A new look is coming to the Concur travel and expense management application, scheduled to go live on January 20, 2015. The new, more intuitive interface will have an updated look and feel, with enhancements to workflow processes, a new dashboard feature, and improved navigation. There are no backend or system processing changes.

**Who Is Affected?**

All faculty, staff, and students who use Concur to create, submit, or approve expense reports or book travel will be affected.

**What Will Change?**

Changes will include:

- Enhanced Home, Travel Booking, and Expense pages with improved navigation and a modern consumer-based application look and feel
- A streamlined travel booking workflow process and summary
- Consistent terminology and iconography across all product lines – including Travel and Expense
- A dashboard design with logical grouping of like functions and tasks to minimize the number of pop-ups or pages required to complete a specified task
- A facts and stats section with key metrics and other helpful information
- Actions, alerts, and notifications that are clearly defined and visible
- Vastly improved smart matching of expenses and receipts as a result of combining key functions on the same page
- New “Work to Zero” feature that clearly shows the number of outstanding tasks at the top of the page so users will see all at a glance and can resolve accordingly, which improves management of tasks

Continued on page 8

The University and Health System online learning management system will feature an updated interface beginning December 2, 2014. While users should be able to quickly navigate their way around the updated layout, there will also be a number of new features, including:

- A configurable home screen with a cleaner look and feel
- An enhanced and more intuitive search engine
- More information at a glance available on your Learning Plan
- Any courses due on a repeating basis appear on your Learning Plan no more than 120 days prior to their due date
- A similarly updated look and feel on the ‘My Team’ tab for Managers

For more information on these updates or on Knowledge Link in general, please see: http://knowledgelink.upenn.edu, or send your questions to kl_help@lists.upenn.edu.
Did you know that you can elect not to have your W-2 printed and mailed to you?

ADP, our W-2 provider, offers individuals the option to suppress the printing of their W-2 and allows you to securely view and print your W-2 from your personal computer. By going paperless, you avoid delays or errors in receiving your W-2 caused by mailing.

Simply log-in to ADP W-2 services through the Penn Portal using your PennKey and password and click on “Paperless Options” on the “Myself” tab and check the “Access my W-2s and 1099s online only” box, then follow the remaining instructions to go paperless. You will also need to enter/update your e-mail address under “My Profile” on the “Myself” tab to ensure you receive notification when your W-2 is available.

You have until December 31, 2014 to select this option for your 2014 W-2.

Additional services offered through ADP include:
- Ability to upload payroll tax information directly into tax software such as TurboTax
- Access to your W-2 much earlier than mailing
- Ability to access your information from anywhere via a secure location
- Online Help and FAQ
- Access to W-2 forms 24 hours per day, 7 days a week for both Active and Terminated individuals
- No possibility of lost, stolen, or misplaced forms by Employee or USPS
- Low risk of identity thief from mailing of personal information
- Ability to print as many as desired

As a reminder, W-2 forms for tax year 2012 and prior will remain on the U@Penn portal under “My Tax Info”:
http://www.upenn.edu/u@penn
Tax forms from 2013 and later are or will be available on the ADP site.

For further information on this ADP W-2 services please go to:

**Validate Address for W-2 Forms**

Hundreds of W-2 forms are not received by individuals each year due to bad or incorrect mailing addresses. The most common errors are due to the following:
- The address is not a US Postal Service recognized address
- Apartment number is missing
- Street, City, or State is misspelled
- City doesn’t match the Zip Code
- Moved and address wasn’t updated in PennWorks

The Tax Office asks that you visit the U@Penn site at http://www.upenn.edu. Click on ‘Faculty & Staff’. Under ‘My Personal Data’, click ‘My Profile’. There will be a prompt to enter your PennKey and password. Once entered, your Home Address and Permanent Address will appear. W-2 forms are mailed to the Permanent Address. However, please review both addresses and correct if needed. If unable to access a computer, please consult with your Business Administrator at your School or Center to validate and/or update your address.

The Bottom Line  December 2014
TAX AREA NEWS:

TREATY EXEMPTIONS

Treaty exemptions are granted on a calendar year basis and therefore must be renewed each January. Please advise all monthly paid individuals who believe they are entitled to an exemption from Federal taxes to report to the Tax Office. These individuals must bring proper identification to confirm their eligibility and sign the appropriate Tax Treaty documents for the 2015 tax year. They should also bring their most current immigration document with them. Please note that we are unable to provide treaty benefits to weekly paid individuals.

In order to meet the deadline for the January 2015 payroll, employees must visit the Tax Office, 3451 Walnut St, Room 308, by Wednesday January 21, 2015.

