



The Bottom Line



Penn Profiler Knowledge Link

Identifying your compliance training needs

DECEMBER/JANUARY ROLLOUT OF PENN PROFILER

Penn Profiler will begin rolling out to the Penn community in the December/January timeframe. This tool identifies training needs and assigns appropriate courses directly to an individual in Knowledge Link; the University's learning management system. Required training needs are determined by a 5-10 minute online survey based on academic activities and job responsibilities. (See the September 2007 issue of *The Bottom Line* for further details.)

Implementation of the Penn Profiler will be on a rolling basis across the University and individuals will receive an email message over the next few weeks inviting them to complete the survey within 30 days. This email will confirm the availability of Penn Profiler and provide the URL to access the application.

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COMING SPRING 2008 BEN ASSETS

In the **Winter of 2008**, The Division of Finance, in collaboration with Information Systems and Computing will be **replacing** the existing **Property Management System** **with** an integrated software solution called **BEN Assets**.

Existing Property Administrators will be **required** to complete **training beginning in Spring 2008**. Please look for further details in January 2008.

ACCESS TO KNOWLEDGE LINK FOR INDIVIDUALS WHO ARE NOT UNIVERSITY EMPLOYEES

There are a number of situations in which an individual, who is not an employee of the University but is associated with Penn, is required to access Knowledge Link to register for a course and/or participate in on-line training. For an individual to utilize Knowledge Link they must have a PennCard with the proper affiliation status.

If your department has such a situation, please have the individual complete a PennCard Request Form

<http://www.businessservices.upenn.edu/penncard/forms/penncard.pdf>

The "Status of PennCard Recipient" in Section I of the form should be listed

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Office of the Comptroller

Year End Payroll Dates – 2007

Hand Drawn Checks (HDC) – The last payroll for 2007 will be run on **12/17/07**. As we all prepare to leave for winter break we will strive to process all HDC within a 3 day window (not the normal 3 to 5 day). We will continue to **accept HDC request through 5:00 on 12/18/07 (for distribution by 5:00 on 12/21/07)**. Payroll Administrators should inform employees not to call the Payroll Office for a check status. The Payroll Office will contact the employee when the check is ready for pick-up.

January 4th 2008 Payroll – Please note that this payroll will run on **Wednesday 1/2/08** (the first day after Winter Break).... What does this mean to you? All **time reporting** must be entered into the system by **Wednesday, 1/2/08 at 3:00 p.m.**

Important Payroll Dates Re: W-2's

Overpayments – For W-2 purposes, all overpayments must be **communicated** to the payroll office **by 12/19/07**. All overpayment **must be paid** in full and to the payroll office **by 1/4/08**. 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 – For W-2 purposes, 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 perhaps) **must be returned to the payroll office no later than 12/19/07**. If they are not returned before W2's are processed the employee's W2 will be overstated and W2c's will be required.

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W-2 MAILING: IS YOUR ADDRESS UP-TO-DATE?

The calendar year is drawing to a close which means that 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 **permanent address** is not up to date in our payroll system, your W-2 may be delayed or even lost.

Please 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 www.upenn.edu/u@penn or contact your Business Administrator. **Again, your address must be updated no later than January 9, 2008.**



Office of the Comptroller

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Foreign National Social Security Numbers - If a person was issued a temporary social security number from the University of Pennsylvania upon your hire and have now been assigned a valid Social Security number, and have not already provided the Payroll Office with this updated information, please bring a copy of your social security card to the Payroll Tax Office **by 12/21/07**.

The **Payroll Tax Office** is located in the Franklin Building at 3451 Walnut Street, Room 310. If you have any questions please contact the Payroll Tax Office at **(215) 898-6573** or **(215) 898-1543**.

PAYROLL COVERAGE FOR WINTER BREAK

The payroll office will be staffed over the Winter Break (**12/26 through 12/28**) during the hours of **9:00 a.m. to 12:00 p.m.** to take phone calls and respond to emails only. There will be no payroll window hours.

PAYROLL TAX CHANGES FOR 2008

Federal, state and local government have established the following tax rates and limits effective **January 1, 2008**.

- Social Security taxable wage base increased to **\$102,000.00** (up from 97,500.00 in 2007)
- Social Security Tax maximum withholding increased to **\$6,324.00** (up from \$6,045.00 in 2007)
- Philadelphia City Wage Tax for Residents – reduced to **4.219%** (down from 4.2600% in 2007)
- Philadelphia City Wage Tax Non-Residents – reduced to **3.7242%** (down from 3.7557% in 2007)
- Pennsylvania Unemployment Tax withholding rate – reduce to **.06%** (down from .09% for 2007)

The new tax rates are effective for all payroll checks dated on or after January 1, 2008.

