**PennWorks Update:**

**Merit Increase Program Functionality Available**

This spring, the PennWorks team added annual merit increase tools into the PennWorks application. In April, a new spreadsheet export function was released and in May, a rapid data entry function became available to all Schools and Centers. Four Schools/Centers participated in a limited pilot to test the functionality of a salary modeling/planning tool expected to be generally available for the next annual merit increase cycle. The former merit increase system (SALINC) was retired.

The spreadsheet export functions include Role Export and Faculty Compensation Export:

- **Role Export** allows users to generate Excel spreadsheets to facilitate the modeling, routing, and approval of pay changes. This function replaced the spreadsheets distributed by the Compensation Office of Human Resources at the beginning of the merit increase process in April. Designated School/Center coordinators use this function to download the list of their merit increase eligible staff/faculty.

Annual Updating of Space@Penn a Must

The primary purpose for Space@Penn is the need for current and accurate information of space used for sponsored research. In order to ensure the information is accurate, the Space@Penn database must be updated at least annually to record any changes to assigned space. This includes updates such as:

- Faculty who have left the University
- New Faculty to the University
- Individuals assigned to new space
- Space under construction
- Department changes
- Any other physical changes to University space

If you are the Space Coordinator for your Department be sure to update your space, via the Space Web Updater, by June 30, 2010.

**PennWorks continued on page 2**

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**Fiscal Year 2010 Closing Instructions**

**Office of the Comptroller**

**website:**


See page 4 for Payroll, Accounts Payable & IDS Fiscal Year-End Cutoff Dates
PennWorks Update: Merit Increase Program Functionality Available

Continued from Page 1

- Faculty Compensation Export allows designated Home ORG users who process faculty compensation to generate Excel spreadsheets to facilitate the annual updates to components of faculty compensation, such as academic base.

The Rapid Entry functions include Role Rapid Entry and Faculty Compensation Rapid Entry:

- Role Rapid Entry allows users to update pay information and distributions for a group of employees. This function replaced one-at-a-time updating of records in the former merit increase system. School/Center coordinators responsible for updating pay and distribution information use this function in PennWorks, as well as coordinators responsible for bargaining unit updates.

- Faculty Compensation Rapid Entry allows users to update faculty compensation information, including Academic Base, for a group of faculty. This function replaced the spreadsheet faculty compensation surveys previously conducted each fall.

The Data Warehouse Salary Management collection has also been enhanced to support the Merit Increase Program. Information on the new tables and reports, with links to related documentation, is available at http://www.upenn.edu/computing/da/dw/salmgt/pennworks_fall2009.html.

End-User Support

For merit increase procedural questions, contact HR/Compensation at 8-1317 (215-898-1317) or visit the Faculty/Staff Merit Increase Program web page at http://www.hr.upenn.edu/Compensation/SalaryIncrease/Default.aspx.

Online reference materials for the PennWorks Export and Rapid Entry functions are available at http://www.finance.upenn.edu/ftd/documentation.shtml #pennworks in the "PennWorks Salary Increase Program - How To" section. There are also useful FAQs within the PennWorks application, which are accessible by clicking on "FAQ" in the top banner when logged on to the application.

Next Release: Additional Pay

The PennWorks team is planning to add Additional Pay functionality into PennWorks in Fall 2010. This next release will streamline the Additional Pay process, eliminating paper forms and automating routing and approvals. Anticipated features include:

- Ability for any PennWorks user to enter an Additional Pay request
- Availability of both individual and group Additional Pay requests
- Ability to copy an existing Additional Pay request
- Ability to request Additional Pays for a future pay date
- Ability to attach supporting documentation to the request
- Automatic routing to the next level approver via e-mail notification
- Ability to view request status throughout the approval process
- Ability for School/Center access administrators to manage their approver lists

Once the online Additional Pay features are available, paper forms will no longer be accepted.

We will continue to update the user community as the project develops and specific release dates are available.

More Information about PennWorks

For more detailed information about PennWorks, visit the PennWorks project page at http://www.upenn.edu/computing/isc/apps/pennworks/. Questions about PennWorks can be addressed to pennworks@lists.upenn.edu.

--Vincent Price, Provost
--Jack Heuer, Vice President for Human Resources
--Stephen Golding, Vice President of Finance and Treasurer
--Robin Beck, Vice President of Information Systems and Computing
Summer Federal Work-Study Program

The first day a student may begin working is May 17, and the last day is August 29. The summer pay schedule is available on the Student Employment Office website at www.sfs.upenn.edu/seo.