If they do not meet the January deadline they may still apply for the exemption, however the treaty benefits will not take effect until February. Please note that Payroll will not refund the Federal Witholding Tax for individuals who missed the January 2015 deadline. The individual can claim the exemption when filing their 2015 tax return.

Please call the Tax Office at 898-6291 or email tax@exchange.upenn.edu with any questions or concerns.

TAX CHANGES 2015

- Social Security wage base will be increased to $118,500. The tax limit will be $7347.00.
- Medicare tax will remain the same rate at 1.45%. Wages paid in excess of $200,000 will be subject to an extra 0.9% which will be withheld from employees' wages.
- Retirement contribution limit will increase to $18,000.00 up to the age of 49.
- Catch-up contribution limit will increase to $6,000.00 for age 50 and over. The total contribution limit will be $24,000.00

NEW PROCEDURE FOR J-1 SCHOLAR LATE ARRIVAL

In order to streamline our services for newly arriving J-1 Scholars at Penn and ensure Penn's compliance with federal regulations, ISSS has implemented a new procedure for J-1 Scholars who need to change their program start date.

In the event that a J-1 Scholar cannot complete check-in at ISSS within 14 days of their program start date, their host department will be required to log into iPenn to complete a "J-1 Scholar Late Arrival" form. This form will streamline the collection of required information for this circumstance, and help ISSS to ensure that the appropriate updates are made in SEVIS.

We appreciate your cooperation with this new procedure. Please feel free to contact ISSS in case of any question.

http://global.upenn.edu/iss
### Weekly Closing Schedule

<table>
<thead>
<tr>
<th>Pay Period</th>
<th>Weekly Pay Date</th>
<th>Supporting Documents for New Appts must Reach HR Records by 5 PM</th>
<th>Additional Pay must be Submitted by 5 PM</th>
<th>Time Reporting by 3 PM</th>
<th>Database Changes to Existing Records before 5 PM</th>
</tr>
</thead>
<tbody>
<tr>
<td>24-Nov-30-Nov</td>
<td>05-Dec</td>
<td>24-Nov</td>
<td>28-Nov</td>
<td>01-Dec</td>
<td>01-Dec</td>
</tr>
<tr>
<td>01-Dec-07-Dec</td>
<td>12-Dec</td>
<td>01-Dec</td>
<td>05-Dec</td>
<td>08-Dec</td>
<td>08-Dec</td>
</tr>
<tr>
<td>08-Dec-14-Dec</td>
<td>19-Dec</td>
<td>03-Dec</td>
<td>9-Dec</td>
<td>10-Dec</td>
<td>10-Dec</td>
</tr>
<tr>
<td>15-Dec-21-Dec</td>
<td>22-Dec</td>
<td>05-Dec</td>
<td>11-Dec</td>
<td>12-Dec</td>
<td>12-Dec</td>
</tr>
<tr>
<td>22-Dec-28-Dec</td>
<td>02-Jan</td>
<td>22-Dec</td>
<td>26-Dec</td>
<td>29-Dec</td>
<td>29-Dec</td>
</tr>
</tbody>
</table>

**First Weekly Payroll for 2015**

Please note that the 01/02/2015 payroll will run on Monday 12/29/14. All time must be entered in the payroll system by Monday 12/29/14 at 3:00 p.m.

### Monthly Closing Schedule

<table>
<thead>
<tr>
<th>Pay Period</th>
<th>Monthly Pay Date</th>
<th>Supporting Documents for New Appts must Reach HR Records by 5 PM</th>
<th>Additional Pay must be Submitted by 5 PM</th>
<th>Time Reporting by 4 PM</th>
<th>Database Changes to Existing Records before 5 PM</th>
</tr>
</thead>
<tbody>
<tr>
<td>01-Dec-31-Dec</td>
<td>22-Dec</td>
<td>10-Dec</td>
<td>12-Dec</td>
<td>15-Dec</td>
<td>16-Dec</td>
</tr>
</tbody>
</table>

http://www.finance.upenn.edu/comptroller/accounting/closingsch/payroll/
Payroll 2014 Year End Dates

Off Cycle Payments (OCP)
- The last payroll for 2014 will be run on 12/16/14.
- As we all prepare to leave for winter break we will strive to process all payment requests within a 2 - 3 day window.
- We will continue to accept payment requests through 5:00 p.m. on 12/18/14.
- If an individual has direct deposit, the off cycle payment will be deposited to that account. Otherwise, the payments will go to the existing individual’s Total Pay Card account or a new Total Paycard account will be established if necessary.

Overpayments
- All overpayments must be communicated to the Payroll office by 12/18/14 and must be paid in full by January 2, 2015.
- Checks for the full amount should be made payable to the Trustees of the University of Pennsylvania.
- Overpayments reported to the Payroll Office after the deadline of 12/18/14 will be considered “prior year” overpayments and will have further tax implications to the employee.

