbursement forms, attach a C-1A and use these object code guidelines:

<table>
<thead>
<tr>
<th>Meal related items</th>
<th>Charge to:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business meals</td>
<td>5209</td>
</tr>
<tr>
<td>All alcohol</td>
<td>5214</td>
</tr>
<tr>
<td>Meals and/or events that are conducted for the purpose of entertainment</td>
<td>5214</td>
</tr>
<tr>
<td>Business meal / Entertainment associated with lobbying activities</td>
<td>5336</td>
</tr>
</tbody>
</table>

New Procedures When Paying the Travel Costs for Independent Contractors

Per the Tax Office, when paying independent contractors for their travel expenses, you need to attach a copy of their W-9 form, the C-12 form and a copy of the contract (if applicable) to every Travel and Entertainment Reimbursement (C-1) form.

Per Diems for First and Last Day of Travel

There is now a new calculation for per diem on the DOMESTIC per diem pages. For the first and last day of travel, use the new column entitled “First and Last Day of Travel.” Those days are calculated at 75% of the regular M&IE. See example below:

<table>
<thead>
<tr>
<th>City</th>
<th>Meals &amp; Incidentals M&amp;IE</th>
<th>First and Last day of Travel (75%) of M&amp;IE</th>
</tr>
</thead>
<tbody>
<tr>
<td>San Diego</td>
<td>$51.00</td>
<td>$38.25</td>
</tr>
</tbody>
</table>

US Airways Update Re: Bankruptcy

For guidelines on booking US Airways during their current bankruptcy filing, click here:

http://www.finance.upenn.edu/comptroller/travel/news.shtml#Bankruptcy

Amtrak – New Exchange and Refund Policy 11/4/04

Amtrak has a new Exchange and Refund Policy effective 11/4/04. For information on this policy and other, click here:

OFFICE OF THE COMPTROLLER (Continued)

New Moving Policy

Prior to reimbursing anyone for moving expenses, make sure you have read and communicate the new moving policy.


Reallocation Services Update

Recently, an announcement of a new program was made in the September Bottom Line by the Human Resources department concerning a new partnership for relocation services. The new sole source provider is Employee Transfer Corporation (ETC) which replaces the former vendor, Cendant Mobility. (Please refer to page 10 of the Bottom Line at:

http://www.finance.upenn.edu/td/Bottom_Line/Sept04.pdf)

In an effort to ensure that we effectively communicate the value of the relationship as well as the effect to the University community of the process changes, below is additional information:

ETC provides customized relocation services to the University community at no additional cost to the hiring departments. The following are some of the additional advantages of using ETC:

- One point of contact to initiate the candidate/employee
- Local presence
- Provides support and resources for your department, as well as employee and family
- National and international affiliations with major brokers
- Full service relocation center
- Personalized Services

Ease of use, tax compliance and employee satisfaction are our goals in establishing this relationship. For more information, please visit the Human Resources web site at:

http://www.hr.upenn.edu/recruitment/hiringoffice/domesticrelocations.asp

Please be advised, that any hiring department that chooses not to utilize ETC either by using another third party or by contracting with vendors directly to initiate employee relocation, will be charged a minimum fee of $500 instituted by the Payroll Department. This fee is necessary to cover the cost of the administrative effort of monitoring and controlling payment as well as ensuring tax compliance of these transactions and will go into for any transaction entered into after September 15, 2004.

If you have any questions or concerns regarding this matter, please contact either myself Maryann Piccolo at 215-898-8967 mpiccolo@pobox.upenn.edu or Terri Pineiro, Payroll Manager, at 215-898-1443. If you have questions regarding the relocation process in general, please contact Donna Showell-Brown of Human Resources at 215-898-1307 or see the HR web site as listed in the Bottom Line.

PAYMENT POLICY CHANGE

There has been a change in policy related to payment of human subjects. Human subjects are allowed to receive $100 from petty cash funds. Payments in excess of $100 will be made by check payable to the individual by the Office of the Comptroller. For more information on this change, please refer to Petty Cash policy #1506 at:

http://www.finance.upenn.edu/vpfinance/fpm/1500/1506.shtml

and Payment of Human Subject Fees policy #2319.1 at:

http://www.finance.upenn.edu/vpfinance/fpm/2300/2319.1.shtml
the release of personal data. These needs are balanced in the views mentioned above: The Penn View, which will offer more extensive information to authorized users (primarily current faculty, staff, and students) who must log in, and the Public View, which will display a subset of information to anyone searching the Directory.

