New Sponsored Projects Billing & Receivables Functionality Coming to BEN Financials

This spring, new sponsored projects billing and receivables functionality will be added to BEN Financials. BEN Billing and Receivables will link PennERA with BEN Financials, and will replace Penn’s current Billing and Receivables Information Management (BRIM) system, which is used by the Office of Research Services (ORS) to issue invoices and track receivables for sponsored projects.

Key Features and Benefits

BEN Billing and Receivables will streamline and improve invoice creation and billing, reconciliation, and collections. The new functionality will reduce the number of shadow processes and duplicative data entry, as well as reduce overall processing time. There will be automatic notifications and logging of collection activities, better tracking and processing of outstanding receivables, and more system flexibility to meet sponsors’ evolving requirements. There is also the capability to handle other University receivables processing (non-grant related).

BEN Billing and Receivables Modules

The new BEN Billing and Receivables modules will be accessed through BEN Financials by authorized users:

- Grants & Projects – Used for invoice generation, overhead and revenue recognition, and award and project tracking
- Accounts Receivable – Used for customer setup, processing cash receipts, collections, reporting, and processing receivables transactions

Space@Penn Upgrade Coming Soon!

A project is underway to upgrade the current version of the application the University uses to collect space inventory data. This application provides data to the Space@Penn collection in the Data Warehouse. It also interfaces with the Web Updater tool that allows designated users in the field to update certain elements of their space.

This project, whose Executive Sponsors are Anne Papageorge, David Hollenberg and Marilyn Jost at Facilities and Real Estate Services, is currently in the implementation phase with an expected production date in the fourth quarter of FY14.

Analysis of the new version was conducted from both a functional and technical standpoint in order to ensure we could replicate the Web Updater functionality and recreate data extracts needed to provide a seamless transition of data feeds to the Data Warehouse and other downstream systems.

Earlier this month, the team invited a small number of Web Updater users to preview the new tool with us.

Users and Super users will be provided training through the Financial Training Department. We will update you in March with more detailed information regarding training dates and our anticipated production ‘go live’ date.

Our goal is to provide a seamless transition without interruption in availability of space data in the Data Warehouse.

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Additional Newsletters
Office of Research Services
http://www.upenn.edu/researchservices/newsletter.html

Prior Issues of The Bottom Line
http://www.finance.upenn.edu/ftd/bline.shtml
**Attention PO Managers**

The BEN Pays Imaging upgrade (MarkView) was successfully implemented in December 2013. To access the upgraded web application please use the following URL:

https://benfprd1-isc-seo.upenn.edu/markview/mvt_mv_home.home

If you had the Web Inbox bookmarked please replace it with the new URL. As a reminder, if you have an invoice on hold, you receive a daily e-mail notification with the URL included.

**BEN Pays Functionality**

The upgraded application introduces a new viewer and some other minor changes. Highlights include:

- ‘Markups’ are now called ‘Actions’ and they no longer appear on the image. The actions are available in a list next to the image accessed by clicking on ‘Action History’ (see Viewer Settings).
- Ability to personalize the viewer to your specifications and retain those settings each time you access the application (i.e. default zoom, toolbar settings, Action History, etc.).
- Some of the ‘Actions’ have changed names:
  - Holds Resolved is now Resolve Holds
  - Comment Request is now Request Comment

**Important Viewer Settings**

As a result of the viewer changes it is important that you enable a few settings to allow you to see the invoice actions and to scroll on the image.

- **Action History** – Click the ‘Action History’ icon to display the previous activities performed on the invoice.
- **Page Overview** – Click the ‘Page Overview’ icon to allow for scrolling to the see the entire image. (Tip: This is very helpful navigating through the image).

**Documentation**

The Financial Training Department’s BEN Pays documentation has been updated to include the changes in the application. Please refer to the BEN Pays Invoice Imaging Quick Reference Guide or the BEN Pays User Guide.

**Questions**

Please direct any questions about the BEN Pays Imaging application to BEN Helps.

- Enter a ticket in the online support application - http://BENHelps.finance.upenn.edu
- Phone – 6-HELP (215-746-4357)

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International Student and Scholar Services (ISSS) is Pleased to Offer the Following Workshops in Spring 2014:

- **H-1B Specialty Worker Workshop**
  3/6/2014 (9:30 – 11:30a.m.)

