The Human Capital Management (HCM) Transformation Initiative is in full swing. This University-wide effort will simplify human capital-related processes and implement a modern system powered by Workday. Engagement with Schools and Centers is core to HCM, and we want you to stay informed and engaged throughout the project.

Whether you’re directly involved or just like to be in the know, stay current on all things HCM with the HCM Update. The monthly e-newsletter brings you reports from the Workday and Service Delivery teams, resources to help prepare for change, information about upcoming events, and more. Sign up to have the HCM Update delivered straight to your email inbox. It’s also online at www.hr.upenn.edu/hcm/news. Login may be required for some content online.

Visit the HCM website for in-depth information and answers to your questions. Why is Penn doing HCM? Who’s involved? What’s the timeline for implementation? You’ll find all that and more online. The HCM team welcomes your questions and comments. Do not hesitate to contact us at hcm-announcement@upenn.edu

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Paperless W-2s

Did you know that individuals can elect not to have their W-2 printed and mailed to them? ADP, our W-2 provider, offers individuals the option to suppress the printing of your W-2 and allows you to securely view and print your W-2 from your personal computer. By going paperless, you avoid identity theft and mail delays!

Follow these instructions to log-in to ADP W-2 services:

- Click on ‘My Tax Info’ in the ‘My Pay’ section at U@Penn.
- Login with your PennKey and Password.
- Enter your birthdate and last four digits of your SSN and click ‘Continue’.
- Click ‘Continue’ on the next screen.
- Click on the link that says ‘Click here for W-2 information for tax years 2013 and later’. This will take you to the ADP site.
- The first page will be the ADP Dashboard.
- Hover over your name in the upper right hand corner and select ‘Settings’.
- Under ‘Contact Preferences’, make sure your email address is correct in the box. If not, click ‘Edit’ to add or update.
- Next under ‘Go Paperless’, click the slider to agree to ‘Receive paperless statements’ and to be ‘Notified by Email’. This will open a new window, where you must check the box to ‘Receive Paperless Annual Tax Statements’ and click on ‘I agree’.

Remember to close ALL browser windows when you have finished making your updates to protect your personal information.

You have until December 31, 2017 to select this option for your 2017 W-2. Once you opt out of having your W-2 mailed, you will continue to receive them electronically each year until you elect to receive a paper W-2 once more.

As a reminder, W2 forms for tax year 2012 and prior will remain on the U@Penn portal under “My Tax Info”. Tax forms for the current and prior two years are available on the ADP site.

W-2 Address

W-2 forms are mailed to the address on file within the PennWorks/Personnel/Payroll System. If you have moved or need to update your address, please visit the U@Penn website. Under ‘My Personal Data’, click ‘My Profile’ to change your address or follow the instructions in the adjacent article to opt out of receiving a paper W-2 form and receive your W-2 electronically.

Treaty Exemptions

Tax Treaty exemptions are granted on a calendar year basis for certain types of payments such as scholarship/fellowships and employment income. 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 their Penn ID to confirm their eligibility and sign the appropriate Tax Treaty documents for the 2018 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 2018 payroll, students and employees must visit the Tax Office, 3451 Walnut St, Room 310, by Wednesday, January 24, 2018. 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 Withholding Tax for individuals who missed the January 2018 deadline. The individual can claim the exemption when filing their 2018 tax return. Please call the Tax Office with any questions or concerns at 215-898-6291 or submit a HelpDesk inquiry at: https://www.finance.upenn.edu:44301/apps/TaxHelpDesk/
Payroll 2017 Year End Dates

Overpayments
- All overpayments must be communicated to the Payroll Office by 12/21/17 and must be paid in full by January 5, 2018.
- 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 12/21/17 will be considered “prior year” overpayments and will have further tax implications to the employee.

Off Cycle Payments
- Off cycle requests must be submitted to the payroll department by 5 p.m. on December 21, 2017.

Address Changes
- Deadline is 1/05/18. 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
The Payroll and Tax Office will be staffed over the Winter Break to take phone calls and respond to e-mails only as follows:

- Mon. 12/25/17 Closed
- Tues. 12/26/17 Closed
- Wed. 12/27/17 8:00 a.m. – 12:00 p.m.
- Thurs. 12/28/17 Closed
- Fri. 12/29/17 8:00 a.m. – 12:00 p.m.
- Mon. 01/01/18 Closed

Please note: No window hours.

