BEN Financials Penn eForms are Here!

Effective March 1, 2012, the BEN Financials Access Request Form and the BEN Financials ID/Name Change Request Form will be available exclusively via Penn eForms.

What are Penn eForms?

Penn eForms is an on-line application for submitting, routing, approving, tracking and reporting on requests for access to administrative systems used by staff and faculty across the University. Penn eForms replaces the current time-consuming manual process, which involves multiple handoffs of paper forms, with a streamlined, web-based process that will improve productivity and support Penn’s sustainability goals.

Key Features of the Penn eForm:

- Authentication with a PennKey and Password places certain information into the eForm automatically, and also functions as an electronic signature for each person who acts on the form (i.e. Requestor, Supervisor, Access Administrator, etc.)
- The Requestor selects a Supervisor from a pick list. The eForm will then be automatically routed to the Supervisor
- The Supervisor selects the School/Center Access Administrator from a pick list. The eForm is then automatically routed to the School/Center Access Administrator.
- After the School/Center Access Administrator approves the eForm it is routed to Financial Systems for processing.
- Once the eForm has been approved and processed by Financial Systems, the Requestor will receive an e-mail that will contain the BEN Financials Username ID and instructions on how to obtain their new password. Please Note: Obtaining the new password will be identical to the process that is currently in place for generating a new password. Click below:
  
  Generate New Password

Continued on Page 2

Migration from Wachovia to Wells Fargo

The migration of University of Pennsylvania bank accounts from Wachovia Bank to Wells Fargo Bank NA took place over the weekend of February 18-19, 2012. With this migration is a change to our banking instructions for incoming payments via wire transfer or ACH. Please note that there is a three month grace period where any payments sent using the old wire instructions will be credited to our account.

Going forward the wire instructions, which includes Vendors and/or Donors, are as follows:

Wells Fargo Bank N.A.  
420 Montgomery Street  
San Francisco, CA  94101

For Domestic Wires and ACH’s:  
ABA Routing #: 121-000-248

For International Wires Only  
SWIFT CODE: WFBIUS6S  
CHIPS: 0407

If you have questions or concerns regarding these instructions please visit our website at: http://www.finance.upenn.edu/treasurer/cashman/ or call 215-898-7256 and we will be happy to assist.
To: All Payroll Administrators


Please instruct all staff and all new hires to use the updated form going forward.

From: The Payroll Office
Offer Letter Templates

Over the past year or so, the Office of Human Resources - in collaboration with Payroll Tax, Office of International Programs, and members of the University community - met to discuss how to improve the on-boarding process of Non-Resident Aliens, as it relates to hiring at Penn. One suggestion was to enhance the initial Offer Letter Templates to include the following information:

For Non-Resident Alien Only

Below is additional required information relating to your employment at the University of Pennsylvania:

- Please contact International Student and Scholar Services (http://www.upenn.edu/oip/iss/) upon your arrival to the University of Pennsylvania.
- If you do not have a U.S. Government issued Social Security Number (SSN), wait 10 business days before submitting an application to the Social Security Administration Office. Instructions on how and where to apply for a social security number can be found on ISSS’s website at: http://www.upenn.edu/oip/iss/sdn/scholar
- You may be eligible for tax treaty benefits. Please visit the IRS website at http://www.irs.gov/ to see if the US has a tax treaty with your country. If there is a tax treaty, you must visit the following office, to determine if the tax treaty is applicable to your specific payroll situation:
  Payroll Tax Office
  3451 Walnut Street
  Franklin Building, 4th Floor
  Monday – Friday
  10:00 a.m. – 2:00 p.m.

Note: Before visiting this office, you must have a valid US Tax Identification Number (i.e. SSN or ITIN) and your Minimum Record in PennWorks must be ‘OK’.

Your Departmental Payroll Coordinator can assist you with the ‘OK’ determination in PennWorks.

The following additions to offer letters for all new employees were also suggested:

- Job Grade
- Job Class
- Monthly/Weekly
- Exempt/Non-Exempt

The enhanced Offer Letter Templates can be found at the following website: http://www.hr.upenn.edu/Recruitment/Forms.aspx

Feel free to adjust these letters as your School/Center/Department requires. We hope you enjoy the new enhancements.