**New privacy rules for faculty and staff**

Underlying the two views are amendments to the Directory privacy rules for faculty and staff in HR Policy 201. Developed by Penn Human Resources (HR) and the University’s Privacy Officer, in conjunction with ISC and a University-wide Privacy Committee, the rules specify that all faculty and staff must have a minimum listing in the Public and the Penn Views unless they have a compelling privacy or security concern that warrants exclusion from the Directory.

In the Penn View, the minimum information for faculty and staff includes name, School or organization, affiliation (faculty or staff), title (professor, director, etc.), a campus mailing address, a campus phone number, and a campus email address. Importantly, faculty and staff can list their campus organization’s address, phone, and e-mail in lieu of their direct contact information. In the Public View, the minimum information includes only name and affiliation. Aside from the required information, faculty and staff will be able to add, delete, and change data in additional fields to provide a user-tailored listing in the Penn View and Public View.

Faculty and staff currently suppressing their Directory listing will have the minimum information displayed in the new Directory unless they specifically request an exclusion or add additional information themselves. Faculty and staff who wish to be excluded from the Directory for compelling security or privacy reasons will be able to submit a request for consideration by the Office of Audit, Compliance, and Privacy.

**Privacy changes for students**

Students are not required to have a minimum listing in either view, consistent with federal privacy law and Penn policy. They will, however, have easier and more detailed control over the data they do wish to share in both the Penn View and the Public View, and they will be able to exclude themselves from the Directory via the new updating utility rather than through the Registrar’s Office. Any privacy flags that apply in the current Directory will be carried over to the new Directory.

**Views and searching**

Conducting a search yields a table of results with an abbreviated listing for each name found. Selecting a particular name opens the detailed listing for that name. A search in the Public View will yield a maximum of 20 search results, while in the Penn View, authorized users will obtain all results that match their search criteria. Moreover, the data returned may provide more information than is available in the Public View.

**Updating capabilities**

The Directory’s updating utility has been totally redesigned and expanded. Its greatest advantages are the ability to enter many new kinds of information and the flexibility to select different information for each view. For many fields, additional information or comments can be added. You may, for example, show up to four phone numbers and four addresses, or add annotations such as office hours next to your office address or restrictions on the use of a particular phone number. It’s even possible to add a name you are commonly known under if it’s different from your name of record. You’ll also be able to select data for display from U@Penn or PennInTouch, depending on your affiliation. For example, faculty and staff can select their Payroll mailing address and students can select their on-campus residence address. Selecting the information you wish to display in each view is done on an easy-to-use tabbed Web form.

**Preview period and rollout**

Everyone will be given an opportunity to preview and edit their Directory listings before the new Directory goes live. For most people, the default information in their new listings will be the same information that displays in the current Directory, plus any additional information specified in the minimum requirements in the case of faculty and staff. Such additional information will be obtained from their records in University administrative systems.

**Next steps**

The new Online Directory aims to make it easier for people within the University to communicate with each other and gives us all the ability to further protect our personal privacy. In addition, future versions of the printed faculty and staff directory will be based upon information contained in the Penn View of the Online Directory. Watch for upcoming announcements about the Online Directory in the new year, including a University Notification email advising you to preview your listing. In the meantime, if you have questions, please contact new_online_directory@isc.upenn.edu.
The PennERA (Electronic Research Administration) team is currently finalizing plans for an upgrade to the system, tentatively for the first quarter of 2005*. The system will be upgraded from version 9.x to version 10, and is required in order to move forward with production of the development modules (Proposal and Protocol Development). The upgrade provides an opportunity to deliver the latest tools to Penn’s research community, with an enhanced system, new features, and improved navigation.

Who is Affected?

All current users of the PennERA system will be affected, including users of Proposal Tracking, SPIN Plus, and the Human Subjects and Lab Animal Protocol Tracking modules.

Training

Training will be provided prior to the upgrade on the Proposal Tracking and Protocol Tracking modules for the Office of Research Services (ORS) and the Office of Regulatory Affairs (ORA), and a system demonstration will be provided to protocol view-only users including the Office of Environmental Health & Radiation Safety (OEHRS), the Office of Research Support Services (ORSS), the Office of Human Research (OHR), the Office of Research Integrity & Compliance (ORIC), and University Laboratory Animal Resources (ULAR). Online reference and learning materials will be available to SPIN Plus users. More details on training and system demos will be provided to the affected users as implementation approaches.