January 2018 Payroll
- The payroll for week ending 12/24/17 will run on Tuesday December 26th at 3 p.m. with an issue date of 12/29/17.
- All time must be entered into the payroll system by Tuesday, 12/26/17 by 3 p.m.
- Weekly payrolls from pay period ending 12/31/17 through 1/14/18 will run on Tuesday’s at 3 p.m. due to end of year processing and the MLK Holiday. We will resume payroll processing on Monday’s starting 1/22/18.

http://www.finance.upenn.edu/comptroller/accounting/closingsch/payroll/

Procard Journals – Holiday Posting
- Journals imported into BEN on 12/15/17 post 12/22/17.
- Journals imported into BEN on 12/22/17 post on 1/5/18.
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 6, 2017 at 5:00 p.m. to be processed before December 31, 2017:**
- PDA Forms
- Request Final Closing of PO’s
- Requests to correct and reverse receipts

**Wednesday, December 13, 2017 5:00 p.m. to be processed before December 31, 2017**
- Purchase Order invoices

**Monday, December 18, 2017 at 5:00 p.m. to be processed before December 31, 2017:**
- Will Calls

**Friday, January 5, 2018 at 5:00 p.m. - Deadline to submit 1099 manual spreadsheet and W-9’s to AP for payments made outside of BEN Financials for 2017:**
- 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:

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<tr>
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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](mailto:APSUP@exchange.upenn.edu) during office hours.

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**How to Add/ Change Your Supervisor in Knowledge Link**

If you need to add or change the Supervisor in Knowledge Link follow these steps:

- From the Knowledge Link Home tab, type ‘Profiler’ in the ‘Find Learning’ search box
- Select the [Penn Profiler Training Assessment](#)
- Click on ‘Set Supervisor’
- Update/Enter the Supervisor
- Click on [Submit]
The IRS has made a change in its treatment of stipends paid to post-doctoral fellows and researchers using grants other than those authorized under the National Research Service Award (NRSA) program. Stipends paid to non-NRSA research fellows are now deemed to be “wages” for employment tax purposes and are subject to Federal income and FICA tax withholding effective January 1, 2018. These stipends will continue to be subject to State, Local and State unemployment tax.

Additionally, the Schools/Centers will be assessed a 9.7% EB rate on the funding source of the post-doc salary.

Post-doctoral fellows funded by NRSA grants will continue to be exempt from Federal income and FICA tax withholding.

**WHAT TO TELL POST-DOCTORAL RESEARCHERS AND FELLOWS**

**Non-NRSA Post-Doctoral Researchers and Fellows**

Beginning in January, 2018, the University will begin withholding Federal income and FICA taxes from their stipends. Post-docs should determine whether they need to complete or update their Federal Form W-4. Revised W-4 forms should be submitted to the Payroll Office, 310 Franklin Building, 3451 Walnut Street, Philadelphia, PA 19104.

As many of you are aware, a number of states and cities – including Philadelphia – have passed legislation that prohibits employers from asking for and/or considering an applicant’s salary history during the hiring process. Although Philadelphia’s ordinance has not yet taken effect due to a legal challenge, other cities and states in which Penn hires have passed similar laws that are now or will shortly become effective, including New York City and California.

The University of Pennsylvania has made a decision to remove all requests for candidates’ salary history from its employment application for all new job postings beginning Tuesday, November 21 or Wednesday, November 22. For jobs that are currently posted, the salary history request will remain visible and the applications will still contain salary history questions. All applications will continue to request candidates’ desired salary, and it is permissible to ask candidates about their preferred salary, even in jurisdictions that prohibit inquiries into candidates’ salary history.

We will continue to provide you with updates on the outcome of the legal challenge to the Philadelphia legislation and how it may affect salary history inquiries during the hiring process. At present, it is still acceptable to ask a candidate applying for a position in Philadelphia about his or her salary history and to consider salary history during the hiring process. However, in jurisdictions where salary history inquiry restrictions have taken effect or soon will, such questions are prohibited. These jurisdictions currently include New York City, Delaware (effective December 14, 2017), California (effective January 1, 2018), Massachusetts (effective July 1, 2018) and Oregon (effective January 1, 2019, and this list is likely to expand as other jurisdictions consider similar legislation.