Address Changes
- Deadline is 1/02/15. We ask that employee’s change their own address by logging onto the U@Penn website at www.upenn.edu/u@penn and click on the My Profile link in the Personal Resources, Health and Welfare section in the left hand column.
- Alternatively, your employees may contact their Business Administrator and request that the BA make the appropriate address change in the payroll system.
- W-2 forms are sent to the permanent address listed in the Payroll system. If not available, the current address is used.

PAYROLL & TAX OFFICE HOURS FOR WINTER BREAK
The Payroll and Tax Office will be staffed over the Winter Break to take phone calls and respond to e-mails only as follows:

<table>
<thead>
<tr>
<th>Day</th>
<th>Date</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thurs</td>
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</tr>
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</tr>
<tr>
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<td>Closed</td>
</tr>
</tbody>
</table>

Please note: No window hours.

FROM THE DESK OF THE CASHIER...

Effective as of Friday, November 14, 2014 Wells Fargo Bank will no longer accept U. S dollar (USD) checks submitted for deposit on foreign banks. This change impacts only USD checks submitted for deposit on banks in countries other than Canada and the United Kingdom and does not affect checks drawn in other currencies.
We rarely get USD checks from places other than Canada. If you receive a check and USD is next to the dollar amount, make sure it is from Canada or the United Kingdom. If not, your client will have to use another form of payment.
**Accounts Payable 2014 Year End Dates**

The following are the year-end processing cut-off dates for the AP Office. In order to ensure requests are processed before the end of the year, we are requesting you submit all requests by the dates listed below.

Requests submitted after these dates may still be processed before the end of the year, however, due to the increased volume of requests we receive during this time we cannot guarantee they will be processed. The dates are as follows:

**Wednesday, December 10, 2014 at 5:00 p.m. to be processed before December 31, 2014:**
- PDA Forms
- Request Final Closing of PO’s
- Requests to correct and reverse receipts

**Tuesday, December 16, 2014 5:00 p.m. to be processed before December 31, 2014**
- Purchase Order invoices

**Wednesday, December 17, 2014 at 5:00 p.m. to be processed before December 24, 2013:**
- Will Calls

**Wednesday, January 7, 2015 at 5:00 p.m. - Deadline to submit 1099 manual spreadsheet and W9's to AP for payments made outside of BEN Financials for 2014:**
- Print spreadsheet and attach W-9’s (only for participants who received payments for >600) and send to Accounts Payable.
- Email spreadsheet to joycers@upenn.edu

**AP Coverage for Winter Break**

The AP office will be staffed over the Winter Break to take phone calls and respond to emails only as follows:

<table>
<thead>
<tr>
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</tr>
<tr>
<td>Fri.</td>
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</tr>
</tbody>
</table>

*Please note: There will be no AP window hours.*

*If you have an emergency you may call the Helpdesk (215-898-2626) or e-mail APSUP@exchange.upenn.edu during office hours.

**Accounts Payable (AP) Helpful Hints/Tips**

- AP is no longer accepting C-1 Travel Forms. Non-Affiliate travel should now be submitted via PDA-NA form along with the GTR Worksheet.
- PO Invoices should be sent directly to AP. Vendors should not be sending invoices directly to the department.
- AP recently started accepting PO invoices via email, pending AP approval. If you are interested in having your Vendor email invoices, please contact our helpdesk at apsup@exchange.upenn.edu for further information. Please note: Vendors can not send invoices to our helpdesk email address; there is a separate process for this.
- Honorariums should not be paid to Employees.
- Please ensure that all Employee related payment requests are submitted on a PDA-Employee/Student form.
- When submitting several PDA forms for a new vendor, please attach a W9 to each form. This will be helpful in ensuring that the forms without the W9 do not get rejected.
- PDA forms should not have double sided invoices attached, please copy to one page.
- US Citizens with a foreign address should be submitted on PDA-Foreign form. Please reference on the PDA-F that they are a US Citizen.
### December 2014 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 12:**
    - Last date to deliver to Gifts Accounting & Administration December 2014 – FY15 gifts (need December 31 postmark) IRS rules require that year-end gifts be postmarked on or before December 31, 2014
    - Last date to submit adjustments for year-end processing
  - **January 13, 14, 15:** Gifts Office will close for year-end processing
    - Should you receive a $100,000+ check in January, we will deposit and process during this time period

- **January 16:** Gifts Office will reopen for deliveries
- **January 20:** Begin preliminary reporting

 Notify Jean Suta in Securities Gifts Office (jeanie@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.