New Hire Checklist

Another suggestion to assist hiring departments with the appropriate required forms for a new hire at Penn was to provide a ‘New Hire Checklist’, which includes Faculty, Staff, Students, Post-Doctoral Appointments and Non-Resident Aliens. Below is the link: http://www.hr.upenn.edu/Recruitment/RecruitmentForms/newhires.pdf

Included in this list is the required information for a Non-Resident Alien:

- I-9*
- W-4
- Signed Offer Letter
- Foreign National Information Form
- If no Social Security Number, include the receipt from Social Security Administration
- I-94 Card (Arrival/Departure Record)
- Picture Visa – no VISA for Canada
- Unexpired Picture Passport – if extended, please include page that shows extension
- Immigration Document
  - I-20 for F-1 VISA
  - If on OPT, include page 3 showing the OPT dates
  - DS-2019 for J-1 VISA
  - I-797 for H-1 VISA
  - I-485 for Permanent Residency (application)
- Employment Authorization Card (EAC) Card, if applicable
  - Student on OPT
  - Pending Permanent Residency
  - J-2, M-1 may work with EAD Card

Click here for a Non-Resident Alien Hiring Process Flowchart
Since the initial project announcement in the December 2011 issue of The Bottom Line, the Travel & Expense Management (TEM) team has been working with the vendor, Concur, to configure online expense management for the Penn environment. Our work has been guided by the School and Center representatives who agreed to serve on our advisory group. The group has met several times to review the initial system configuration, validate the hierarchy, and provide input on unique School/Center requirements. They have been invaluable partners on this project.

Following is a list of advisory group members.

<table>
<thead>
<tr>
<th>Department</th>
<th>Members</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annenberg Public Policy Center</td>
<td>Lena Buford</td>
</tr>
<tr>
<td>Annenberg School for Communication</td>
<td>Donna Edwards</td>
</tr>
<tr>
<td>Athletics</td>
<td>Larry Boggs</td>
</tr>
<tr>
<td>Business Services</td>
<td>Katie Carlin, Joy Rogers Gomez-Farrow, Wilma Smith</td>
</tr>
<tr>
<td>Campus Services</td>
<td>Rovena Pando</td>
</tr>
<tr>
<td>College Houses &amp; Academic Services</td>
<td>Rosalind Carter</td>
</tr>
<tr>
<td>Dental Medicine</td>
<td>Ceil McDermott, Sophie Dubil</td>
</tr>
<tr>
<td>Design</td>
<td>Christine Williams</td>
</tr>
<tr>
<td>Development</td>
<td>Patricia Speakman, Maria Reyes</td>
</tr>
<tr>
<td>EVP</td>
<td>Donna Morris</td>
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<tr>
<td>FRES</td>
<td>Karen Di Maria</td>
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<tr>
<td>GSE</td>
<td>Amira Arslic</td>
</tr>
<tr>
<td>ISC</td>
<td>Darlene Dziomba</td>
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<tr>
<td>Law School</td>
<td>Michelle Werner</td>
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<tr>
<td>Museum</td>
<td>Matt MacGregor</td>
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<tr>
<td>Nursing</td>
<td>Jackie Lowry</td>
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<tr>
<td>OACP</td>
<td>Frank Tresnan</td>
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<tr>
<td>OIP</td>
<td>Rose Flynn</td>
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<tr>
<td>President</td>
<td>Janet Dwyer</td>
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<tr>
<td>Provost</td>
<td>Gearline Robinson-Hall</td>
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<tr>
<td>PSOM</td>
<td>Jason Nestor</td>
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<tr>
<td>Research Services</td>
<td>Todd Swavely</td>
</tr>
<tr>
<td>SAS</td>
<td>Karen Bergbauer, Deb Sokalczuk</td>
</tr>
<tr>
<td>SEAS</td>
<td>Donald Sokalczuk</td>
</tr>
<tr>
<td>Social Policy and Practice</td>
<td>Raynel Otero</td>
</tr>
<tr>
<td>Vet</td>
<td>Joseph Nace</td>
</tr>
<tr>
<td>VPUL</td>
<td>Lynn Moller</td>
</tr>
<tr>
<td>Wharton</td>
<td>Sam Frenkel, Maureen McGinness</td>
</tr>
</tbody>
</table>

We encourage you to use your representative on the advisory group as a resource should you have questions about the TEM project. You can also address questions to the project team at ASKTEM@LISTS.UPENN.EDU.
More Search Capabilities for Shopping Carts in the Penn Marketplace

With the next upgrade of the Penn Marketplace effective, Monday, March 27, 2012 you will be able to search for your carts in a new way. The “History” tab will now be called “Document Search” providing end users a way to quickly locate shopping carts, save repeated searches, and export the search results. All history searches will now be performed under Document Search.

