BEN FINANCIALS
FISCAL YEAR-END REMINDERS

Below you will find helpful information to assist you during the FY2011 closing process. The fiscal year-end closing instructions are available here: http://www.finance.upenn.edu/comptroller/accounting/closing_instruct.shtml

Manage Open Encumbrances

Start by running the 163.ORG: Open Encumbrances Report. This report displays the outstanding encumbrance amount for PO distributions. It reflects the sum of all encumbrances (debits and credits) which have been matched to the PO and the 26-digit account combination presented. To relieve open PO encumbrances perform one of the following actions:

- For purchase orders that have been fully expensed (billed) and still have a remaining encumbrance the PO should be Finally Closed in order to relieve the encumbrance. Further details on finally closing a PO is located here: http://www.finance.upenn.edu/benknows/browse_topics/purchaseord_def.shtml#finalclose

BEN Financials continued on page 2

BEN FINANCIALS WEB ADDRESS HAS CHANGED!!!!

As a result of the BEN Financials re-host on May 16th the web address to the BEN Financials application has changed.

Please use the following web address to access BEN Financials:

https://benapps.isc-seo.upenn.edu/

Tip: Please review the bookmark that you may have previously saved for BEN Financials. This bookmark should be saved with the above web address.

If you have any questions, please call BEN Helps at 215-746-4357.

Additional Newsletters
Executive Vice President’s Office
http://www.evp.upenn.edu/

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BEN FINANCIALS FISCAL YEAR-END REMINDERS

- For purchase orders that have not been billed and will not be fulfilled should be canceled. Further details on cancelling a PO are located here: http://www.finance.upenn.edu/benknows/browse_topics/purchaseord_def.shtml#cancelpo

- If an encumbrance balance remains for a canceled and/or finally closed PO, see the BEN Knows instructions for relieving the encumbrance: http://www.finance.upenn.edu/benknows/browse_topics/encumb_def.shtml#relieving.

**NOTE:** The cutoff day to request Final Closing of Purchase Orders in FY 2011 is Friday, June 10th, 5:00 p.m. (Requests submitted after June 10th may still be processed before the end of the fiscal year. However, due to the increased volume of requests during this time of year Accounts Payable cannot guarantee they will be processed in FY11).

Manage Uninvoiced Receipts

As a part of the year-end closing process, the Comptroller’s Office will run the Receipt Accrual program. This program is run annually to book an accrual entry to the general ledger to account for merchandise or services provided to the University on or before June 30, 2011, that have not yet been billed by the vendor.

The program looks at each line item for all open purchase orders (POs), then compares the quantity received (input by PO Buyer) to the quantity billed (input by Accounts Payable). If the quantity received exceeds the quantity billed, the difference is multiplied by the unit price on the PO and posted as a charge in JUN-11 to the account identified in the PO.

The journal is then reversed into the JUL-11 period, in anticipation of the invoice being processed in the next fiscal year. The accrual program will not include any accrual entries of less than $1,000. Prior to the accrual process running on June 30th you should manage your departments uninvoiced receipts so that you know what will be accrued.

- Run the 900.Uninvoiced Receipts Report (with the Minimum Extended Value parameter set to 1,000). This report allows you to review purchase order line information for goods and services that have been receipted in BEN Financials but have not yet been billed. The 900 report is only available in the Senior BA Reporting responsibility. Details on the 900 report are available here: http://www.finance.upenn.edu/ben/benfin/documentation/reportdoc/quickv/900.shtml

- Additionally, the 901.Overinvoiced Uninvoiced Receipts Report can be used to view uninvoiced receipts where the quantity billed is greater than or equal to the quantity ordered. Uninvoiced receipts on the 901 report do not show on the 900 report and are not part of the year-end receipt accrual. The 901 report is only available in the Senior BA Reporting responsibility. Details on the 901 report are available here: http://www.finance.upenn.edu/ben/benfin/documntation/reportdoc/quickv/901.shtml

After reviewing the reports, you may need to have receipts corrected or reversed. To request these changes send an e-mail to: apsup@pobox.upenn.edu and include the following information:

- Purchase Order Number
- PO Receipt number
- PO Line number
- What the Receipted Quantity should be

**NOTE:** The final day to request to correct and/or reverse receipts for FY2011 is Friday, June 17th, 5:00 p.m. (Requests submitted after June 17th may still be processed before the end of the fiscal year. However, due to the increased volume of requests during this time of year Accounts Payable cannot guarantee they will be processed in FY11.