- **J-1 Scholar Workshop**
  3/13/2014 (1 p.m. – 3 p.m.)

- **Special Handling Labor Certification for Teaching Faculty Workshop (for permanent residency)**
  3/14/2014 (1p.m. – 3 p.m.)

- **Standard Labor Certification Application Workshop (for permanent residency)**
  4/3/2014 (9:30 – 11a.m.)

  Register at http://global.upenn.edu/isss/departmentworkshops.
  All workshops will be held in our Conference Room, 3701 Chestnut Street, Suite 1W.
  We hope to see you there!
PennWorks Enhancement for Temporary SS#’s

To comply with Federal regulations, a change will be made soon to the Penn Works application requiring additional information to be entered when hiring or rehiring faculty and staff who do not have a valid government issued Social Security Number.

The Penn Works application will prompt you to add the employee’s Passport Identification Number and Country Code.

Please note: This requirement only pertains to individuals with a temporary (e.g. 999-) Social Security Number.

Any questions, please contact https://www.hr.upenn.edu/contact/online or the payroll helpdesk at payroll@exchange.upenn.edu.

Important 2013 W-2 Form Information

For 2013 and beyond, ADP W-2 Services is now available.

Services Available:
1. Access W-2 form information for tax years 2013 and later
2. Opt out of printing W-2 form (must elect by 12/31)
3. Receive email notification when a new statement is available to view (must enter email address into ADP)
4. Upload W-2 form information directly into tax software
5. Online help and FAQs

To Access:
1. Login to ADP W-2 Services from the following U@Penn secure web site: https://medley.isc-seo.upenn.edu/penn_portal/u@penn.php
2. In the My Pay section, click on “My Tax Info” (enter additional security information)
3. Click on "Click here for W-2 information for tax years 2013 and later”

If there are any problems, please access the online help on the ADP W-2 Services website or contact the Tax Office at Tax@exhange.upenn.edu or 215-898-6291.

Please note that W2 forms for 2012 and prior will still be accessible under “My Tax Info”
Applicant Tracking System Upgrade: University of Pennsylvania’s Job Site

As you may know, on January 8, 2014, the University of Pennsylvania upgraded to the newest version of the PeopleAdmin online jobs site for staff. This allows us to leverage PeopleAdmin’s state-of-the-art technology, designed specifically for recruitment in the higher education sector. The new system is still found at https://jobs.hr.upenn.edu and is still branded Jobs@Penn.

The upgrade helps us to gain even more efficiencies in our hiring processes as we recruit the best internal and external talent for staff positions. The enhanced system offers many benefits, including:

- An integrated approach for managing positions and job requisitions
- User accounts integrated with PennKey, no need for guest user accounts
- Reduced time to approve, process, and hire candidates
- An easy-to-use and interactive web portal-like interface
- Greater and easier direct communication with applicants
- Simple searches and ad-hoc reporting
- The ability to view all open jobs with one login
- A less paper-intensive process

It is important to note that when we upgraded, existing job and applicant data was not converted over to the new system. Because of this, we will be running the old and new systems concurrently for some time. The URL for the current system will change. Visit the Hiring Officer Resources page on the Human Resources website at www.hr.upenn.edu/hiring for complete details on the change. You’ll find the following:

- Instructions for accessing both the old and new versions of the Applicant Tracking System.
- Training and reference materials for the Applicant Tracking System, including an online training module designed specifically for Applicant Reviewers /Hiring Officers.

Penn’s Benefits Open Enrollment
Confirm Current Address

Penn’s annual Benefits Open Enrollment period is drawing near and your current address must be updated by March 14, 2014. 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 14, 2014.
The Sound of Savings

Tuesday, March 25, 2014
10 a.m. to 2 p.m.

Purchasing Services
2014 Supplier Show

Annenberg Center for the Performing Arts
3680 Walnut Street

Spring Supplier Show
Commodities Include:
- Office Supplies
- Print and Design
- Computers
- AV
- Travel Related Suppliers
- Computer Peripherals
- Furniture
- Stationery

Don’t forget to bring your PENN ID to be eligible to win!