 Should you have any questions on this information, contact Cassie Bartelme (8-3104), Maria Perkins (8-8687) or Jean Suta (87254) in the Treasurer’s Office.

### Gifts Accounting & Administration and Records Winter Break Schedule

<table>
<thead>
<tr>
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<td>Closed</td>
</tr>
<tr>
<td>Fri</td>
<td>01/02/15</td>
<td>Closed*</td>
</tr>
</tbody>
</table>

**Closed due to special University Holiday schedule**

[http://www.upenn.edu/almanac/volumes/v60/n34/recognizedholidays.html](http://www.upenn.edu/almanac/volumes/v60/n34/recognizedholidays.html)

### University Cashier Office Winter Break Schedule

<table>
<thead>
<tr>
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</tr>
</thead>
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<td>Closed*</td>
</tr>
</tbody>
</table>

*Closed due to special University Holiday schedule*
NEW CONCUR LOOK COMING IN JANUARY 2015

Continued from page 1

NO REQUIRED TRAINING
After a review of the new interface, it was determined that existing Concur users will not be required to complete any transition training. Existing training materials on Knowledge Link will be updated prior to rollout of the new interface (Concur Expense Approver Knowledge Building and Concur Expense Approver Application Training). Users may retake training optionally. Numerous demo sessions will be held across campus starting in early January to introduce users, delegates, and approvers to the new interface. See the Project website for updates at:

https://cms.business-services.upenn.edu/penetravel/training-manuals/newui.html

NO CHANGE TO SYSTEM ACCESS
Access to Concur will remain the same as before at:

https://medley.isc-seo.upenn.edu/authentication/profile/concur?app=concurprod

You will need your PennKey and Password to log in.

END-USER SUPPORT
There will be no changes to end-user support. You may continue to use the current process for questions or assistance:

- Central support is available at 6-HELP, 215-746-4357. Select Option 3 for Concur, then 1 for Travel or 2 for Expense.
- To submit a help request via e-mail, contact temsupp@exchange.upenn.edu.

REFERENCE MATERIALS AND NEW INTERFACE DEMO SESSIONS
Updated reference materials, including Concur instructional guides, how-to videos, and Travel and Expense FAQs, will be available when the new interface is launched on January 20th. “Noted Differences” documents, which highlight the key new features and changes, will be made available prior to the changeover. In addition, numerous demo sessions will be held across campus starting in early January to introduce users, delegates, and approvers to the new interface.

For more information on the new interface, or to preview updated reference materials, see the Project website at:

https://cms.business-services.upenn.edu/penetravel/training-manuals/newui.html

QUESTIONS
More information about the Concur interface redesign will be provided via School/Center representatives to users in their organizations. If you have any questions, comments, or suggestions, please send an e-mail to:

temsupp@exchange.upenn.edu

For general information on Concur, please visit the Penn TEM web site at:

http://cms.business-services.upenn.edu/penetravel/

ESHIP@PENN
The University will be introducing eShip@Penn™, a new and enhanced express shipping process, in the coming months. While the primary goal of the new system is to minimize the University’s risk associated with moving hazardous or other regulated materials and to ensure compliance with safety and other mandates, the online system also offers benefits to all University shippers.

The eShip Project Team, together with eShip Advisory Group, comprised of School and Center representatives, is currently working on developing a training and rollout schedule. Questions about this project can be addressed to the project team at: eShip@exchange.upenn.edu. Additional details will be available on the Penn Mail website, after Dec. 5.
Frequency Programs: Airlines, Hotels and Rental Car Agencies

Multiple requests have come in to Travel Services for links to the various frequency programs available for travel. Please distribute this to your travelers.

<table>
<thead>
<tr>
<th>Traveler Benefit</th>
<th>Sign Up Directions</th>
<th>How do I gather points?</th>
</tr>
</thead>
</table>
| - The Traveler will accumulate point to use towards free rentals, upgrades, priority boarding and other bonuses at no cost to the University | - Click on any of the links below, and follow the sign up instructions | - If you book your travel through Concur or World Travel, your frequency number will automatically be put on appropriate reservations if you have loaded the frequency program in your Concur Profile. You do nothing extra.  
- If you book using another means, including hotels through conference registration, give them your frequency number when you check in at the hotel, airport or rental car agency. |