A new Job Appointment Form (JAF) is required for summer. The student must print the JAF from Penn InTouch, and present the JAF to the supervisor and department business administrator before the student begins working. The supervisor must enter the SEMS summer job number on the JAF.

Job Class Code 515375 (FWS Summer) must be entered on Penn Works for ALL summer jobs. The Object Code is 5139, and the Earnings Type is WSR (IN CLASS) or WS2 (NOT IN CLASS). The matching share contribution is 30% federal and 70% department.

If you have any questions, please e-mail John Rudolph at rudolph@sfs.upenn.edu.

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DATA CENTER OUTAGE: MANY NETWORKED APPLICATIONS AND SERVICES UNAVAILABLE ON JUNE 20, 2010

Many critical University applications and services will unavailable beginning at 12:01 a.m. on Sunday, June 20, when the University Data Center goes off-line for preventive maintenance of electrical systems. We are reserving twelve hours for the outage, until 12 noon on Sunday, though service may be restored somewhat earlier.

During the outage, many central University applications and services will be unavailable, such as BEN applications, PennERA applications, voicemail for traditional analog phones, Blackboard course management, the Franklin catalog, and the applications accessible through U@Penn and the student portal. A list of affected applications and services is posted at:

www.upenn.edu/computing/june-outage/

Important services that will remain available in most campus locations include the central web service (www.upenn.edu), central email services (Exchange and Zimbra), wireless services (AirPennNet and AirPennNet-Guest), regular wired PennNet, PennNet Phone, PennNet Phone voicemail, and traditional analog phone services. These services will not be available in a handful of buildings affected by the electrical outage: 3401 Walnut (including the shops), Van Pelt-Dietrich Library Center, Annenberg Center, Annenberg School, Franklin Building, Franklin Annex, 3615 Locust Walk, and the Jaffe Building.

Thank you for your understanding of this necessary interruption of service. If you have any questions or concerns about the outage, please contact your Local Support Provider (LSP). If you don’t know who your LSP is, please see:

http://www.upenn.edu/computing/view/support/
FY2010 Closing Dates - Payroll
Merit Increase via Penn Works (formerly SALINC)
FY 2011 salary increases can be processed on-line using Penn Works. Refer to FY 2011 Faculty/Staff Salary Increase Program Guidelines for detailed instructions.

<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday, May 10th, 12:00 a.m.</td>
<td>Merit Increase via Penn Works opens.</td>
</tr>
<tr>
<td>Tuesday, June 15th, 12:00 a.m.</td>
<td>Merit Increase via Penn Works closes.</td>
</tr>
<tr>
<td>Monday, June 14th, 5:00 p.m.</td>
<td>Supporting documents for new appointments to Personnel Records</td>
</tr>
<tr>
<td>Friday, June 18th, 5:00 p.m.</td>
<td>Additional pay forms to Payroll.</td>
</tr>
<tr>
<td>Monday, June 21st, 3:00 p.m.</td>
<td>Time reporting data entry of positive/exception employees.</td>
</tr>
<tr>
<td>Monday, June 21st, 3:00 p.m.</td>
<td>Payroll reallocations must be performed to be effective at FY 2010 Employee Benefit (EB) rates. Any reallocations after this date will be at the FY 2011 EB rates.</td>
</tr>
<tr>
<td>Monday, June 21st, 3:00 p.m.</td>
<td>On-line changes to the database for existing employees.</td>
</tr>
</tbody>
</table>

FY 2011 Payroll
First weekly payroll for FY 2011 will be for the week ending June 27th, 2010, and payable on July 2nd, 2010. Annual increases for weekly paid personnel will be effective for the week ending July 4th, 2010 and payable on July 9th, 2010.

Weekly Payroll for the Period Ending June 20, 2010

<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday, June 14th, 5:00 p.m.</td>
<td>Supporting documents for new appointments to Personnel Records</td>
</tr>
<tr>
<td>Friday, June 18th, 5:00 p.m.</td>
<td>Additional pay forms to Payroll.</td>
</tr>
<tr>
<td>Monday, June 21st, 3:00 p.m.</td>
<td>Time reporting data entry of positive/exception employees.</td>
</tr>
<tr>
<td>Monday, June 21st, 3:00 p.m.</td>
<td>Payroll reallocations must be performed to be effective at FY 2010 Employee Benefit (EB) rates. Any reallocations after this date will be at the FY 2011 EB rates.</td>
</tr>
<tr>
<td>Monday, June 21st, 3:00 p.m.</td>
<td>On-line changes to the database for existing employees.</td>
</tr>
</tbody>
</table>