Access

Access to the upgraded system will be the same as before. There will be no special plugins required to use the PennERA modules, and authorized users will only need to authenticate with their PennKeys and PennKey passwords before accessing the system with a standard web browser.

New Features

Features of version 10 of the PennERA system will include:

- Streamlined appearance and improved navigation
- Multiple browser windows can be opened at the same time
- Detailed audit trails
- Additional security
- Internal messaging system
- Contact management database
- Personal calendar

End User Support

To coincide with the PennERA system upgrade, an end-user support structure will also be implemented. A recommendation is being finalized based on analysis and needs identified by the research community. The tentative plan is to implement a three-tiered support model similar to BEN Helps. The support model will provide a way for users to get answers to operational and technical questions by placing a single phone call to a help-desk number. More information on end-user support will be forthcoming as the plans are finalized.

What’s Next

After the upgrade and near-term activities are completed, the PennERA team will move forward with the planning for the next phase of development. The team will consider several factors, including the assessment of peer-universities’ approaches to electronic research administration as well as Federal demands, initiatives, and requirements to determine which module will go into development next (Proposal Development or Human Subjects or Animal Protocol Development).

Stay tuned for additional activities in Penn’s full lifecycle system for research project development, support, and management.

More Information about PennERA

Additional updates about PennERA will be provided throughout the project. For the most current information, please visit the PennERA web site at http://www.pennera.upenn.edu. If you have any questions, comments, or suggestions, please send an e-mail to pennera@pobox.upenn.edu.

Robin H. Beck,
Vice President of Information Systems and Computing
Andrew B. Rudczynski, Ph. D., Executive Director
of Research Services and Associate Vice President of Finance
Joseph R. Sherwin, Ph.D.,
Director of the Office of Regulatory Affairs

*The projected release date is based on a “window of opportunity” that appears to best balance the introduction of changes with the least disruption of critical operational activities. The planning assumption behind a release date is predicated on the availability and performance of the software products from the vendor from whom we purchased applications. We have every expectation that all software releases as well as testing and training components of the implementation will support release in that timeframe.
Ongoing Activities and Accomplishments

While preparations are underway for the system upgrade, the PennERA team has also made progress on near-term solutions:

**AIS Online**
Improved October 2004. The AIS (Account Information Sheet) is now available as a web-based report in BEN Reports, allowing users to view Proposal Award and Account data, as well as cost share, sponsor, sub contracts, and sub accounts at any time. To access the AIS Online (only for AIS’s that you received notice were set up and ready to be viewed online), go to:

http://medley.isc-seo.upenn.edu/penn_portal/u@penn.php

Click on the Business Tab, click on BEN Reports.

Log in with your PennKey and PennKey password, and click on the “AIS Online” link at the bottom of the page.

**Protocol Summary Benchmark Report**


**Faculty/Reviewer Web Interface**

Assessment of the development of a web-based interface for faculty and reviewers to potentially submit/review/track Animal Protocol and Conflict of Interest information. (Targeted for first quarter 2005.)

**Recommendation for Research Portal**

A recommendation, in alignment with the overall Penn Portal Strategy, for a web portal to serve as one central location for information about research at Penn. The PennERA team is working with representatives from the schools and centers to finalize a design for the Research tab on the U@Penn web site. (Targeted for first quarter 2005.)

**SOMERA Interface**

Interface between PennERA and SOMERA (School of Medicine ERA); contingent on approval from SOM Research Advisory group.

**PennAEs**

Enhancements will be made to PennAEs over the coming academic year; the first series of enhancements, begun in October 2004, include:

- Expanded reporting criteria to allow users to search for “on-site” and “patient id”
- Ability to use common toxicity criteria and grades when reporting a Serious Adverse Event
- Ability to copy an adverse event under one protocol to another protocol based on access permissions to the protocols involved

**PennERS (Effort Reporting System)**

In November, the PennERS project team invited Department Coordinators (DCs) to an informational meeting regarding this project. Departmental Coordinators (previously identified by their Sr. Business Officers) are responsible for facilitating the effort reporting process in their departments.

The goals of the meeting were to:

1. Provide an overview of PennERS
2. Discuss the administrator’s critical role as a DC
3. Discuss training expectations
4. Discuss the upcoming pilot (tentatively scheduled for late January 2005)
5. Prepare for rollout and discuss its schedule
6. Discuss end-user support

Questions about the PennERS project can be directed to effort@pobox.upenn.edu.
### Service Centers – Depreciation

The Office of Research Services in cooperation with the Office of the Comptroller has developed a procedure whereby University Service Centers will be able to recover the annual depreciation expense of assets that were purchased for and used in these service centers. The new procedure is below and is effective for FY05. Questions regarding this procedure should be directed to Bob McCann, Director of Cost Studies at mccannr@pobox.upenn.edu.