With Document Search, filter options are available after performing your initial search. These are called Post-Search filters and allow users to define additional criteria for the search results.

There are two ways to use Document Search: Simple Search and Advanced Search. These are similar concepts to the current product search functionality.

The new search capabilities include searching by:

- **User Information** – Search for any cart by the user name, user’s first name, user’s last name, or user’s email address.
- **Commodity Code** – The commodity code may be keyed into the simple search box to search for all documents that contain that commodity code.
- **Product Flags** – Product flags are provided by suppliers to indicate characteristics such as hazardous, green items, radioactive items, and more. With 12.1, you can search for documents by these product flags.

**Additional Search Options:**

Another new search option that will make searching easier is the “remember my last search” feature.

Lastly, you will have the ability to change your search term(s) on the search results page. For example, if you searched for water cooler and after reviewing your results you want to search for heated water cooler, you can change that search term on the search results page without having to do a new search. This allows users to easily change their search while maintaining any post-search filters selected.

*For additional information please contact: mktplace@upenn.edu*

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**Travel Advisory**

**New Mileage Reimbursement Rate for 2012**

<table>
<thead>
<tr>
<th>Effective Date</th>
<th>Effective To</th>
<th>Standard Mileage</th>
<th>Moving Expenses Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan 1, 2012</td>
<td>Jun 30, 2012</td>
<td>55.5¢ per mile</td>
<td>23¢ per mile</td>
</tr>
<tr>
<td>Jul 1, 2011</td>
<td>Dec 31, 2011</td>
<td>55.5¢ per mile</td>
<td>23.5¢ per mile</td>
</tr>
<tr>
<td>Jan 1, 2011</td>
<td>Jun 30, 2011</td>
<td>51¢ per mile</td>
<td>19¢ per mile</td>
</tr>
<tr>
<td>Jan 1, 2010</td>
<td>Dec 31, 2010</td>
<td>50¢ per mile</td>
<td>16.5¢ per mile</td>
</tr>
</tbody>
</table>

The mileage reimbursement rate for moving and relocation expenses will be 23 cents per mile. For more information go to the website below: [http://www.purchasing.upenn.edu/travelSite/travel/before-you-travel/car/mileage-reimbursement/](http://www.purchasing.upenn.edu/travelSite/travel/before-you-travel/car/mileage-reimbursement/)

*Continued on the page 6*
Reminder! University Faculty and Staff can Shop the Penn Marketplace Using Their PennKey and Password i.e. NO TRAINING REQUIRED!

As of July, 2011, Penn faculty and staff, who do not have BEN Buys responsibility, are able to directly access the Penn Marketplace for their purchasing needs. While training is not required to access the Penn Marketplace, purchasing activity must be conducted in accordance with Penn’s Purchasing Policies. To access the Penn Marketplace, Shoppers will authenticate via PennKey and Password by clicking on the Penn Marketplace-For Shopper Only logo found on the Purchasing website and on www.upenn.edu/u@penn.

In the Penn Marketplace, Shoppers are able to view Penn specific pricing with real time product availability, add their selected items to a cart, and assign the cart to a person (Assignee) who must be a BEN Buys Requisitioner or PO Manager. Upon notification via email, the Assignee ‘picks up’ the Shopper’s cart in the Penn Marketplace for processing through BEN Buys.

Consult your business office for the utilization of the Shopper feature to assure that you are meeting the business requirements of your department.

ISC Service Helps Penn Go Green!

Think about this – A sample of 800 computers at Penn are actively used only 13% of the time, or on average 3 hours/day. Most of the remainder of the time (77% or averaging 18 hours/day), they are sitting idle – fully powered on, just waiting to be put to use. Equate this to leaving the lights on in your house while you’re at work or home sleeping, or the water running in case we want to wash our hands. Most of us won’t do this, but will leave the computer on, just in case we want to use it.