Monthly Payroll for the Period Ending June 30, 2010

<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday, June 14th, 5:00 p.m.</td>
<td>Supporting documents for new appointments to Personnel Records</td>
</tr>
<tr>
<td>Wednesday, June 16th, 4:00 p.m.</td>
<td>Additional pay forms to Payroll.</td>
</tr>
<tr>
<td>Thursday, June 17th, 4:00 p.m.</td>
<td>Time reporting data entry for late pay, reduction in pay, and late pay approval.</td>
</tr>
<tr>
<td>Friday, June 18th, 5:00 p.m.</td>
<td>On-line changes to the database for existing employees.</td>
</tr>
<tr>
<td>Monday, June 21st, 3:00 p.m.</td>
<td>Payroll reallocations must be performed to be effective at FY 2010 EB rates.</td>
</tr>
</tbody>
</table>

FY2010 Closing Dates: Accounts Payable*

<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Friday, June 11th, 5:00 p.m.*</td>
<td>Final day to request Final Closing of Purchase Orders in FY 2010</td>
</tr>
<tr>
<td>Friday, June 11th, 5:00 p.m.*</td>
<td>C-forms to be processed in FY 2010</td>
</tr>
<tr>
<td>Friday, June 18th, 5:00 p.m.*</td>
<td>Purchase Order invoices to be processed in FY2010</td>
</tr>
<tr>
<td>Friday, June 18th, 5:00 p.m.*</td>
<td>Requests to correct and reverse receipts for FY2010</td>
</tr>
<tr>
<td>Thursday, June 24th, 5:00 p.m.*</td>
<td>Will Call Checks</td>
</tr>
</tbody>
</table>

FY2010 Closing Dates: IDS*

<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Friday, June 11th, 5:00 p.m.*</td>
<td>C-forms and Travel Reimbursements to be processed in FY 2010</td>
</tr>
<tr>
<td>Thursday, June 24th, 5:00 p.m.*</td>
<td>Will Call Checks</td>
</tr>
</tbody>
</table>

* These dates serve as cutoff dates in order to guarantee processing in FY 2010 for any of the above items in Accounts Payable or IDS. Throughout June 2010, Accounts Payable and IDS will continue to process all invoices, C-Forms, and travel reimbursements into FY 2010.

The Bottom Line June 2010
Office of the Comptroller

**Uncashed Check Due Diligence Process**

Schools and Centers must perform due diligence on all stale dated checks *(checks not cashed after 90 days of the end of the month in which it is issued)* issued on their behalf. This responsibility lies with the School and Center as they are in the best position to resolve any underlying issues which result in checks going uncashed (e.g., incorrect vendor address, incorrect vendor paid, duplicate or overpayment, etc.).

**Stale-Dated Checks on Grant Funds**

While a grant may have outstanding checks at the time of grant close out, the School/Center must review and investigate the outstanding checks to determine that none of these outstanding checks represent invalid payments (duplicate or overpayments) outstanding on grant funds. Invalid payments must be corrected prior to grant close-out to prevent voiding checks and cancelling invoices after the grant has closed and the final report has been submitted.

It is not necessary for the School/Center to eliminate valid payments from the list of outstanding checks for a grant fund as these may be later voided and reissued or reported to the state without impact to the grant. Due diligence must still be performed on grant stale-dated checks in accordance with the University’s procedures (discussed below) to attempt to unite the owners with their property prior to reporting to the state.

The 252 Uncashed Check – Fund Extract, available in the GL Reporting (Secured) responsibility, can be run on fund to identify outstanding checks in a grant fund or funds. Information on running the extract can be found at:

http://www.finance.upenn.edu/ben/benfin/documentati
on/reportdoc/quickv/252_FundExtract.pdf

**What is Due Diligence?**

Due diligence is reaching out to the payee on the check – either in writing or verbally – to determine the reason for the uncashed check. Once the reason for uncashed check has been determine, the School/Center representative then must correct the underlying issue where possible (e.g. check sent to incorrect address or incorrect payee) by voiding the original check and reissuing a new check. In instances where the check is not cashed due to duplicate or overpayment, the School/Center then must have the duplicate check and invoice cancelled without reissuing the check. Please note that issuing a replacement check without reaching out to the payee does not constitute due diligence and should not be done as:

- This will not resolve any underlying error which resulted in the uncashed check
- The replacement check is likely to come up for due diligence once it becomes stale-dated, especially if the underlying error is not corrected, resulting in duplicate effort by the School/Center which must now perform due diligence on the replacement check
- The dormancy period for the uncashed check is reset to the date of the replacement check, delaying the University’s reporting of the unclaimed property

**Monitoring of Due Diligence Efforts**

The Schools and Centers have 60 days to perform due diligence on checks that become stale in a given month. At the end of those 60 days, they must send a spreadsheet to the Comptroller’s Office indicating their due diligence efforts with regard to each stale-dated check. In the event the School/Center has no uncashed checks for a given month, it must notify the Comptroller’s Office that there were no stale-dated checks for that month. The due diligence monitoring spreadsheet sent to the Comptroller’s Office each month is forwarded to the Office of Research Services (ORS) so that it can monitor due diligence performed on grant funds.