Depreciation expense of equipment purchased for service center operations is an allowable cost of the service center. Departments wishing to include the annual depreciation expense of equipment purchased for service center use in the billing rates charged for the services provided may annually send a detailed list of the equipment items used and needed for the service center to the Office of Research Services for review and approval. The list must include the following information:

- Item description
- Penn barcode number
- Purchase Order number
- Annual depreciation expense and depreciable life of the asset

ORS will review the annual depreciation expense amount and if approved will forward the information to the Comptroller’s Office. The Property management group in the Comptroller’s Office will prepare the journal entry and charge the service center for the amount of the depreciation expense. The school’s depreciation account will receive the credit for the charge.

The depreciation expense and life years must match the annual depreciation schedule and asset life in the Property Management system.

This procedure is effective for FY05. Prior year depreciation expense can not be included.

### ORS Review of Sponsored Projects Expenditures During the Closeout Period

The Office of Research Services is responsible for the preparation of interim and final financial reports. As a part of that process, ORS accountants may review certain expenditures which have been incurred on the award (Sponsored Projects Policy Nos. 2107 and 2126.) Expenditures may be reviewed for allowability, reasonableness, and allocability. (Please see [http://www.upenn.edu/researchservices/faq.html#allowability](http://www.upenn.edu/researchservices/faq.html#allowability) for more information on these topics.)

As part of the University of Pennsylvania’s program to ensure compliance with the terms and conditions of awards, ORS may question select high risk expenditures as well as those that have, as a class, been highlighted in the University’s grants assessment program. As a result of this review, the department may be requested to provide further information regarding expenditures. These inquiries are made to ensure that expenditures are made in compliance with the terms and conditions of the award and that if findings have been made during the grants assessment process, that the charges have been appropriately handled. While the questioned costs may often be appropriate, they are in areas that have been found to be high risk in audits across the nation. Costs commonly questioned include:

- Charges for costs such as office supplies, administrative salaries, or similar costs which are generally considered F&A costs. See [http://www.upenn.edu/researchservices/faq.html#A21](http://www.upenn.edu/researchservices/faq.html#A21) or pages 4-6 in ORS’s October 2003 Newsletter for more information.
- Charges which appear as though they may have been charged to an incorrect object code such as a charge to “Lab Supplies” for an Office Depot purchase.
- Charges for Travel and Entertainment which appear to be questionable (due to vendor name, amount, terms and conditions of award, etc.) ORS does not require the submission of back up documentation to the Accountant.

ORS merely requests an email which explains why a particular charge is appropriate/allowable on the award and which provides verification that the required documentation is available at the department and the expense was approved by the PI and documented as such. Responding to these requests should not require extensive amounts of time since the department is already required to have documentation organized and readily available for audit purposes.

CONTINUED ON NEXT PAGE
It is important that these requests are responded to in as timely a manner as possible. Based upon the due date of the financial report, the Accountant will provide a deadline for the response (generally one week). If a response is not received, the report will be submitted without the questioned expenditure. The questioned charge will be transferred to the department’s 0 fund. If the department requires additional time to respond, the Accountant will normally approve a request for more time provided that this will still permit the FSR to be submitted on time.

Please note that not all expenditures which fall into one of the categories listed above will be questioned at closeout. The receipt of an email by ORS as justification for the expenditure does not in and of itself guarantee the allowability of the expenditure. It is the PI’s responsibility to ensure that the costs that have been charged to the award are appropriate, are in consonance with the approved budget and goals of the project, and that proper documentation is available in the department. (Please see Sponsored Projects Policy No. 2106 for more information on financial responsibility.)

Anyone who is responsible for the administration of sponsored project is strongly encouraged to attend a two day training program offered by ORS. Sponsored Programs at Penn will be offered during the upcoming winter months. Please watch the ORS Newsletter for announcement of future dates.

Please review these forms and instructions carefully. Revisions have been made to the Proposal Transmittal and Approval Form in order to address the changing regulatory environment, and to address concerns and suggestions from the Penn community. While additional information is sought relating to “requested” budgets, export controls and select agents, the need for Social Security numbers has been eliminated from the form.