Links

<table>
<thead>
<tr>
<th>Airlines</th>
<th>American AAdvantage: <a href="#">Click Here</a></th>
<th>United Airlines Mileage Plus: <a href="#">Click Here</a></th>
<th>US Airways Dividend Miles: <a href="#">Click Here</a></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Delta Airlines SkyMiles: <a href="#">Click Here</a></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Southwest Rapid Rewards: <a href="#">Click Here</a></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Rental Cars</th>
<th>Enterprise Plus: <a href="#">Click Here</a></th>
<th>Avis Preferred: <a href="#">Click Here</a></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>National Emerald Club: <a href="#">Click Here</a></td>
<td>Budget Fastbreak: <a href="#">Click Here</a></td>
</tr>
</tbody>
</table>

| Hotels |  
|--------|-------------------------------------------------|
| - Club Quarters Gold Rewards: [Click Here](#) |  
| - Starwood Preferred Program: [Click Here](#) |  
| Brands – Sheraton, Westin, Four Points, Aloft, St Regis and W Hotels . Our SET # is 4309. |  
| - Choice Hotels Privileges: [Click Here](#) |  
| Brands - Comfort Inn & Suites, Clarion, Quality, Cambria, MainStay, Suburban, Rodeway, Ascend. |  
| - IHG Rewards Club: [Click Here](#) |  
| Brands - Crowne Plaza, Holiday Inn, Staybridge Suites, Hotel Indigo, Candlewood Suites |  
| - Club Carlson: [Click Here](#) |  
| Brands – Radisson |  
| - Marriott Rewards: [Click Here](#) |  
| - Hilton Honors: [Click Here](#) |  
| Brands – Hilton, DoubleTree, Embassy Suites, Hampton, Homewood Suites, Home2, Conrad, and Waldorf Astoria |  
| - Hyatt Gold Passport: [Click Here](#) |  
| - Best Western Rewards: [Click Here](#) |  
| - Wyndham Rewards: [Click Here](#) |  

Share the information below with others who would benefit from receiving these news and notes.

To join the listserv for News and Notes on Concur Travel and Expense  
Email: listserv@lists.upenn.edu  
Leave subject line empty  
Enter in the body of the email: Join Concurinfo

The Bottom Line  
December 2014
**Penn I CARE**

**FACULTY and STAFF TRAINING**

BECOME A PART OF THE PENN I CARE NETWORK OF CERTIFIED TRAINED RESPONDERS!

I CARE Training
An intensive 7-hour training designed to teach the signs of distress and mental health crisis that can affect college students. Experienced CAPS clinicians will teach their Penn colleagues “I CARE” skills which are essential for suicide prevention and supportive intervention.

**FACULTY / STAFF ARE ASKED TO COMMIT TO THE ENTIRE TRAINING**

---

**Penn I CARE Training Day Schedule**

- Introductions
- Overview of college mental health including national trends, developmental issues, stigma and barriers for students accessing resources
- Tips for identifying and understanding stress, distress, risk factors and common psychological problems of college students
- Insight into cultural considerations in mental health
- Guide to assessing mental health crisis and suicidal ideation
- First-person accounts from college students about their experiences with mental health crisis
- Lunch break – food will be provided
- Develop I CARE skills – learn effective listening and intervention skills
- Practice I CARE skills – role play simulations
- Develop health self-care
- Learn about Penn mental health resources

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**Friday, December 5, 2014 – Location TBD – 9:00am - 4:00pm**

**Monday, January 12, 2015 – Glandt Forum – 9:00am – 4:00pm**

To register go to: www.upenn.edu/caps/

**The Bottom Line** December 2014
As a participant in the University of Pennsylvania Health Care Flexible Spending account who uses the ADP Health Spending Account Card, you’re probably accustomed to receiving email notifications requesting receipts or advising that a purchase has been approved. Although these notifications have always originated from ADP’s contracted card partner, the sender email address (fsa_webcare@adp.com) appeared as if the notice was coming directly from ADP. Due to recent email protocol changes, your card notifications will now reflect ADP’s card partner as the email sender.

Effective October 1, 2014, all of your card notifications will reflect a sender email address of adp_fsa@alegeus.com. It may be necessary for individual users to add this email address to their individual list of trusted senders to ensure that it is not blocked as spam. If necessary, contact your local support provider (LSP) for information on how to configure your email account to ensure the messages are delivered properly.

It is important to note that this is simply a change of origin email address. ADP’s card partner has already been providing your card notices and has access to the information needed to process and produce these notifications. All HIPAA requirements are met under ADP’s contract with our card partner.

If you have any additional questions, please contact the Penn Benefits Center at 1-888-736-6236. Representatives are available to assist you Monday – Friday, 8:00 a.m. – 8:00 p.m., Eastern Time, excluding holidays.

We appreciate the opportunity to assist you!

DISCLAIMERS

ADP does not engage in rendering legal services and any guidance given in this communication is not legal advice. Any discussion of issues is merely guidance that, at your discretion, you may or may not use in making decisions. If legal advice is desired or required, the services of legal counsel are recommended.