Penn Purchasing Services

LIVE MUSIC • DOOR PRIZES • REFRESHMENTS • SUPPLIER SAMPLES
Dear Colleagues:

I am writing to remind the Penn research community that proposal submissions are due to the Office of Research Services three (3) business days prior to the sponsor submission deadline. I am also writing to clarify that federal agencies have NOT been extending submission deadlines as a result of weather events, such as snow storms, even when federal offices in the Washington DC area have been closed as a result of such events. In the event of suspension of normal operations at Penn, the PennERA team and the pre-award group continue to monitor email and be available to assist with questions and issues related to grant submission.

The three day period allows ORS to conduct review of the proposal for technical errors as well as compliance with the sponsor guidelines. While we make every effort to support all submissions regardless of when they are received, when we receive a proposal only an hour or two (or even a few minutes) before it is due to the sponsor, there is not adequate time to review. This may result in either the proposal not compiling properly in PennERA, in which case it will not submit to grants.gov, in the proposal being rejected by grants.gov with no time to review errors and resubmit, or in the submission rejected by grants.gov because it is not received prior to the deadline.

We have had a recent spate of proposal submission failures. In each case, the proposal was submitted to ORS on the day, hour or minute of the sponsor deadline and was rejected by grants.gov. Funding agencies are taking an increasingly hard line that failure to start the submission process in a timely manner or attempts to submit a proposal with errors are not issues that permit waiver of the deadline.

If you are working on a proposal and will not be able to meet the 3 day prior to deadline ORS submission requirement, it is imperative that you communicate with ORS regarding your submission. If you will not be finalizing your submission to ORS at least 24 hours prior to the sponsor deadline, we ask that you notify your pre-award contact in writing, copying the Director of Pre-Award, Heather Lewis (heatherl@upenn.edu). If you are submitting to a deadline that is outside normal business hours (e.g. midnight) and will not be finalizing the proposal until the day of submission after 3 pm, please notify me in writing at least 24 hours prior to the submission deadline. This will permit ORS to coordinate availability of staff to submit the proposal after hours. It is important to note that such afterhours submission will not receive additional review after the close of normal business hours.

I appreciate the tremendous effort involved in writing a research proposal. If you are submitting to an agency or program that you are not familiar with or are submitting a complex proposal with many sub recipients, please reach out to ORS early in the process, as we are happy to help with the proposal preparation process. Please help us help you by allowing adequate time for submission!

Thank you,

Missy
Elizabeth Peloso
Associate Vice President/Associate Vice Provost
Office of Research Services
University of Pennsylvania
Phone: 215-746-0234
epeloso@upenn.edu
http://www.upenn.edu/researchservices/
Course Name- Sponsored Projects at Penn

Who Should Register- Individuals who assist faculty with the preparation of proposals requiring the individual to make determinations of allowability, allocability, and reasonableness in accordance with sponsor guidelines, federal regulations, and University and School-Center policies-procedures and regulatory requirements, review and approve expenditures at the central level, provide counsel and advice to faculty regarding cost transfers, effort reporting or overall award management, are responsible for the monitoring of awards, reviewing financial reports for accuracy and compliance and assuring that charges are allowable, properly allocated and reasonable.

Course Description- Sponsored Programs at Penn has been designed to provide a comprehensive introduction to the basic knowledge required to effectively prepare proposals for submission to external sponsors and to monitor and manage grant funds at Penn.

The course is divided into the following three half-day sessions, which includes:

- Introduction to Sponsored Project Administration
  - Proposal Preparation and Processing
  - Award Acceptance and Account Set-up
  - Post Award Management
- Closeout and Audits of Sponsored Project Funds

Prerequisite- Attendees must complete the following on-line tutorials prior to attending the SP at Penn class- You will not be able to register for the course until these 3 are completed. To receive the certification you will need to complete the balance of online quizzes.

- SPCCP- Policies Related to Sponsored Projects Policies
  - SPCCP- Allowability of Costs
  - SPCCP- Effort Reporting

Please note: We will also offer this course in May 2014 and August 2014.

To register for the Prerequisites and the Sponsored Projects at Penn go to:
http://knowledgelink.upenn.edu/

Please search under title of course in the catalog located on your home page in Knowledge Link
Any questions or concerns please contact Tina Nemetz at tnemetz@upenn.edu
The National Institutes of Health has provided notice (http://grants.nih.gov/grants/guide/notice-files/NOT-OD-14-043.html) on January 16, 2014 that by Executive Order 13655, signed December 23, 2013, the federal Executive Level II salary is increasing from $179,700 to $181,500. The NIH salary cap is currently tied to Executive Level II. The new salary was effective January 12, 2014.