BEN Helps & BEN Knows

Do you need help? **BEN Helps** is the support service for users of the University's business and financial applications. By simply dialing 6-HELP (215.746.4357) and entering your 2-digit School/Center code (the first 2 digits of your CNAC), you can get help with BEN Financials, BEN Reports, Travel, PennWorks and more.

Or, visit **BEN Knows** at: http://www.finance.upenn.edu/benknows/browse_topics/to browse and search for possible solutions to your BEN Financials and BEN Reports questions. Remember: We’re here to help! Call or visit us today.
### FY2011 Closing Dates - Payroll

**FY 2012 Payroll**

First weekly payroll for FY 2012 will be for the week ending July 3rd, 2011, and payable on **July 8th, 2011**. Annual increases for weekly paid personnel will be effective for the week ending July 10th, 2011 and payable on **July 15th, 2011**.

**Weekly Payroll for the Period Ending June 19th, 2011**

<table>
<thead>
<tr>
<th>Date</th>
<th>Task Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday, June 13th</td>
<td>Supporting documents for new appointments to Personnel Records</td>
</tr>
<tr>
<td>Friday, June 17th</td>
<td>Additional pay on-line forms to Payroll.</td>
</tr>
<tr>
<td>Monday, June 20th</td>
<td>Time reporting data entry of positive/exception employees.</td>
</tr>
<tr>
<td>Monday, June 20th</td>
<td>Payroll reallocations must be performed to be effective at FY 2011 Employee Benefit (EB) rates. Any reallocations after this date will be at the FY 2012 EB rates.</td>
</tr>
<tr>
<td>Monday, June 20th</td>
<td>On-line changes to the database for existing employees.</td>
</tr>
</tbody>
</table>

**Monthly Payroll for the Period Ending June 30, 2011**

<table>
<thead>
<tr>
<th>Date</th>
<th>Task Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday, June 13th</td>
<td>Supporting documents for new appointments to Personnel Records</td>
</tr>
<tr>
<td>Wednesday, June 15th</td>
<td>Additional pay on-line forms to Payroll.</td>
</tr>
<tr>
<td>Thursday, June 16th</td>
<td>Time reporting data entry for late pay, reduction in pay, and late pay approval.</td>
</tr>
<tr>
<td>Friday, June 17th</td>
<td>On-line changes to the database for existing employees.</td>
</tr>
<tr>
<td>Monday, June 20th</td>
<td>Payroll reallocations must be performed to be effective at FY 2011 EB rates.</td>
</tr>
</tbody>
</table>

**FY2011 Closing Dates: Accounts Payable**

<table>
<thead>
<tr>
<th>Date</th>
<th>Task Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Friday, June 10th</td>
<td>Final day to request Final Closing of Purchase Orders in FY 2011</td>
</tr>
<tr>
<td>Friday, June 11th</td>
<td>C-forms to be processed in FY 2011</td>
</tr>
<tr>
<td>Friday, June 18th</td>
<td>Purchase Order invoices to be processed in FY2011</td>
</tr>
<tr>
<td>Friday, June 18th</td>
<td>Requests to correct and reverse receipts for FY2011</td>
</tr>
<tr>
<td>Thursday, June 24th</td>
<td>Will Call Checks</td>
</tr>
</tbody>
</table>

**FY2011 Closing Dates: IDS**

<table>
<thead>
<tr>
<th>Date</th>
<th>Task Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Friday, June 11th</td>
<td>C-forms and Travel Reimbursements to be processed in FY 2011</td>
</tr>
<tr>
<td>Thursday, June 24th</td>
<td>Will Call Checks</td>
</tr>
</tbody>
</table>