The new subaccount worksheet is to be used when a subaccount or a change in distribution between existing subaccounts is requested. This form has been created to provide consistent information to the pre-award staff and minimize data entry errors.

While it is strongly encouraged that the revised transmittal be used immediately, in order to allow for a smooth transition, the use of the new form is not mandatory until October 1, 2004.

For proposals submitted by faculty of the School of Medicine, the revised transmittal will not be required until it becomes available in SOMERA. Any questions relating to these forms should be directed to Pamela Caudill at caudill@pobox.upenn.edu.
The current procedures used to establish Account Information Sheets for payments relating to commercial clinical trial agreements have been reviewed by ORS with the School of Medicine and Departmental BAs. In order to provide more efficient reporting of such payments and reduce unnecessary paperwork, the following is the procedure to be followed effective September 27, 2004.

Title: Procedure for Establishment of Awards, Account Information Sheets and Extensions for Commercial Clinical Trial Agreements

1. In submitting research proposals on commercial clinical trial agreements, Departmental BAs, in consultation with the PI, will establish project periods that realistically capture the likely duration of the clinical trial, including the monitoring and data analysis aspects that follow patient recruitment. This project period shall be entered on the Proposal Transmittal Sheet and Approval Form.

2. Departments will endeavor to negotiate budgets that include significant non-refundable advance payments to cover the initial costs of preparing and conducting the clinical trial. ORS staff negotiating commercial clinical trial agreements will work with the Departments in this process. Determination of final budgets shall rest with the Department and School.

3. Upon obtaining partial execution of a commercial clinical trial agreement and a signed Advance Account Request from the Department, an advance account will be established to enable the Department to establish family accounts. The account will be frozen upon creation by setting the end date to the date that the fund is created. An initial AIS will be produced at this time, PBUD will be set at the amount of the Advance Request and PBIL will be set to zero. Upon complete execution of the commercial clinical trial agreement, the account will be unfrozen by extending the end date six months past the date of execution with the understanding that any charges not covered will be handled in accordance with the Advance Account Request. Another AIS will be produced and sent to the Department at that time. If the commercial clinical trial agreement is not executed within three months after the initial account creation or if an approved request to extend the advance account is not received, the advance account will be disabled at ORS. When the first payment is received, the project period will be set for the time period specified in the Agreement (if not specified in the contract, as detailed on the Proposal Transmittal Sheet and Approval Form) and PBUD/PBIL will be set at the amount of the check and another AIS will be produced and sent to the Department.

4. If no Advance Account is requested by the Department, a fund will be created at the time the first check is received in ORS. An AIS will be produced for the amount of the check and PBUD/PBIL will be set at the amount of the check.

5. No Account Information Sheets will be issued on a per check basis to update for actual checks received. PBUD/PBIL will be increased as checks are received. Departments need to i) carefully monitor expenditures ii) track cash receipts with Fund summary report and iii) cover any over drafts which result on the account. At the specific request of the Department, copies of checks will be made available.

6. Unless the fund is extended, ORS will close out the fund within 90 days of the end date and will transfer any overage or shortage to the department as appropriate. Accounts shall be extended by the following procedures:

i) If the Agreement allows extensions without Sponsor approval, PI shall make a request to the Departmental Senior BA for an extension. Senior BA will review with the PI the request and determine if appropriate to grant the extension, considering continuing patient enrollment or other activities and anticipation of payments from the Sponsor. If Senior BA/Department approves, the extension request will be sent to the School for approval. Upon such approval, ORS staff will extend the end date and a new AIS will be generated at such time.

ii) If the Agreement does not allow extension without Sponsor approval, the Department and PI shall notify the Sponsor of the need to extend the contract and the reasons why such extension is needed. Necessary amendments to the Agreement to extend the account should be obtained by the Department and then forwarded to ORS for processing and execution. Once an executed amendment is obtained, ORS staff will extend the end date and new AIS will be generated at such time.
### Upcoming Programs

Further your professional and personal development by taking advantage of upcoming Human Resources programs offered by the department of Learning and Education. Note that you must pre-register for all programs.

Visit the online Course Catalog at [http://www.hr.upenn.edu](http://www.hr.upenn.edu) (click on Course Catalog at top of page), or contact Learning and Education at [http://www.hr.upenn.edu/learning](http://www.hr.upenn.edu/learning) or 215-898-3400.