Compare this to computers consciously put into a green savings mode by departments at Penn. A similar sample of 800 computers spends the same average of 3 hours/day active, but the idle time is reduced from 77% to 17%. The remaining time is spent either off, or in a standby mode (using only slightly more power than off).

While the two sets of computers are actively used the same amount of time, the energy consumption and the energy cost of the green group is about 1/3 that of the first group.

How did we do it? The ISC Desktop Power Management initiative aims to reduce power consumption by desktop computers at Penn, doing so by utilizing the Tivoli/BigFix desktop management service to set and monitor power settings and consumption. Desktop computers are set to turn monitors off after 20 minutes of inactivity (moving the mouse will wake the monitor). The computer itself is set to go into standby mode after a period of inactivity. While standby mode uses only 1 watt more energy than fully off, the computer will resume where you left off with mouse or keyboard activity. These settings also take advantage of time that you’ve stepped away from your computer (e.g., for meetings or lunch) to save energy.

The largest benefit is found by reducing power draw for evenings and weekends. Many faculty and staff will occasionally use a home machine to remote to their work desktop to use resources in the office. In these cases, the office machines are left always on just in case they are needed. ISC was able to take advantage of Tivoli/BigFix with a web page (www.upenn.edu/wakeup) which allows one to wake a desktop from off or standby mode only when needed. After a period of inactivity, the computer will resume standby mode and significantly reduce the energy consumption of the desktop.

ISC was awarded a Penn Green Fund Grant to promote desktop power management using Tivoli/BigFix. Participating departments may receive a rebate on the monthly service fee for one year for each machine participating with greener power management settings. Local Support Providers (LSP’s) also benefit from other, non-power related desktop management features of the Tivoli/BigFix service, such as remote software and security patch installation, to provide more efficient computing support. Long-term, departments will also realize a savings in energy fees through a significant reduction in desktop energy consumption. Most of all, participating departments are helping to meet Penn’s goal to cut its campus energy use by 17 percent by 2014.

If you are interested in learning about what desktop energy management options are already in place in your department, please contact your Local Support Provider (LSP). For more information regarding ISC’s Desktop Management Service LSP’s can contact ISC Technology Support Services at onsite-help@isc.upenn.edu or 898-1781.
The most recent notice of salary limitations on grants, cooperative agreements and contracts was recently published and distributed (http://grants.nih.gov/grants/guide/notice-files/NOT-OD-12-035.html).

As stated in the notice, any grants awarded in previous fiscal years (e.g. FY2011, FY2010, etc.) are not impacted by the FY2012 salary limitation. Carrying over previous years’ funds to support salaries will remain at the salary limitation levels in effect at the time those awards were issued.

Awards that require sponsor approval for carryover will continue to be set up under the current procedure. If carryover funds will be used to pay salaries, departments must determine the amount available based on limitations in effect at the time the funds were awarded and should be inclusive of benefits and F&A. Departments will be responsible for monitoring the salary expended on the carryover funds to ensure compliance.

Awards that do not require sponsor approval for carryover will continue to retain the same fund account number throughout the competing segment. Departments must review the grants at the end of the budget period to determine the amount that will be carried over and expended in the continuation year. If carryover funds will be used to pay salaries, departments will be responsible for monitoring the salary expended on the carryover funds as well as salary expended on the current year fund to ensure compliance with previous and current year limitations.

Departments may request a sub-account be set up for the carryover if this would facilitate the management of the award.

If you have any questions, please contact your ORS representative.

ORS Contacts
http://www.upenn.edu/researchservices/contact.html

Penn’s annual Benefits Open Enrollment period is drawing near and your current address must be updated by March 19, 2012. Penn mails your Open Enrollment information to your current address, and if your current address is not up to date in the payroll system, your Open Enrollment information may be delayed or even lost. Correct address information is important to ensure a smooth process; for instance, availability of some benefit plans may vary by zip code.

Please Note: If you have no current address on file in the payroll system, Open Enrollment information will be sent to your permanent address.

To view and/or change your address information, go to the U@Penn website at http://www.upenn.edu/u@penn or contact your Business Administrator.