This communication is intended solely for the use of the individual to whom it is addressed and may contain information that is privileged, confidential or otherwise exempt from disclosure. If the reader of this communication is not the intended recipient or the employee or agent responsible for delivering the message to the intended recipient, you are hereby notified that any dissemination, distribution or copying of this communication is strictly prohibited. If you have received this communication in error, please immediately notify ADP.
On May 12, 2014, the new BEN Billing and Receivables modules went live in BEN Financials. The new modules (Grants/Projects and Accounts Receivable) will only be used by staff in the Office of Research Services and the Office of Research Support Services involved in sponsored projects billing, receivables, and collections-related operations. BEN Billing and Receivables links PennERA with BEN Financials, and replaces Penn’s Billing and Receivables Information Management (BRIM) system.

Below please find the link to the Ben Financials Documentation page. Information concerning to the BEN Billings and Receivables System has been added which may answer questions related to Sponsored Projects Revenue, Indirect Costs, Receivables and Cash Receipts.

- [http://www.finance.upenn.edu/ben/benfin/documentation/](http://www.finance.upenn.edu/ben/benfin/documentation/)

...To gain access to Supplier/Shipment information in BEN Buys, you can take the on-line training course in Knowledge Link titled BEN Buys – Invoice Inquiry. To register for this course, go to: [http://knowledgelink.upenn.edu/](http://knowledgelink.upenn.edu/)

Did You Know…

The Winner will receive a gift certificate for two for the University Club!

1. If I don’t want to wait for your BEN report to print at the end of the month, what is an option for you?
2. What is the new phone number and e-mail address for ISC’s Client Care?
3. What is the last day a Purchase Order invoice should be received to ensure it is processed before December 31st?
4. In order to see Supplier/Shipment information in BEN Buys, what on-line training can I take?
5. What is the last day that you can elect not to have your W-2 printed and mailed to you?

Last Quarter’s Winner:

Congratulations!
Donna Adams
Office Manager
University of Pennsylvania
Environmental Health and Radiation Safety
THE FOLLOWING ARE SOME REMINDERS OF ISSUES COMMONLY SEEN IN PROPOSALS WHICH MAY RESULT IN SUBMISSION ERRORS:

**Deadline Dates:**
- Some agencies will include a default deadline date in their funding opportunities. This information is provided to Grants.gov by the funding agency and will auto-populate in the PennERA proposal record. For example, NIH opportunities automatically return the next “NEW” deadline date for a given opportunity. *This information may not be correct.* Revised/Amended applications and some deadline-specific opportunities will have different deadline dates.
- **Always check the auto-populated deadline and revise accordingly.**

**Investigator Sponsor Credentials**
- Some sponsors (NIH, NSF, and DOD-CDMRP for example) require that a PI’s, sponsor-specific, “Sponsor Credential ID” information be included in proposal submissions. If this information is not included, the proposal may fail upon Agency retrieval, or, in the case of NSF submissions, the PI will not be able to view the proposal record once it is inserted into the Fastlane system.
- Sponsor Credential information is added in the PennERA Profile. Instructions on updating Credential information can be found in the PennERA Users Guide, page 23. Once added to the Profile, it will automatically populate all future applications.
- Questions about obtaining sponsor-specific credentials should be directed to your ORS Preaward contact.

**Other Attachments and Appendix Names:**
- Provide a clear descriptive name for uploads to both Other Attachments and Appendix sections. Some opportunities have specific requirements for both the naming convention and type of uploads allowed.
- If Appendix items are referenced by specific names in the research description (e.g., “Appendix A” or “Survey Questionnaire”), use those names for the uploads, so that application reviewers at the federal agency can easily locate specific appendix documents.

**NIH *Revision S2S Submissions* (**Request for Supplemental Funding):**
- Proposed start date must be later than today’s date.
- Proposal title must be the same as the project title on the Parent (currently awarded) grant, including punctuation and spaces.
- No Cover Letter upload is allowed (Type 3, 6, and 7 applications).

**K Submissions and Citizenship Status:**
- Confirm that the correct status is selected on the K Awards Documents tab. PD will default to Permanent Resident.

**NIH NRSA Fellowship (Type F):**
- A new “Additional Educational Information” attachment is now required in F31 and F32 applications as part of “Other Attachments.” This is described in the new parent NIH Fellowship Funding Opportunity Announcements (FOAs) that were released in March.
- The instructions vary between the F31 and the F32 (See SF424 (R&R) Other Project Information Component):
  - **Parent F32 (Postdoctoral Fellowships)**
    - [http://grants.nih.gov/grants/guide/pa-files/PA-14-149.html#_Section_IV._Application](http://grants.nih.gov/grants/guide/pa-files/PA-14-149.html#_Section_IV._Application)
  - **Parent F31 (Predoctoral Fellowships)**

See also:
- NIH FAQs on the new requirement
  - [https://grants.nih.gov/training/faq_fellowships.htm#395](https://grants.nih.gov/training/faq_fellowships.htm#395)
- **Reminder in the NIH Extramural Nexus**
  - [http://1.usa.gov/1Jiode](http://1.usa.gov/1Jiode)
Please see notice below from NSF regarding the release of new proposal and award policies procedures. If you have any questions please feel free to contact our office.