*These dates serve as cutoff dates in order to guarantee processing in FY 2011 for any of the above items in Accounts Payable or IDS. After these dates, Accounts Payable and IDS will continue to process all invoices, C-Forms, and travel reimbursement, but cannot guarantee they will be processed in FY 2011.*
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 11:** Last date to deliver to Gifts Accounting & Administration FY11 gifts (need June 30 postmark)
- **July 12 & 13:** 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 14:** Gifts Office will re-open for deliveries
- **July 15:** Last day of Gifts close-out
- **July 18:** 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, 2011. 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 **Monday, July 11, 2011** for inclusion in the gift date closing Friday, July 15, 2011.**

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, 2011** in order to ensure they will be counted on the FY11 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.
Mandatory Purchasing Card Refresher Training

Starting June 1st, in accordance with the "Use of a Purchasing Card" Policy #2303 Purchasing cardholders must complete a bi-annual refresher training course in order to retain use of their Purchasing Cards. All cardholders who have not taken a refresher course in the last two years will be notified by the Purchasing Card Administrator of this requirement and will have 2 months to complete their training. If the training is not complete after the 2 month period, the card will be deactivated. The Purchasing Card Administrator will be sending cardholders a detailed message with instructions on how to complete the training on KnowledgeLink. If cardholders should have any questions or concerns please contact the Purchasing Card Administrator at pcardsup@exchange.upenn.edu.

Need to Buy Items? Don’t Have Access to BEN Buys?

Shopper Role Coming in July - New Feature for University Faculty and Staff to shop for items in the PENN MARKETPLACE!

As a result of feedback from the user community, Purchasing Services is introducing a Shopper Role to the PENN MARKETPLACE. Shoppers will have the ability to select and configure products easily by:

- Accessing the Marketplace from the Purchasing Services website and authenticating with their PennKey, without training.
- Viewing Penn specific pricing and special Penn promotions with real time availability.
- Shoppers will have the ability to add items (and notes) to a cart and then assign the cart to a person (assignee) in their department. A default assignee can be created in your profile. The assignee, a BEN Buys Requisitioner, will review the cart and proceed with the process for a purchase order to be issued. Carts can be unassigned by the Shopper or rejected/deleted by the assignee.
- Adding comments to their shopping cart which will forward to the assignee the information needed to complete the ordering process.

Shoppers must adhere to University procurement policies, as specified in the Procurement Section of the University Financial Policy Manual at: www.purchasing.upenn.edu/buyinfo/fin_policies.php or contact their assignee regarding procurement procedures and policies. Additional information about the Shopper Role can be found at: www.purchasing.upenn.edu/shopper
New Option for Pay and Reimbursements

In support of the University's sustainability initiative, we're introducing a new option for receiving payments from Penn. You now have a choice to receive your pay and reimbursements through either Direct Deposit or the new ADP TotalPay® Card system (VISA® debit card).

If you're already enrolled in Direct Deposit, you don't need to do anything—your pay will continue to be deposited into your account.

But if you currently receive paper paychecks, and you didn't select a new payment option by April 14, 2011, you were automatically enrolled in the ADP TotalPay® Card system. Note that this only applies if you received a paycheck between October 15, 2010 and April 15, 2011. If you were hired after April 15, and don't enroll in Direct Deposit, you'll be enrolled in the TotalPay® Card system in early June.

Direct Deposit is the quick and easy option if you prefer to have your pay deposited into your personal US bank account every payday. You will have immediate access to your funds.

The TotalPay® Card system is new to Penn. We've partnered with ADP® to provide this flexible and comprehensive payment solution that includes a Visa®-branded debit card, self-service checks and a personalized online account. Payment is automatically loaded into your TotalPay® Card account every payday, providing immediate access to your funds. Neither a bank account nor credit approval is required. You can use the TotalPay® Card as a Visa® debit card for purchases, to pay bills online, withdraw money from ATMs, and get cash back after purchases. You can also cash a check for the full amount of your pay, or write checks (provided by ADP®) against your TotalPay® account.