This change does not affect:

- Post-doc employment status
- Post-doc benefits
- Funding mechanism of post-doc health insurance
- Processes for hiring, evaluating, and discontinuing post-docs

Nonresident aliens should contact Tax and International Operations at 310 Franklin Building, 3451 Walnut Street, Philadelphia, PA 19104, to determine eligibility for treaty benefits.

**NRSA post-doctoral fellows**

These individuals are not affected by the change and will experience no change in how their taxes are withheld or how they must file their annual tax return.

**WHAT YOU NEED TO DO**

You should notify all non-NRSA post-docs of the change to their tax withholding and that they should review and update their W-4, if necessary. A separate communication will be sent to the Senior Business Administrators with a listing of current non-NRSA post-docs.

Job Classes, Earnings Codes and Object codes may change as a result of this IRS ruling. We anticipate these changes can be systemically, without end-user intervention. We will send out a separate notice outlining these changes once these details have been finalized.
As we approach year-end, please be advised of the following closing guidelines for gifts.

**December 31 Gift Date end of year processing:**
- **January 8:**
  - Last date to deliver to Gifts Accounting & Administration December 2017 – FY18 gifts *(need December 31 postmark)* IRS rules require that year-end gifts be postmarked on or before December 31, 2017
  - Last date to submit adjustments for year-end processing
- **January 9, 10, 11:** 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 12:** Gifts Office will reopen for deliveries
- **Please Note:** Depending on volume, GAA may continue to process 12/31 activity
- **January 16:** Begin preliminary reporting

Notify Jean Suta in Security Gift 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 4 p.m. on December 29.

Should you have any questions on this information, please contact Kate Micklow Harwan (8-3104), Maria Perkins (8-8687) or Jean Suta (8-7254).

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

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### University Cashier Office Winter Break Schedule

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**Gifts to Employees**

As we approach the holiday season, Tax and International Operations would like to remind you that giving gift cards to faculty, staff, or students is against University policy. Under IRS regulations, gift cards provided by employers to employees are deemed to be wages and are subject to employment taxes without regard to their value.

Please refer the Comptroller’s web site to review the policy associated with the distributions of gifts to employees:

Policy #2326 Gifts Based on University/Employee Relationship.

If you have any additional questions, please contact Tax and International Operations at 898-6291 or submit a Help Desk inquiry at:

AN UPDATE ON THE ENHANCEMENTS TO THE PENN MARKETPLACE

In August 2017, a campus-wide effort to launch enhancements to the Penn Marketplace was jointly announced by Divisions of Business Services, Finance and Information Systems & Computing. The aim of these enhancements is to improve administrative efficiencies related to supplier onboarding, supplier self-service, electronic PO invoice processing, and the Non-PO Payment Request (current PDA) process.

Since the announcement of the initiative, the project’s Core Team has moved swiftly forward with designing new business processes while configuring the solution with Jaggear (formerly SciQuest), the technology provider that Penn selected and that currently powers the Penn Marketplace. To gain a broader perspective, 60 Change Agents who are practitioners and administrators in the schools and centers were engaged in a walkthrough in September 2017 to provide input on the initial configuration. Their feedback has been addressed, considered, and incorporated wherever possible to create the best possible solution for the University and its suppliers.

The Penn Purchasing Services Website (www.upenn.edu/purchasing) has added a new section called Marketplace Enhancements that is accessible via the “Quick Links” area. As the project’s Configuration Phase comes to a close and Validation and User Acceptance Testing moves to the forefront, visit Marketplace Enhancements regularly for news and announcements, frequently asked questions, and access to training resources for the user community.

Penn Marketplace Enhancements Project milestones include:
- July 2017 – Formal Implementation Kickoff
- August 2017 – Project Announcement
- September 2017 – Change Agent Walkthrough
- September 2017 – Project Website Launched
- Fall 2017 – End-to-End Walkthrough & Solution Validation Kickoff
- FY18 Third Quarter – Prepare Users & Launch Solution

Please contact the project team to offer feed-back or pose additional questions at: PennMarketplace@upenn.edu

Purchasing Services Announces New University Wine and Spirits Supplier

Purchasing Services is pleased to announce that effective immediately Specialized Wine and Spirits is the new preferred contract supplier for Wine and Spirits. Breakthru Beverage Group is no longer providing this service.