Dear Colleagues,

We are pleased to announce that a revised version of the Proposal & Award Policies & Procedures Guide (PAPPG), (NSF 15-1) has been issued. The PAPPG has been revised to implement 2 CFR § 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance). The Uniform Guidance incorporates language from eight existing Office of Management and Budget (OMB) circulars into one consolidated set of guidance in the Code of Federal Regulations. The PAPPG also has been revised to incorporate other significant changes and clarifications unrelated to the Uniform Guidance implementation.

The PAPPG is comprised of documents relating to the Foundation's proposal and award process and consists of the:

(a) Grant Proposal Guide (GPG) for guidance on the preparation and submission of proposals to NSF; and

(b) Award & Administration Guide (AAG) to guide, manage, and monitor the award and administration of grants and cooperative agreements made by the Foundation.

As mandated by OMB, the new PAPPG will be effective December 26, 2014. In addition to the significant changes to implement the Uniform Guidance, other important revisions include:

- Acknowledgement of the implementation of NSF’s new financial system (iTRAK);
- Addition of an NSF electronic capabilities modernization status matrix to assist the community as NSF transitions our electronic capabilities to Research.gov;
- Additional compliance checking regarding the type of proposal mechanism used;
- Expansion of the budget justification section to reflect that each subaward must include a separate budget justification of no more than three pages;
- New coverage on the Ideas Lab funding mechanism;
- Description of new prior approval requirements; and
- Numerous clarifications throughout the document.

Given the extensive nature of the changes made to implement the Uniform Guidance and other important revisions, the community is strongly encouraged to review the by-chapter summary of the changes provided in the Introduction section of the PAPPG. A webinar to brief the community on the new PAPPG will be held in early January; further communication will be forthcoming.

While this version of the PAPPG becomes effective on December 26, 2014, in the interim, the guidelines contained in the current PAPPG (NSF 14-1) continue to apply. We will ensure that the current version of the PAPPG remains on the NSF website, with a notation to proposers that specifies when the new PAPPG (including a link to the new Guide) will become effective.

Please direct any questions to the Policy Office in the Division of Institution & Award Support at policy@nsf.gov, or (703) 292-8243.

Regards,
Jean Feldman
Head, Policy Office
Division of Institution and Award Support
Office of Budget, Finance & Award Management

The Bottom Line

December 2014
Information Systems & Computing’s new Client Care, a single point of contact for requesting support and ordering services, has been well received by clients. ISC Client Care features a new website, new contact information, new business hours, and a new location. Here are some of the positive comments received since our October 6th launch date:

- Issues are being responded to quickly, and clients appreciate knowing the names of IT staff who handle their tickets
- Courtesy follow-up calls after ticket resolution are welcomed—clients enjoy reviewing their ticket status with an ISC Client Care representative
- The new website is easy to use and understand
- The new chat service is enthusiastically embraced as a noteworthy contact method

Here’s How to Contact ISC Client Care

It’s now easier to request support and order services—use one website, one email address, or one phone number. Please bookmark the new URL (www.upenn.edu/isc/help/) and add the new email address and phone number to your contact directory.

- Website: www.upenn.edu/isc/help: A new, mobile-ready website features information, tools, and resources for requesting support and ordering services in one place, such as self-service forms for some of ISC’s most widely used services and how-to documents for frequently requested information. A chat service enables immediate access and real-time answers from ISC Client Care representatives.
- Email: help@isc.upenn.edu: Email is answered Monday to Friday, 8 AM to 6 PM.

- Phone: 215-898-1000: Calls are answered by ISC Client Care representatives Monday to Friday, 8 AM to 6 PM. After business hours, a streamlined automated menu system will help speed up the calling process.
- New hours and location: Monday to Friday, 8 AM to 6 PM, Sansom Place West, Second floor, Suite 202: The location includes a consultation room for walk-in or appointment-based consultations.
- After hours: Requests received after 6 PM Monday to Friday and on weekends and holidays will be processed at the start of the next business day. For emergencies during non-business hours, please telephone ISC Client Care at 215-898-1000 for instructions on how to reach on-call ISC staff.

We Want to Hear from You!

In addition to ongoing surveys, ISC Client Care includes an evaluation period through January 2015. Please take a moment to provide feedback when asked—your opinion is essential to refining our processes.