Whether you choose Direct Deposit or the new ADP TotalPay® Card, it's important to always keep your home address up to date. You can do so through your Business Administrator or on the U@Penn website at www.upenn.edu/u@penn (select My Profile to update your home address).

For more information on these payroll options, please visit Payroll's website at www.finance.upenn.edu/comptroller/payroll/receiving_your_pay.shtml

The choice of either Direct Deposit or the TotalPay® Card system provides these advantages:
• Immediate access to funds on payday
• No need to travel to campus to pick up checks
• No standing in line to cash checks
• No check-cashing fees
• No need to carry large sums of money after cashing checks

If You Didn’t Elect Direct Deposit By April 14, 2011:
• You should have received an ADP TotalPay® Card kit. It was sent to your home address in late April. The kit includes a blue Visa®-branded debit card, checks and instructions for activating your card. If you didn’t receive a kit, please contact the Payroll office at payroll@exchange.upenn.edu
• If you haven’t elected Direct Deposit, you’ll continue to receive paper checks until Penn completes the transition to the TotalPay® Card system in late June. After the transition, your pay will be automatically deposited into your TotalPay® Card account each payday. This will start with the June 24 pay if you’re paid weekly and the June 30 pay if you’re paid monthly. As of June 30, travel reimbursements and other payments will also be made based on your choice of Direct Deposit or the TotalPay® Card system.
• You received the TotalPay® Card early so you have plenty of time to activate it and become acclimated to the TotalPay® Card system before you stop receiving paper checks. Please keep it in a safe place.
• You can add your own money to your TotalPay® Card account and begin using it even before Penn begins depositing your pay to it.
• You’ll still be able to switch to Direct Deposit at any time. To enroll, visit www.upenn.edu/u@penn and click on Update Direct Deposit.

The Bottom Line

June 2011
Introducing Secure Space: Easy-To-Use Shared File Storage for Collaborative Projects

ISC has recently released Secure Space, a new, web-based service that provides secure file storage to support collaboration with colleagues at Penn and other institutions. Secure Space is flexible and easy-to-use, offering quick setup of storage spaces, user access controls, and free and paid spaces. The free space option will likely meet the needs of many projects and teams, while the paid option offers a more robust feature set, including support for authentication with credentials issued by other institutions. Please note that Secure Space is distinct from ISC’s Secure Share service, which is used to exchange sensitive or confidential information electronically.

How Secure Space Works
Any faculty or staff member (“space owner”) can define a virtual storage space for documents, authorize users (“members”), and customize what they see in the space. A project milestone chart can be maintained and prominently displayed. Three access options are available: download/upload, download-only, or administrative access. Users can view, create, and remove folders; upload and download files; “lock” files to ensure that others don’t work on them simultaneously; and “watch” file activity. Files are encrypted while being uploaded, downloaded, and stored. Users can also view logs and access old file versions. (Certain of these functions are not available to “download-only” users.) All data are held at Penn, reducing some of the risks associated with popular, cloud-based collaboration services, such as DropBox and BaseCamp.

Using External Credentials
As mentioned earlier, paid spaces allow authorized external users to use credentials other than PennKey to log in. If their institution is a member of the InCommon Federation, which includes nearly 300 members from higher education, government, non-profit, research, and commercial partners, external users can log in using their home institution credentials. (See http://www.incommonfederation.org/participants/ for a list of InCommon members.) If they do not have a username and password from an InCommon institution, or if their institution’s login system is not compatible with Penn’s, they can register for a free username and password from ProtectNetwork, a credentialing service that is an InCommon partner. To accommodate external credentials, logging in to Secure Space begins at a new screen, shown below, which allows users to choose PennKey/Penn WebLogin or the organization whose credentials they will use.