On a quarterly basis, the Senior Business Administrator must also forward a certification indicating that due diligence has been performed on all stale-dated checks belonging to that School/Center. Annually, as part of the representation letter signed by officials of the School/Center, the organization must represent that due diligence has been performed on stale-dated checks.

Detailed due diligence procedures are available on the Comptroller’s website at:

http://www.finance.upenn.edu/comptroller/accounting/unclprop/
As we approach fiscal year-end, please be advised of the following closing guidelines for gifts.

**June 30 Gift Date end of year processing:**

- **July 8:** Last date to deliver to Gifts Accounting & Administration FY10 gifts (need June 30 postmark)
- **July 9 & 12:** Gifts Office will close for fiscal year end processing
  - Special Note: Contact Maria Perkins or your team representative if a gift is received during this time which requires immediate attention.
- **July 13:** Gifts Office will re-open for deliveries
- **July 14:** Last day of Gifts close-out
- **July 15:** Begin preliminary reporting

Given a movement to more corporate standards of reporting timeliness as required by Penn Trustees, the ‘mailbox rule’* will apply to GIFT DATE recording for June 30 gift date processing during the month of July.

Gifts will be processed with a June 30 gift date, so long as they are postmarked on or before June 30, 2010. Therefore, it is imperative for you to send fully completed gift transmittals and backup information, including postmarked envelopes, to Gifts Accounting and Administration (GAA) for June 30 gift date processing as quickly as possible. Very limited exceptions will be considered on a case-by-case basis.

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*This means the postmark on the donor’s envelope (rather than the date of receipt) determines the date of the gift.
It is crucial to **retain all envelopes** with any gift correspondence, which are submitted to the Office of Gifts Accounting & Administration, particularly at the approach of fiscal year-end and calendar year-end.

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**All June 30 postmarked donations must be received in Gifts Accounting and Administration by **Thursday, July 8, 2010** for inclusion in the gift date closing Monday, July 14, 2010.**

Notify Jean Suta or Kathy Nace in Securities Gifts (**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 close of business on June 30, 2010** in order to ensure they will be counted on the FY010 financials.

Should you have any questions on this information, contact Maria Perkins @ 8-8687, Jean Suta or Kathy Nace @ 8-7254 in the Treasurer’s Office.
The Division of Business Services announced that JoAnn Murphy has assumed full leadership of the Penn Purchasing Department. Ms. Murphy joined Penn in 2007 as director of purchasing with responsibility for managing the university’s sourcing strategies and staff associated with procuring goods and services. In addition to these previous duties, Ms. Murphy’s directorship now includes management of e-Business initiatives, the procurement cards and Penn’s Travel Department.

Ms. Murphy has over 15 years experience in global procurement encompassing a wide diversity of companies, including semiconductor manufacturing and IT/Telecom sourcing. Since coming to Penn, she has been instrumental in developing Green Purchasing initiatives such as point of use water filtration systems, order consolidation incentive program, and recycling of eWaste, ink/toner and writing instruments. She is committed to Socially Responsible Purchasing programs including sustainable purchasing and economic inclusion initiatives.

Ms. Murphy is a graduate of Pennsylvania State University and resides in Harleysville, PA.

Resend Purchase Order Request Form

Effective as of May 17, 2010, if you have a need to request to resend a duplicate copy of the Purchase Order to a supplier you will be required to complete a request form.

The Resend Purchase Order Request Form can be found in the Forms section of the Purchasing website:

http://www.purchasing.upenn.edu/forms/resend-purchase-order.php

This form only requires the PO #, Supplier Name and email and requester information to be submitted.

The form can be completed and submitted online. You will receive an email confirmation from Purchasing advising that the duplicate copy of your purchase order has been transmitted successfully.

Purchasing Services will process the request upon receipt from a requester and complete it within 1 business day.