We also encourage you to visit the ISC Client Care website at www.upenn.edu/isc/help on both your desktop and mobile devices and to send comments about the service and the website to help@isc.upenn.edu. If referring to a specific webpage, please provide the URL.

More Information

For more information about ISC Client Care, contact project managers Dawn Augustino at dawn@isc.upenn.edu and Amy Phillips amyp@isc.upenn.edu. To keep current about ISC’s new organization, visit Redefining ISC at www.upenn.edu/computing/isc/redefine.
Chat Us Up! Talk Live with an ISC Client Care Representative

ISC Client Care Features a New Chat Service

Information Systems & Computing has a new way that you can request ISC services and support. You can now chat with and receive assistance in real-time from an ISC Client Care representative directly from the ISC Client Care website at www.upenn.edu/isc/help. Chat is available Monday to Friday, 8 AM to 6 PM.

To access chat, click the “Chat with Us” icon on the ISC Client Care homepage or click “Contact Us” on the toolbar and select “Chat with Us” from the pull-down menu. When the Chat window displays, you will need to complete the required information, which will assist us in resolving your issue. Next, click the Submit button to talk live with a representative from ISC Client Care. At the conclusion of your chat session, you can request a transcript to be emailed to you by clicking the email icon located in the upper-right corner of the chat window. If you do not receive the transcript within 5 minutes of submitting your request, check your spam/junk folder in case the message was filtered.

After normal business hours, please send an email to help@isc.upenn.edu. You will receive an automated email acknowledging your request and an ISC Client Care representative will contact you the next business day.

Self-Service Forms at ISC Client Care

Order ISC’s Most Requested Services in One Place

Forms for ordering Information System & Computing’s most requested services are now available in one central location at ISC Client Care. To access the forms, go to www.upenn.edu/isc/help and click on the Self-Service Forms icon or enter “forms” in the Search textbox and click on the following link in the Search results: Self-service forms Penn ISC Client Care - University of Pennsylvania.

On the Self-Service forms page, click on the tab for the type of form you want to access, and, if prompted, enter your PennKey and password to complete the form. Currently, the tabs and associated forms are:

- Data & Voice: Add, remove, and audit telephone and voice mail services; submit and manage voice and data orders in the OMS (Order Management System)
- Mailing Lists: Create and deactivate mailing lists
- PennKey: Register, test, and reset PennKeys and Pennkey passwords
- Desktop Computing & Support: Create and check the status of Remedy tickets
- Web: Add, modify, and delete third-level domain names

As mentioned in prior communications, ISC Client Care will include an evaluation period through January 2015 to gather feedback and fine tune processes. It is anticipated that additional forms will be added after the evaluation.

The Bottom Line December 2014
How to Schedule a Report?

Tired of waiting for your report to run at the end of the month? Try this! You can define your schedule to run a request as soon as possible, at a specific time, repeatedly at specific intervals, or on specific days of the week/month.

- Click on Reporting > Run Report to open the ‘Submit a New Request’ window
- Click OK to open the ‘Submit Review’ window
- In the Name field enter the report or select the report from the list of values
- Enter the ‘Parameters’ and click OK to return to the ‘Submit Request’ window
- Click [Schedule] to view your scheduling options

Select from the following:

1. **As soon as possible** - Submits your request as soon as possible
2. **Once** - Submits your request once at the time and date you specify
3. **Periodically** - Submits your request repeatedly on specific days of the week or month
4. **On Specific Days** - Submits your request repeatedly on specific days of the week or month

   - Place a check in the ‘Save this schedule’ box to save your schedule
   - Provide a unique name for each schedule you save
   - Enter a description of your schedule
   - Click OK to return to the ‘Submit Request’ window
   - Click [Submit] to save your request and return to the ‘Requests’ window

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**For a Non-Marketplace Requisition, when Do I Use “Goods Billed by Quantity” and “Goods or Services Billed by Amount”?**

It is important to select the appropriate ‘Item Type’ when creating a ‘Non-Marketplace’ requisition. Below are examples of when to use ‘Goods Billed by Quantity’ and ‘Goods or Services Billed by Amount’.

- Select the Item Type ‘Goods billed by quantity’ when you ordering items that will be billed by the Supplier using the ‘quantity’, i.e. 5 of something, 10 of something, etc.

![Diagram of 'Goods billed by quantity'](image)

- Select the Item Type ‘Goods or services billed by amount’ when you are ordering something that will be billed by the Supplier using the ‘amount’, i.e. $500, $1,000, etc.

![Diagram of 'Goods or services billed by amount'](image)

For more information, go to the Financial Training Department website, Documentation page, and click on the Requisitioner User Guide.

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**The Bottom Line**

December 2014