Again, your current address must be updated no later than March 19, 2012.
On February 1, 2012, the Office of the Vice Provost for Research (OVPR) in partnership with the Division of Information Systems and Computing officially launched FIDES, a web-based application to facilitate the disclosure of financial interests and relationships related to participation in specific research projects. Persons who have not previously disclosed to the OVPR financial interests related to a specific research proposal or IRB protocol must now do so in FIDES at https://fides.isc-seo.upenn.edu/. Once a person has disclosed in FIDES, any changes in financial interests should also be reported in FIDES. **Paper disclosures are no longer being accepted by the OVPR.**

The requirement to disclose financial interests related to research in FIDES is separate and distinct from required, school-based annual extramural activities reporting.

There have been a number of inquiries related to when a disclosure in FIDES is required.

**Q.** Is a disclosure required in FIDES, even if the Investigator has no personal financial interests related to a specific research project?

**A.** No. FIDES does not change or add any new disclosure obligations. If an investigator does not have a personal financial interest that is relevant to research that s/he is conducting, no disclosure is required.

**Q.** If an Investigator previously submitted a Confidential Financial Disclosure Statement (paper form) for a specific research proposal or IRB protocol, does s/he now have to submit a new disclosure in FIDES, including to report updated financial information relevant to that same research?

**A.** If there has been no change in the Investigator’s financial interests with respect to that research project, there is no need to submit an update in FIDES. However, changes in financial information must still be provided to OVPR. Persons who previously submitted disclosures before February 1, 2012 should email the Office of the Vice Provost for Research to report any changes in financial interests.

**Q.** How can an Investigator identify the specific research project that is the subject of his/her disclosure?

**A.** It is important for the correct research project to be identified in FIDES. The first questions in FIDES ask the Investigator to identify the IRB protocol and/or proposal in drop down lists (as applicable). If the project involves both a protocol and a proposal (e.g. grant, clinical trial agreement etc.), it is helpful for the Investigator to have on hand the titles and IRB / Institution numbers as they appear in PennERA in order to identify them in the drop down lists. If any title is not listed, the Investigator is given the opportunity to write in the information.

OVPR staff will be happy to provide individual guidance to any individual required to disclose in FIDES. Individuals who wish to receive this individual instruction should contact the OVPR office.

For additional information, please visit the OVPR website at [http://www.upenn.edu/research/](http://www.upenn.edu/research/) or contact the OVPR at 215-898-3603 or email at coi@exchange.upenn.edu

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**The Bottom Line**

March 11th

**2:00 a.m.**

*Spring forward!*
How to Handle 'Rejected' Purchase Orders?

**BEN Knows**

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

- How do I correct a PO that has been rejected back to the Buyer with a change required other than to the original GL account code combination?
  - From either the Requisitioner or PO Manager Responsibility
  - Select Notifications
  - Click on the PO that has been rejected
  - Read the ‘Note’ under Approval History for the rejection reason
  - Click on Open Document
  - Navigate to the appropriate place in the PO
  - Make the correction(s)
  - Click on Tools>Check Funds
  - Click on [Approve]
  - Include a ‘Note’ to the Approver if desired
  - Click [OK]

- For detailed instructions on how to correct a PO that has been rejected back to the Buyer and a change is required to the original GL account code combination OR the rejected PO is no longer needed, click below:
  http://www.finance.upenn.edu/benknows/browse_topics/po_rejected.shtml

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**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 training@exchange.upenn.edu no later than May 4, 2012.

The Winner will receive a one year Faculty Club Membership

1. What is the Penn eForms link and ‘go live’ date?
2. What is the last day to update your address for Open Enrollment 2012? What is important to be sure to update?
3. Describe a ‘Shopper’ in one sentence?
4. What is the standard mileage rate for 2012?
5. On the Non-Resident Alien (NRA) Hiring Officer Flowchart, what is needed before the NRA can go to Payroll Tax?

**Last Quarter’s Winner:**
Denise Scala, CRA
Senior Grants Manager
Office of Nursing Research
Congratulations!

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**Did You Know…**

...From the Payroll/Personnel (UMIS) Function Menu, under 02 Inquiry>01 Personnel Menu>025 Time Balances, you can see the balances for a weekly paid salaried employee, which includes:

- **SIC1** = Current year sick time
- **SIC2** = Prior year sick time
- **SIC3** = Short Term Disability (STD)

For example: If you have accrued 10 sick days by the end of the fiscal year, half of these days are added to your STD balance up to a maximum of 42 days.

- 12 Annual sick days eligible
- -2 Sick days taken during the FY
- 10/2 = 5 days moved to STD