Benefits of Secure Space
- Provides a secure, flexible, easy-to-use collaboration environment
- Supports collaboration with colleagues outside of Penn
- Reduces the University’s exposure to data compromise issues
- Mitigates many of the risks associated with commercial “cloud” services:
  - Unavailability of data due to business failure, prolonged service interruptions, or poor backup practices
  - Insufficient safeguards protecting sensitive information, including FERPA or HIPAA regulated data
  - Off-shore data storage, potentially posing problems of foreign government access to data or export control problems
  - Data ownership terms that give unacceptable rights to service owners

If you are planning a new project or would prefer to have existing project files on a Penn server rather than “in the cloud,” we invite you to use Secure Space. Additional information and a link to Secure Space are available at http://www.upenn.edu/computing/security/secure-space/.

The Bottom Line  June 2011
DID YOU KNOW...

...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/

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, 2011.

The Winner will receive a one year University Club Membership

Last Quarter’s Winner – Congrats!
Cathy Bucher
Business Administrator
Biddle Law Library

1. What are the FY11 closing dates for C-Forms and Purchase Order Invoices?
2. What date will mandatory Purchasing Card refresher training begin and how frequently will it need to be taken?
3. Who is required to complete the Penn Profiler and how often?
4. What is the name for the new 'role' for those who want to procure goods from the Penn Marketplace?
5. Which report do you run to view outstanding encumbrances?
6. Name one of the most popular LMS Reports.
7. Name one benefit of 'Secure Space'.
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 must be updated annually. When you receive your notification e-mail, log in to Penn Profiler and complete the assessment within 30 days. 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 assessment 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, click here.)

Who Needs to Take Penn Profiler?
Penn Profiler 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.

New employees (faculty, staff and student workers) will receive an email notification once their Penn Profiler account has been activated (typically within a week of becoming active in Payroll.) Penn Profiler must be completed within a month of assignment, and annually thereafter. Email reminders will be sent automatically until your annual requirement is met.

What Are the Responsibilities of Supervisors?
As part of the questionnaire, 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 that you may have in Knowledge Link), and supervisors can also access the Learning Management System Reports on an ongoing basis to monitor your training. (For more information on LMS Reports, click here.)

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. Beek, 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?

If so, the Learning Management Reports 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 via Penn eForms from the appropriate supervisor or department head.

What 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 courses are assigned as required to faculty, staff or student workers in Knowledge Link by their annual Penn Profiler training assessment. In addition, there are a variety of optional courses on Knowledge Link that staff may take for additional training. 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.) 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. Report data includes registration and status information for specified courses, or for all required courses. In addition, information on optional courses can be included if the trainees have registered for those courses.

- **Required & Optional Courses by Trainee:** This report shows registration and completion status information on the courses 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 authorization from your departmental administration. If you do not already have access to the Learning Management data collection in BEN Reports, complete the electronic access form via Penn eForms.

*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.

The Bottom Line June 2011
Form I-9 Eligibility Verification

Effective immediately, there will be some changes to the Form I-9 employment eligibility verification process. Penn is required to have a Form I-9 for each employee we hire to work in the United States, regardless of citizenship. Failure to comply can result in civil monetary penalties of up to $1,100 per violation. All I-9 documentation takes place through the TALX I-9 service.

The changes are:

1. **No P.O. Box addresses**—P.O. Boxes are no longer permitted in the address field. Anyone who tries to enter a P.O. Box as the employee’s address will receive an error message and will not be allowed to proceed to the electronic signature page.

2. **Editing Social Security Numbers**—Edits to Social Security Numbers (SSN) will now be captured in Section 1 of the online I-9 form, rather than Section 3. You can add or edit an SSN or mark an SSN as bad.

As a reminder, if you have a new hire who doesn’t yet have a valid SSN, you need to follow a specific process. When you complete the I-9 form online, check the box marked “SSN applied for”. However, individuals can only be in the system for a limited amount of time without an SSN. As soon as the new hire brings you his/her valid SSN, you must enter the SSN in Section 3 of the online I-9 form.

If you have any questions, please contact Human Resources at 215-898-7288.

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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