Please direct all questions to Purchasing Services at purchsup@exchange.upenn.edu.
### NEW! PREFERRED TRAVEL AGENCIES – FEEL FREE TO FAX

<table>
<thead>
<tr>
<th>Agency</th>
<th>Fax</th>
</tr>
</thead>
<tbody>
<tr>
<td>American Express</td>
<td>1-623-707-4270</td>
</tr>
<tr>
<td>Marathon Travel</td>
<td>1-715-345-2192</td>
</tr>
<tr>
<td>Premier Travel</td>
<td>1-215-557-7273</td>
</tr>
</tbody>
</table>

You can now fax your travel authorizations directly to three preferred Travel Agencies.

Faxing them directly to the agencies eliminates the need to fax them through the Travel Services office and speeds the ticketing process. Remember, travel authorizations should be faxed back by 4:00 p.m. to ensure ticketing that day.

If you prefer to scan your Travel Authorizations and email them, you can email them to:

- **American Express**
  - UPENN@AEXP.COM
- **Marathon Travel**
  - CORPORATESERVICES@MARATHONTRAVEL.COM
- **Premier Travel**
  - REQUEST YOUR AGENT’S EMAIL ADDRESS

### THE TRAVEL PORTAL WEBSITE

The Travel Portal home page was relocated. Be sure you are using the correct URL which is: [http://www.upenn.edu/penntravel](http://www.upenn.edu/penntravel) and bookmark this page. The Travel Portal is the “go to” location for information on Penn’s preferred travel suppliers.

### FOR THE LATEST TRAVEL NEWS

For the latest Travel News, click here: [http://www.purchasing.upenn.edu/travel-news](http://www.purchasing.upenn.edu/travel-news)

### TRAVEL POLICY CHANGES FOR FY’11

#### Policy 2357 International Travel

In the past domestic travel was the United States its territories and Canada. Going forward, travel to Canada will be captured and coded as foreign travel.

#### Policy 2358 Lodging

The cost of lodging should be kept to a minimum by requesting standard room accommodations, whenever possible. Penn travelers are strongly encouraged to use standard accommodations at reasonably priced mid-market hotels or motels. Requests should be made for educational discounts or business traveler’s rates. Original itemized hotel receipts are required for reimbursement. The University does not approve accommodations at upscale or luxury hotels (Ritz, Four Seasons, etc.) However, an exception is made when a conference, workshop, or other college business is scheduled at a luxury or upscale hotel. When traveling to a conference, it is appropriate to stay at one of the hotels hosting the conference even if the rate exceeds the guideline.

#### Policy 2355 Air Travel

Coach accommodations should be used at all times and travelers are expected to take advantage of advance purchase rates and the University's negotiated discounts. Upgrades in coach class such as Economy Plus seating are considered a personal expense unless approved by the higher level approver on a Reimbursement Justification form.
By now you are probably smart enough to avoid carrying unencrypted sensitive data on portable devices; you use a complex password and you don’t share it with anyone; you save your important work to network drives and you keep your desktop and laptop current with antivirus software and updated security patches. But do you also dispose of, return to lessor, sell, or donate your printer or copier every few years?

WAIT!

Though we don’t often think of it this way, more and more office devices – including multifunction office printers – come with hard drives. The data you print, copy, scan, or fax is stored on that hard drive and in some cases, stored permanently unless you and your LSP do something about it. At a minimum, be aware that when you dispose of your printer, fax, copier or scanner, there may be a hard drive containing images of all of your documents unencrypted. Have the hard drive securely wiped before you give the device away or sell it, or if the device’s hard drive is removable, remove the drive entirely and have it securely destroyed. While the device is still in use in your office, consider its physical location—a secured or monitored area is preferable.

If you have questions regarding these issues, contact your LSP or Purchasing Services at the following address: rbeynon@upenn.edu.

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**Quarterly Quiz**

**Instructions:** To participate in the contest, please submit your answers to the questions at the right, found in this issue of *The Bottom Line*, via email to training@exchange.upenn.edu no later than August 1, 2010.

The Winner will receive a one year University Club Membership.

**Last Quarter’s Winner – Congrats!**
Anita M. Hall
Budgeting & Financial Manager
Facilities and Real Estate Services

1. What are the first pay dates for the Merit Increase Program for Weekly Paid Employees? Monthly?

2. Space@Penn must be updated by what date each year?

3. What is the date of the Data Center Outage?

4. When is the FY2010 cutoff date for AP C-Forms, IDS C-Forms, and Travel reimbursements for guaranteed processing?

5. What is the Job Class Code for Federal Work Study Summer Students and the Federal/Department contributions?

6. What is the date that all June 30, 2010 postmarked donations must be received by Gifts Accounting & Administration for inclusion in FY2010?