Student Financial Services Spring 2008 Billing Schedule

E-Bill Sent:

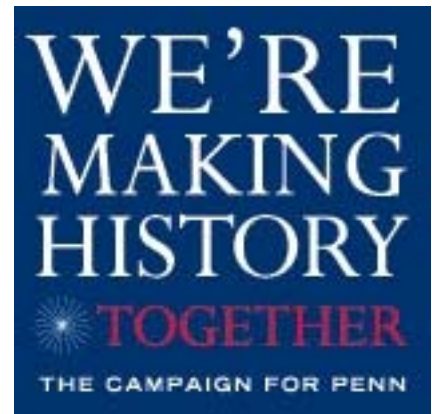
December 05, 2007
January 09, 2008
February 07, 2008
March 04, 2008
April 02, 2008

Bill Due Date:

January 04, 2008
January 25, 2008
February 25, 2008
March 26, 2008
April 25, 2008

***Spring 2008 financial drop/add
begins on January 10, 2008***

OFFICE OF GIFTS ACCOUNTING & ADMINISTRATION



DECEMBER 2007 YEAR-END GIFT PROCESSING DEADLINES

As we approach year-end, please be advised of the following closing guidelines for gifts.

December 31 Gift Date end of year processing:

- **January 14:** Last date to deliver to Gifts Accounting & Administration **December 2007 - FY08 gifts** (need December 31 postmark)
- **January 15, 16, 17:** Gifts Office will close for year end processing
- **January 18:** Gifts Office will reopen for deliveries
- **January 22:** Begin reporting
Gifts will be processed with a December 31 gift date, so long as they are postmarked on or before December 31, 2007. Therefore, it is imperative to send fully completed gift transmittals and backup information, including postmarked envelopes, to Gifts Accounting & Administration (GAA) for December 31 gift date processing as quickly as possible.

All December 31 postmarked donations must be received in Gifts by Monday, January 14, 2008.

Notify Jean Suta or Kathy Nace in Securities Gifts (jeanie@pobox.upenn.edu) or 8-7254 of any **securities gifts as soon as you are made aware of them**. Securities gifts must be transferred into a Penn brokerage account **by noon on December 31**.

Any questions on this information, should be directed to Maria Perkins (8-8687), Jean Suta or Kathy Nace (8-7254) in the Treasurer's Office.



*Thank You,
Jules Spaeth, Director*

OFFICE OF GIFTS ACCOUNTING & ADMINISTRATION AND SECURITY GIFTS WINTER BREAK SCHEDULE

December 24, Monday Closed
December 25, Tuesday Closed
December 26, Wednesday 9:00 – 3:00

December 27, Thursday 9:00 – 3:00
December 28, Friday 9:00 – 3:00
December 31, Monday 9:00 - 1:00
January 1, Tuesday Closed



PENNERA: PROPOSAL DEVELOPMENT UPDATE

The PennERA (Electronic Research Administration) system was recently upgraded in an effort to accommodate the rapidly changing landscape of electronic research administration. Following is information about new system functionality, an update on training, newly completed activities, and activities under development.

PROPOSAL DEVELOPMENT ENHANCEMENTS

The PennERA upgrade included the following enhancements in Proposal Development:

Budget/Personnel

- Monthly salary calculation—the software can now calculate salaries on a monthly basis, as well as on a per-day basis as it has previously.
- Continue salary past appointment end date—allows the salary associated with an appointment to be extrapolated beyond the actual appointment start and end date.
- Recycle salary on the annual anniversary (respecting effective dates)—allows personnel appointments to be applied to future periods without added data entry. This functionality will likely be the choice for Schools and Centers that show an academic and summer appointment where the salary is expected to go up with a standard inflation.
- Salary ends on the appointment end date—the system will not extrapolate the salary appointments nor will the salary be “recycled.” This functionality was added to

support the need in both prime and subcontract budgets where the anticipated salary in out-year(s) cannot be arrived at by a standard inflation rate.

Funding Opportunities

- Ability to search for funding opportunities by NIH Program Announcement.

Currently, Proposal Development can be used for NIH funding opportunities and use remains voluntary for the supported mechanisms. The up-to-date list of proposal mechanisms for which PD can be used is available on the PennERA web site at

http://project.pennera.upenn.edu/project/current_phase/PDfundingopps.pdf.