Their Ben Buys Supplier Number is 596358 and the ordering procedures remain similar to that of Breakthru Beverage Group and can be found by clicking here.

Please direct all questions regarding products and pricing to Specialized Wine & Spirits representative, Carl Zahn, at 732-915-5557.
ISC continues its move to more transparent, easy-to-understand IT bills using Apptio, ISC’s new “Bill of IT” service. With more than 50% of ISC invoices managed by Apptio, ISC is well on its way to managing all ISC bills with Apptio by the end of this fiscal year.

ISC’s Apptio provides clients:
- Automated bill notifications and consolidated access to ISC invoices
- Self-service invoice details, exportable to Microsoft Excel
- Fiscal year-to-date trends for IT charges and service consumption
- Dashboard summary of ISC invoices and trends to inform budgetary conversations

**How Do I Request Access to My ISC Bill in Apptio?**

To request access to your departments’ invoices, go to [https://www.isc.upenn.edu/apptio](https://www.isc.upenn.edu/apptio) and follow the instructions. An email confirmation will be sent after your account is created that will include instructions for accessing Apptio.

**How Can I Learn More About Apptio and My ISC Bill?**

**Office Hours**

ISC offers “walk-in” office hours to answer questions about your bills; no appointment is necessary.

- Dates: Thursday, December 14th and Thursday January 18th
- Time: 1:00 p.m. - 2:00 p.m. Feel free to walk in anytime during this time.

**Lunch and Learn**

Apptio Lunch and Learn sessions are scheduled for January 11th and January 25th from 12:00 - 1:00 p.m.

Register via Knowledge Link.

**Questions?**

Contact help@isc.upenn.edu or (215) 898-1000.

For more information, go to: [https://www.isc.upenn.edu/finance](https://www.isc.upenn.edu/finance)

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**BusinessObjects Web Intelligence and the Data Warehouse Office Hours September – December**

The final class for 2017 in the series of Warehouse/Business Objects Office Hours sessions is available for signup for KnowledgeLink [http://knowledgelink.upenn.edu](http://knowledgelink.upenn.edu). To find and enroll in this session, enter the word ‘freestylin’ in the ‘Find Learning’ search field after logging into KnowledgeLink. Sessions are open to users of all data collections, and listed in Knowledge Links as follows:

**Data Warehouse BusinessObjects Office Hours – Freestylin’-Open Lab**

**Wednesday December 13th 1:00 – 3:00 p.m.**

Please refer to Knowledge Link for detailed course descriptions and enrollment links. Minimum registration for each session is 6 people; insufficient registration may cause the course to be cancelled.

**The Bottom Line December 2017**

8
NIH has announced that new FORMS-E will replace the existing application FORMS-D. All proposals for the deadline of January 25, 2018, or later will be required to use the new forms. The latest NIH Notice can be found at this URL: https://grants.nih.gov/grants/guide/notice-files/NOT-OD-18-009.html

It contains links to other NIH sites providing information about these new forms, especially the updated Application Guide, which is now available.

Important Note: FORMS-E applies to applications DUE on or after 1/25/2018, regardless of when that application is submitted. For example, submitting an application prior to 1/25/18 with a due date of 2/5/18 still requires that FORMS-E be used. FORMS-E cannot be used for any submission with a due date prior to 1/25/18. Continue to use FORMS-D for those deadlines.

PennERA Proposal Development (PD) has been configured with the new forms and users were notified of that system update. Specific detail is being provided to system users, but basic information follows here about this update.

- Applications already created using FORMS-D that will need to use FORMS-E will be able to be updated.
- NIH has begun publishing new or updated Funding Opportunity Announcements.

Please contact PennERAhelp@lists.upenn.edu if you have any questions.

Summary of Changes to PennERA

NIH Pre-Submission Validation Web Service will be available. Users will be able to view and fully validate their applications at NIH prior to submitting them from PennERA.