7. For a check issued by Penn, what is the timeframe for determining if a check is stale dated?
**PennMOVES – Move Out Volunteers Engaging in Service** collects items left behind by University of Pennsylvania students when they leave campus each summer. Last year over 90,000 pounds of items were collected.

This year, in partnership with United Way of South Eastern Pennsylvania, PennMOVES is holding a community sale at the Penn Ice Rink, 3130 Walnut Street, Saturday, June 5 from 8 a.m. to 6 p.m. In addition, bargain hunters can pay an early admittance fee of $5 for entry on a first-come, first-served basis between 8 a.m. and 10 a.m. Free parking is available. All items are sold as is. Sale items include televisions, refrigerators, printers and other small appliances; household and kitchen items, clothing, lamps, furniture (tables, sofas, and chairs); bikes, books, school supplies and other miscellaneous items. All proceeds from the sale will be given to United Way to provide funding for charities in West Philadelphia.

PennMOVES is sponsored by the University of Pennsylvania’s Division of Business Services.

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**Onboarding New Employees and PennCard**

New employees to Penn can obtain a PennCard one business day after the payroll record in PennWorks (Bio/Role/Distribution) has been entered into PennWorks. This allows new hires to receive their PennCard on or even before their start date, depending on when their information is entered into the PennWorks a.k.a. Personnel/Payroll system.

PennCard issuance for employees is NOT dependent on the Minimum Record indicator changing from “TX” to “OK.” Collection and submission of the appropriate W-4 and I-9 documentation to HR Records, in compliance with standard Payroll and HR procedures, is still required in order for an employee to get paid.

A Penn ID # is required before you are able to obtain a PennCard and/or PennKey. For more information about the PennCard and PennKey, go to the following websites: [http://www.business-services.upenn.edu/penncard/](http://www.business-services.upenn.edu/penncard/) [http://www.upenn.edu/computing/pennkey/]
PennCard Center

now offers passport photos.

Stop In

Sit, Smile, Grab your bags and Go!
Purchase your Passport Photos and receive a free travel document holder—while supplies last.

For more information visit www.upenn.edu/penncard/passport.

Need important documents notarized?

Now for your convenience, you can have them notarized right on campus at the PennCard Center.

Fees per document type determined by the State of Pennsylvania.

For more information visit www.upenn.edu/penncard/notary.
The eRA Commons has been upgraded in conjunction with eRA's system-wide software release. The updated functionality was made available to users as of **Friday, April 23**.

A sampling of the new features and fixes implemented in this release is listed below. The full release notes were available on **Monday, April 26**.

In addition to the new functionalities added to Commons and the implemented fixes, eRA Commons also is undergoing an upgrade as part of an eRA-wide systems upgrade. The updated technology, though not outwardly visible, will make Commons a more efficient and flexible system for users and for eRA staff. The upgrade is ongoing.

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**eRA Commons Features**

**PPF - Personal Profile**

**New Features**

**Continuous Submission**

- Displays three fiscal year options in the Continuous Submission (CS) Eligibility Period drop-down box (the box can be found under the Reviewer Service History & Continuous Submission Eligibility section of the Reviewer-Specific screen).
  - The first fiscal year option is the current fiscal year. The remaining eligibility periods represent the next two 12-month periods of eligibility.
- Displays a user's continuous submission eligibility status and a list of all eligible meetings for the past two- to 18-month period.

**My NCBI (National Center for Biotechnology Information) / My Bibliography**

- Displays the following on the PPF List of Publications screen:
  - All PI (Principal Investigator) citations residing in the My Bibliography system
  - Citation ID and Citation Text columns
  - Each citation's PMCID (PubMed Central Reference Number) or PMID (PubMed reference number), if available; otherwise, the system will display the NIHMSID (NIH Manuscript ID), as well as whether that ID is valid
  - A Grant-paper Association Action column
    - Possible actions include Reject and Confirm
  - A Grant-paper Association Status column
    - Possible statuses include Proposed, PI Confirmed, Rejected, and Official—no status information will show for PI-entered citations in Commons

**eSNAP - Electronic Streamlined Non-competing Award Process**

**New Features**

**My NCBI / My Bibliography**

- Integrates NCBI data into the Upload Science screen.
  - A PI or PI Delegate can associate citations with a particular eSNAP.
  - If a Grant-paper Association does not exist at the time of selection into eSNAP, a new association will be created.
- Each citation’s PMCID or PMID, if available; otherwise, the system will display the NIHMSID.
- Includes Citation ID hyperlinks that allow a user to view a citation at its source.
- Introduces “Added to eSNAP” status.