PROPOSAL DEVELOPMENT TRAINING

In October 2007, a revised Proposal Development training curriculum was created and offered to new and current administrative users. Two types of training were offered:

- Basic Training (for new users), which included a Knowledge Building tutorial (prerequisite) and a hands-on training session
- Advanced (Budgeting) Training, which emphasized budget development (only for users who had previously completed the new Basic Training course or the previously offered course called “PennERA - Proposal Development System Training for Administrators”)

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PENNERA: PROPOSAL DEVELOPMENT UPDATE

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PROPOSAL DEVELOPMENT TRAINING *(CONT'D)*

During October, another group of users was trained on the Proposal Development system using the revised training curriculum. The PennERA team is currently scheduling future training sessions for administrators; please check the [Knowledge Link](#) web site for future training dates and registration information at <http://knowledgelink.upenn.edu>.

Investigators have automatic access to the application and do not have to attend hands-on training. Optional orientation sessions for investigators will be available; investigators should check with the Research Representative in their Schools for more information (see <http://project.pennera.upenn.edu/contacts.asp>).

PROPOSAL PIPELINE REPORTS NOW AVAILABLE

Proposal Pipeline Reports show data for proposals created in PD that have been submitted for internal review, and provide administrators and those on proposal routing paths with the list of proposals they have in progress and the status of these proposals.

- The two Pipeline Reports are:
 - PD Pipeline Report – Shows all proposals for which a user is in the routing path or proposals a user can access within PennERA
 - PD Grants.gov Report – Shows all proposals currently being submitted to Grants.gov or proposals that have been submitted to Grants.gov within the last 14 days
- Authorization for access can be obtained by completing the Ben Reports Access Request form available at

<http://www.upenn.edu/computing/da/dw/benreports/Formbenrpts.pdf>. Access to the Pipeline Reports is limited to those individuals who have responsibility for large numbers of proposals in the review and submission process. The same information can be obtained for individual proposals by viewing the Finalize tab in the specific proposal record.

- To access the reports:
 1. Go to the U@Penn Portal at www.upenn.edu/u@penn.
 2. Click the Research Tab.
 3. Click on “BEN Reports” under the Research Administration Tool Box section.
 4. Log in using your PennKey and PennKey password.
 5. At the Ben Reports page, go to the Sponsored Programs section and click on the report you wish to view.

NEW PROPOSAL DEVELOPMENT REFERENCE MATERIALS ON PENNERA WEB SITE

There are new Proposal Development reference materials available on the PennERA web site including:

- When to use PD – A list of proposal mechanisms for which PD can be used
- PD versus PureEdge – A chart that provides information on the key benefits of PD compared to PureEdge
- Routing & Approval paths – Documents that show the complete routing and approval paths for each ORG currently using PD

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Electronic Research
Administration

PENNERA: PROPOSAL DEVELOPMENT UPDATE

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NEW PROPOSAL DEVELOPMENT REFERENCE MATERIALS ON PENNERA WEB SITE *(CONT'D)*

- Quick Reference Guides (QRGs) – Help guides for Investigators and Reviewers/Approvers, a Proposal Development FAQ, a document on Proposal Development Personnel Changes, and a Generic Sponsor Form Reference Guide

These materials can be accessed from the left toolbar on the main PennERA page at <https://www.pennera.upenn.edu/>.

COMING SOON

- **Generic Sponsor Form** – A form that can be used when a sponsor does not have a specific form set. This form increases the potential sponsors for which PD can be used to submit proposals. A pilot is currently being planned, and pilot participants will be contacted directly and offered demo sessions and reference materials.
- **Electronic Human Subjects Protocols Submission System** – A system that will allow the creation, submission, electronic routing and approval of Human Subject Protocols to the IRB, including the ability to submit Continuing Reviews and Modifications to an existing Human Subjects protocol. The team is preparing to pilot the system in November/December 2007.

Benefits of the system include:

- Mitigation of risks through integration that supports the University's research mission, by automatic alerts at the time a protocol is submitted to other University review units
- Ability for IRB Board Members to electronically review Human Subject Protocols
- Transparency of the operation
- Secured accessibility to information, including historical data
- Ability for Investigator to reuse data and reduce manual efforts associated with submission of protocols
- Ability to electronically route for approvals and review
- Automatic generation of alerts/notifications based on status changes

MORE INFORMATION ABOUT PENNERA

For more information about PennERA, please visit the PennERA web site at <https://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*

*--Pamela S. Caudill, Executive
Director of the Office of Research
Services*



WHAT'S NEW IN PURCHASING SERVICES?