<table>
<thead>
<tr>
<th>December</th>
<th>January</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Writing Efficient Email</strong></td>
<td>Career Focus Brown Bag:</td>
</tr>
<tr>
<td>$50</td>
<td>FREE</td>
</tr>
<tr>
<td>December 1</td>
<td>Self-Assessment – Put Your Skills to Work</td>
</tr>
<tr>
<td>9am to 12pm</td>
<td>January 21</td>
</tr>
<tr>
<td><strong>Brown Bag Matinee:</strong></td>
<td>12pm to 1pm</td>
</tr>
<tr>
<td>The Cuban Missile Crisis – <strong>Decision Making and Its Consequences</strong></td>
<td><strong>Transitioning to Management</strong></td>
</tr>
<tr>
<td>FREE</td>
<td>Begins January 25</td>
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<tr>
<td>December 8</td>
<td>at Penn</td>
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<tr>
<td>12pm to 1pm</td>
<td><strong>Learning and Education Program:</strong></td>
</tr>
<tr>
<td><strong>Career Focus Brown Bag:</strong></td>
<td>$50</td>
</tr>
<tr>
<td>Helping Hand – Coaching Skills for Managers</td>
<td>December 17</td>
</tr>
<tr>
<td>FREE</td>
<td>12pm to 1pm</td>
</tr>
<tr>
<td>December 17</td>
<td><strong>In addition to these programs, the Quality of Worklife department</strong></td>
</tr>
<tr>
<td>12pm to 1pm</td>
<td>provides assistance with work and life challenges, work and family issues, and health promotion and wellness. Workshops on these topics are offered throughout the semester. For one-on-one assistance with dependent care issues and personal well-being, contact Penn’s Employee Assistance Program (EAP) and Work &amp; Family Services provider, Penn Behavioral Health, at 1-888-321-4433 or go online to <a href="http://www.hr.upenn.edu/quality/wellness/eap.asp">http://www.hr.upenn.edu/quality/wellness/eap.asp</a>.</td>
</tr>
<tr>
<td><strong>In addition to these programs, the Quality of Worklife department</strong></td>
<td>**If you have questions on QOWL programs, contact Human Resources at <a href="mailto:orn@hr.upenn.edu">orn@hr.upenn.edu</a> or 215-898-5116. Or visit our website at <a href="http://www.hr.upenn.edu/quality/default.asp">http://www.hr.upenn.edu/quality/default.asp</a> for more information.</td>
</tr>
</tbody>
</table>

The always-entertaining John Cleese leads this video training on delegating and coaching. Learn how to increase the ability and productivity of your staff. Taking more time to coach creates more time for work!

Identify your strengths and areas for development to leverage them to career success. Through a short video and several exercises, you will clarify your strengths and answer important questions to help you determine what is a good “career fit” for you.

New managers face unique challenges in the workplace, and this program is designed to help you transition into your new role with ease. Learn the difference between working and managing, and understand why the delegation of work is a necessary skill. Receive guidance on establishing credibility and authority as a supervisor, and learn techniques for managing performance issues in the workplace.
The current schedule of financial training courses is available at:

Course descriptions for these training courses can be found at
http://www.finance.upenn.edu/ftd/courses.html

To register for Purchasing Card, Sponsored Programs
or Review - Q & A training go to:
http://www.hr.upenn.edu/training_coursecatalog/search_criteria.asp

For BEN Deposits access, complete the BEN Deposits access form found at
http://www.finance.upenn.edu/ben/bendep/
Once completed, an email will be sent with instructions for on-line training.

To register for all other training courses, complete the Financial Training
Registration Form found at http://www.finance.upenn.edu/ftd

Instructions: The following five questions can be answered based solely on information or web addresses contained in this issue of The Bottom Line. To participate in the contest, please submit your answers via email to training@pobox.upenn.edu no later than January 1, 2004. Please note that entries will only be accepted via email! Two winners will be selected randomly from all correct responses. Winners will receive a Faculty Club membership for the upcoming year.

1. Name one change for the BEN Financials Upgrade.
2. What is the cutoff date for Payroll, week ending January 2, 2005?
3. Fill in the blank. The depreciation expense and life years must match the annual depreciation schedule and ______ ______ in the Property Management system.
4. What is the last day for transmitting gifts to guarantee processing for FY04?
5. What is the new ethnicity code for 'declining to identify'?

Last issue’s winners: Sophie Lucecky and Phillip Seamon! Congratulations! We'll be in touch.

Eligibility: Members of the Financial Training Department and previous winners from fiscal year 2004 are prohibited from winning this contest.