**xTrain**

**New Features**

- Allows users to update or amend any existing early termination records.
- Renders as “Read Only” the Appointment Period and Amount fields for a Trainee.

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**The Bottom Line**  
**June 2010**
FTD Fishing for Feedback

Have you been to a BEN Financials or Payroll training class within the last 6 months? If so, we’re looking for feedback and suggestions.

Now that you’ve settled in and actually have had a chance to use what you learned, we’d like to know:

- Did the class you attended prepare you for your job?
- Looking back, do you wish you learned more about a particular subject and less of another?
- How could Financial Training have better prepared you for the “real world”?
- Do you think additional subject matter should be added to our course offerings? If so, what would the topic be you would like to see offered?

Send us an email with your thoughts, suggestions, and ideas:
training@exchange.upenn.edu

Or call any one of the FTD staff members to discuss your ideas over the phone or to set up an in-person meeting:

- Jim Horstmann: 573-6717 jhorstma@upenn.edu
- Joe Mullock: 573-8988 jmullock@upenn.edu
- Barbara Murray: 898-1733 murrayb@upenn.edu
- Paul Weidner: 898-1447 weidnerp@upenn.edu

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**ERA Commons Fixes**

- Displays the correct and most up-to-date Appointment End Date when a PI initiates a TN for an amendment where the amendment has the Appointment End Date set earlier than the original Appointment End Date.

**Public Access Screen**

- No longer allows the creation of BASIC accounts.
  - The Create New Account link has been removed from the Public Access eRA Login screen. All existing, non-affiliated accounts with BASIC and PI roles were removed, if the account was not associated with any grants.

**FCOI (Financial Conflict of Interest)**

- Allows edits to be made to the previously un-editable fields on the FCOI Edit screen.

**Status**

- Displays records with the correct Budget End Dates when a user performs a General Search query.
Penn Profiler is the University’s web-based tool that enables you to self-identify many of your work-related training needs and requirements. The Profiler survey takes about 10 minutes to complete, and should be updated annually. When you receive your notification e-mail, log in to Penn Profiler and complete the survey. New training assignments may result, depending on your responses to the questions about academic activities and/or job responsibilities which may have changed over the course of the year.

For login and support information, please visit: http://www.upenn.edu/computing/admin-elearning/pennprofiler

Why Penn Profiler?

Penn Profiler is part of the University’s overall education initiative regarding safety, research compliance, and other trainings required by Federal, State, and University policies and regulations as well as training related to administrative job skills or responsibilities. The survey contains sections pertaining to Administration and Finance, Sponsored Projects, Environmental Health and Radiation Safety, Animal Care and Use, Human Subjects Research, Clinical Care and Development & Alumni Relations activities. Training assigned by Penn Profiler can be completed through Knowledge Link, a learning management system that delivers University and Health System training. For more information on Knowledge Link, go to: http://www.upenn.edu/computing/admin-elearning/knowledgelink/

Who Needs to Take Penn Profiler?

The Penn Profiler survey must be completed by all full- and part-time Penn faculty and staff including student workers, adjuncts, CHOP affiliates, graduate students and temporary employees. It must be completed at least annually or more often if an individual’s job responsibilities change.

What are the Responsibilities of Supervisors?

As part of the survey, you are asked to enter the email address of your job supervisor. Supervisors are notified of training assignments made by Penn Profiler (as well as other assignments the you may have in Knowledge Link), and supervisor can also access the Learning Management System Reports on an ongoing basis to monitor your training. For more information on LMS Reports, go to: http://www.upenn.edu/computing/da/dw/benreports/reportdoc_lms.html

Benefits of Penn Profiler

Benefits of the Penn Profiler include the following:

- Provides a user-friendly, web-based, self-service application to identify and assign in a timely manner task-appropriate training
- Provides the research and administrative communities with easily accessible tools to assign, manage, maintain and report training information (in conjunction with Knowledge Link)
- Strengthens the University’s ability to meet ever-changing federal and regulatory compliance requirements and demands for accountability
- By facilitating training, strengthens knowledge of appropriate best practices that will prepare individuals to do their jobs safely and effectively

Additional Information

Questions about the Penn Profiler can be addressed to PennProfiler@lists.upenn.edu.