All purchasing related announcements are listed in the "News" section of the Purchasing Services web site at: <http://www.purchasing.upenn.edu/news>

New Supplier Discount Pricing Agreements

The following supplier discount pricing agreements have been awarded during the past quarter:

- Total Video Products - Projector Bulbs
- Fermentas Incorporated - Molecular Biological Products
- Airgas Dry Ice - Dry Ice
- Enterprise * - Car Rental
- Tier Environmental Services - Hazardous Waste Removal
- Air France * - Airline travel
- Continental * - Airline Travel
- IKON Office Solutions - Copier Contract Extension
- New England Biolabs - Biological Products
- Contracts awarded in collaboration with the Travel Office

New Competitive Bidding Commodity Projects

New commodity projects launched during the past quarter:

- Promotional Products
- Fleet Management Services
- Corning Research Products

New Penn Marketplace Suppliers

The following suppliers have been recruited for the Penn Marketplace during the past quarter:

- Fermentas Incorporated
- Airgas Dry Ice
- MJ Research (available through Bio-Rad Laboratories)
- MP Biomedicals
- Carolina Biological
- Midwest Scientific
- Zymo Research
- Stoelting Company
- Biotage



NEW IMMIGRATION PROCEDURES FOR ENTERING JAPAN

Beginning November 20, 2007 the Japanese Ministry of Justice will require fingerprints and a photograph from all foreign nationals entering Japan as a part of their immigration procedures. Failure to submit to fingerprinting or the photograph will result in denied entry into Japan. Exceptions to this new requirement include diplomatic personnel, those holding permanent Japanese resident status, and persons under 16 years of age.

The purpose of this new program is to further enhance security and guard against potential terrorist or foreign criminal entry into Japan.

New Immigration Procedures:

1. Submit passport to the immigration control officer.
2. Place index finger of both hands on a digital fingerprint reader.
3. A facial photograph will be taken using the camera above the fingerprint reader.
4. The immigration control officer will conduct a short interview.
5. The Ministry of Justice acknowledges potential impact on processing time into Japan, and hopes to maintain a 20-minute maximum wait time for clearance lines.

MILEAGE REIMBURSEMENT 2008

Effective January 1, 2008 the mileage reimbursement rate for personal vehicles & moving for 2008 are listed below:

From	To	Standard Mileage	Moving Mileage Only
01/01/08	12/31/08	50.5 cents	19 cents
01/01/07	12/31/07	48.5 cents	20 cents

DECEMBER ROLLOUT OF PENN PROFILER

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Users will only need to authenticate with their PennKey and PennKey password before accessing the system with a standard web browser.

Penn Profiler presently contains sections covering Administration and Finance, Sponsored Projects, Environmental Health and Radiation Safety, Animal Care and Use, Human Subjects Research, and Clinical Care. The tool was designed with the functionality to add additional sections as needed.

Completing the Penn Profiler survey is mandatory for all full and part time Penn faculty and staff including student workers, adjuncts, and temporary employees, and must be completed at least annually (more often if an individual's job responsibilities change).

Project Website:

<http://www.upenn.edu/VPR/profiler/>

Project Team email address:

PennProfiler@pobox.upenn.edu



ACCESS TO KNOWLEDGE LINK FOR INDIVIDUALS WHO ARE NOT UNIVERSITY EMPLOYEES

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as "Guest" Check the box for "Other" and write in "SERVICE PROVIDER" on the adjacent line.

Once the form has been approved by the sponsoring department the individual should bring it to the PennCard Center, along with an official photo ID. Note that (as with any new employee) there will be a short (1-2 day) lag time while the individual's information is loaded into the Penn Community database and then into KnowledgeLink.

If the individual encounters a problem accessing Knowledge Link they should contact the Knowledge Link Help Desk at 215-615-2710 or email

KnowledgeLink@uphs.upenn.edu

Note: Individuals affiliated with the School of Medicine should follow the SOM-specific instructions located at:

http://www.med.upenn.edu/somis/pennkey.html#som_guests.

DID YOU KNOW...

...the e-mail address concerning the **Purchasing Card** or **PaymentNet** has been changed to pnet@pobox.upenn.edu. Please use this e-mail for any questions or concerns about the Purchasing/Fleet Card, PaymentNet.com, and or P-card Training.

...When creating '**non-catalog**' requisitions, it's best **not to use characters** (#, *, %, etc.) in the **description field**.

...If you need to know which **access form** is **required** for which **financial training** class(es), check out this website <http://www.finance.upenn.edu/ftd/Training & Access Forms.htm>