More information about the Grants.gov status of an application will be available in each PennERA record on the Finalize screen.

Consolidation of human subjects, inclusion enrollment, and clinical trial information into one form.

Pieces of this information have been contained in various locations in prior forms versions packages but will now be located in one form in FORMS-E packages.

New form page entitled “PHS Human Subjects and Clinical Trials Information” added to PennERA record incorporates all information into this one form.

This form is required by NIH in most applications, as it now contains the basic Human Subjects question, “Are Human Subjects involved?”

In most applications, including some non-NIH federal agencies, Other Project Info will become one screen in the record.

For example, PennERA currently has several screens for data entry and uploads that are combined to create the Other Project Information form, including Project Summary, Project Narrative, References Cited, Other Attachments, etc.

As a result of the forms upgrade, any PD record created for an agency using the new version of this form (v1.4) will have just one screen for this information.
Did You Know...

...You can register for a Concur New User Class

Description: Instructor led class will cover everything in Concur from Booking Travel through filing an Expense Report for reimbursement. In addition, Penn Travel & Expense Policy, Approval Flows, Travel Advances, Reimbursement Cycles and Best Practices will also be covered. Class is excellent for new users and delegates. These classes are for those new to the University or those with new roles that require Concur travel booking and expense report knowledge.

- Monday, January 8, 2018
  1:00 p.m. - 3:00 p.m.
- Wednesday, January 17, 2018
  10:00 a.m. – 12:00 p.m.
- Friday, January 19, 2018
  10:00 a.m. – 12:00 p.m.

Click Here to Register or search in Knowledge Link for Concur/TEM: Booking, Expense Report Submission & Approval for New Users.

...an Individual Service Providers: Classification and Payment training has been added to Knowledge Line for December 19th – additional classes will be scheduled in 2018.

Who Should Register: This course is intended for anyone who is involved with any of the following:

- Hiring employees or temporary workers
- Processing honoraria payments
- Procuring the services of and paying independent contractors or other individual service providers
- Creating or approving BEN Buys requisitions or purchase orders for independent contractors

To register go to: http://knowledgelink.upenn.edu

Quarterly Quiz

Instructions: The following questions can be answered based solely on information contained in this issue of The Bottom Line.

To participate in the contest, please submit your answers via email to doftraining@pobox.upenn.edu no later than February 1, 2018

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

1. When is the next Individual Service Providers: Classification and Payment training?
2. What is the Monthly Pay Date for December 2017?
3. What is the last day a Purchase Order invoice should be received to ensure it is processed before December 31st?
4. What are the first three steps to add/change the Supervisor in Knowledge Link?
5. Name the new Senior Training Specialist in Financial System and Training Dept?
6. What are the two Procard posting dates included in this newsletter?

Last Quarter’s Winner:
Congratulations!
Cathy Bucher
Business Administrator
Biddle Law Library
To Check the Status of an eForm:

Go to: [http://www.upenn.edu/computing/da/eforms](http://www.upenn.edu/computing/da/eforms)

If you are the Initiator/Submitter:

- Click on the ‘My eForms status’ link on the left
- The list will show ALL eForms you submitted (BEN Financials, Data Warehouse, etc.)
- Find the eForm you want to review
- Click on the ‘Route Log’ icon on the right to view the routing history

If you are an Approver:

- Under ‘For Supervisor and Administrators’ section, click on the ‘eForms action list’ link
- You can perform a ‘doc search’ by entering one or more of the following search criteria:
  - Document/Notification Id
  - End-user’s PennKey or Penn ID by using the ‘Initiator’ field
  - Date range by using the ‘Date Created From’ and ‘Date Created To’ fields
  - Once you have entered your search criteria, click on the ‘Search’ button or [Enter] key
- You can also use the ‘eForms action list’ to view all eForms you have acted on
  - To determine the current status, look in the ‘Route Status’ column
  - To determine the action request by you, look in the ‘Action Requested’ column
  - To view the routing history, click on the ‘Route Log’ icon located in the last column
- You can also use the ‘Outbox’ to view all eForms which have been processed to date

NOTE: To view any notes, click on the ID number to view the eForm 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

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.

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

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

Quarterly Quote

“An investment in knowledge pays the best interest.”

Benjamin Franklin