—Steven J. Fluharty, Senior Vice Provost for Research
—Stephen Golding, Vice President for Finance & Treasurer
—Chris Kops, Vice Dean for Administration and Finance, SOM
—Robin H. Beck, Vice President, Information Systems and Computing
The Learning Management Reports: How to Track the Status of Knowledge Link Training

As a supervisor, departmental or lab administrator, do you ever need to check if staff members have completed their required training in the Knowledge Link Learning Management System? 
(http://www.upenn.edu/computing/admin-elearning/knowledgelink/index.html)

If so, the Learning Management Reports 
(http://www.upenn.edu/computing/da/dw/benreports/reportdo_e_lms.html)

from the data warehouse may be just the tool for you. The LMS Reports (in Ben Reports) allow you to view or download the training records for individual employees, or for whole departments, schools or centers. Access to this information requires authorization from the appropriate supervisor or department head.

What Kinds of Training Courses are Tracked in the LMS Reports?

University employees may be required to take courses for regulatory compliance, worker health and safety, and administrative or job skills training. Many of these Knowledge Link courses are assigned as required to faculty, staff or student workers by their annual Penn Profiler training survey. In addition, there are a variety of optional courses on Knowledge Link that staff may take for additional training. Training Records for all courses completed in Knowledge Link are stored in the LMS Data Collection in the University’s Data Warehouse. The LMS Reports provide an easy way to run reports on this data by trainee, course or business unit.

Which LMS Reports Might Be Useful To Me?

The three most popular LMS Reports are:

- **Supervisor’s Report**: This report shows the training records for all employees who report to a particular supervisor (as identified by the supervisors email address entered by the trainee in the Penn Profiler survey.) The trainee’s registration and completion status for all required courses is listed in the report.

- **Required & Optional Training by ORG/Business Unit**: This report shows course information for trainees that fall under a selected business unit or general ledger org code. The report data includes registration and status information for particular courses you may specify, or for all of the courses that the trainees are currently required to take. In addition, information on optional courses can be included if the trainees have registered for those courses.

- **Required Courses by Trainee**: This report shows registration and completion status information on the courses that are currently required for up to six individual trainees, as identified by Penn ID.

How Do I Request Access To the LMS Reports?

In order to run the LMS reports, you will need to complete a data access request form, including the authorizing signatures from your department administration. If you do not already have access to the Learning Management data collection in BEN reports, complete the access form found at: http://www.upenn.edu/computing/da/dw/benreports/For mbenrpts.pdf, check box 1 for Learning Management Reports in Part 2, obtain the appropriate signatures (usually your business administrator or supervisor), and send the completed form to the address listed on the last page. You will be notified by ISC as soon as your access is available.

*NOTE: If you do not have access approval, any report will say "No rows returned"*

Once I Have Access, How Do I Run LMS Reports?

To run the web-based LMS Reports, follow these steps:

1) Go to the BEN homepage (http://benapps.isc-seo.upenn.edu/)
2) Click the BEN Reports link
3) Logon using your PennKey and PennKey password
4) Click the Learning Management Reports link
5) From the list of LMS Reports, choose the particular report you wish to run
6) Enter the parameters for the report (such as supervisor email, org number, or trainee Penn ID)
7) Click ‘Run Report’, and view the results
8) Click the link to ‘Download full results to Excel’

Help and More Information

If you have questions, or need help with the LMS Reports, please contact KL_help@lists.upenn.edu.
DID YOU KNOW...

... ABOUT THE NEW BEN FINANCIALS FUNCTIONALITY THAT BECAME EFFECTIVE MAY 17, 2010

Below is a list of the changes/enhancements that were incorporated into BEN Financials as of May 17, 2010. In the pages of this ‘Between the Lines’ issue of The Bottom Line, you can read more detailed information regarding these changes as well as additional important reminders.

http://www.finance.upenn.edu/ftd/Bottom_Line/May10.pdf

1. Req/PO Approval Notification E-mails
   These will be notification only e-mails

2. Self-Service Password Reset
   User will no longer need to walk to 3451 Walnut St. to have password reset!

3. Password Case Sensitivity
   Case sensitivity will be enforced

4. New Encumbrance Relief Process
   Small $ PO encumbrance to be relieved

5. Assets Trigger for Taggable and Date Fields
   Assets updated when Tag # is entered

6. GL Journal Context Field Updated
   01 & 07 labels adjusted

...There is one place where every ‘past or potential’ financial trainee can go to see the following:

What Business Training and/or Access is Needed?
How Do I Register for This Training?
Where to Find the Access Form?

Simply click here:

http://www.finance.upenn.edu/ftd/Training_&_Access_Forms.htm

...For more information regarding courses offered, including course descriptions, how to register for a financial training course, documentation, the financial training calendar, previous issues The Bottom Line, & FTD please go to:

http://www.finance.upenn.edu/ftd/