In PennERA Proposal Development, all Personnel salary information entered beginning immediately will automatically calculate the requested salary and fringe benefits (as shown on the F&A and Cost Sharing tabs) based on this new value, as well as the F&A and the unallowable portion in excess of the cap. However, for Proposals not yet submitted, any person whose information had been entered prior to January 20th, users must follow the steps below to cause the recalculation to occur:

1. Click the open icon for any personnel whose salary is equal to or greater than $181,500.
2. If you entered the old cap ($179,700), rather than full institutional salary base, change this value to $181,500 and Save.
3. If you entered full institutional salary base, simply Save the screen again.
4. NOTE: It isn’t necessary to enter the ‘Edit Details’ screen to force the recalculation. PD will allow users to save in the first screen you enter for each person affected by this change.

Please send any questions to: PennERAhelp@lists.upenn.edu

Please be sure to let us know if you believe the calculations are not correct.

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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 2, 2014

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

1. What are the ERN Type, Object Code and Job Class Code for a Summer Work-Study-In Class?
2. What is the last day to update your address for Open Enrollment 2014?
3. What is the date of the Purchasing Supplier Show?
4. What is the NIH Salary Cap increase amount?
5. What are the three pre-requisites for attending Sponsored Projects at Penn?

Last Quarter’s Winner:
Cathy Bucher, Business Administrator
Biddle Law Library

The Bottom Line  March 2014
The latest upgrade to PennERA is complete. Although there are changes you may not notice, some notable changes include:

- Improvement to eForm functionality, including now prominently showing the status of “completing” and a warning message if a user tries to exit before the form is saved.

- Enhancement to the Review Dashboard for approvers – the “My Decision” field has been relocated to a more convenient and visible location, as well as enhanced messages to approvers as they are about to complete review of an item.

- Modular Budget – A modular budget balancing transaction will be created in Proposal Tracking to reconcile any difference between the detailed budget entered and the modular budget request.

- The NIH Salary Cap has been increased in the Proposal Development budget tool

As always, please send any questions to PennERAhelp@lists.upenn.edu

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Affected Users

BEN Billing and Receivables will only be used by staff in the Office of Research Services (ORS) and the Office of Research Support Services (ORSS) involved in sponsored projects billing, receivables, and collections-related operations. Training on the new functionality will be provided for these users.

Users of the current Data Warehouse BRIM collection will automatically be given access to the new Grants/Receivables data collection in the Data Warehouse.

An effort was made to minimize impact on current BEN Financials users with the introduction of the new modules. There will be minor changes to reports, and BEN Financials users will receive direct communications about these changes.

Questions

This project is jointly sponsored by the Division of Finance, the Provost’s Office, and Information Systems and Computing. Please address any questions about the project to the project team at BillingAR@lists.upenn.edu.

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Ruth L. Kirschstein National Research Service Award (NRSA) Stipends, Tuition/Fees & Other Budgetary Levels Effective for FY14

Please see the link to the notice regarding the increase in stipend levels. This notice, NOT-OD-12-033, issued by NIH, AHRQ and HRSA, establishes stipend levels for fiscal year (FY) 2014 Kirschstein-NRSA awards for undergraduate, predoctoral, and postdoctoral trainees and fellows.

The budgetary categories described in this Notice apply only to Kirschstein-NRSA awards made with FY 2014 funds. All FY 2014 awards previously issued using FY 2012 stipend levels will be revised to adjust stipends to the FY 2014 level. Appointments to institutional training grants that have already been awarded in FY 2014 must be amended to reflect the FY 2014 stipend levels once the training grant award has been adjusted by the NIH. Amended appointments must be submitted through xTrain in the eRA Commons. Retroactive adjustments or supplementation of stipends or other budgetary categories with Kirschstein-NRSA funds for an award made prior to October 1, 2013 are not permitted.


Feel free to contact your ORS Post Award representative if you have any questions about this notice.
BEN Buys FastFact:
The creator of a PO is always the Buyer. The process of transferring the requisition from the person requesting it to the queue of a PO Manager “creates” the PO. The person creating a requisition is the Requisitioner or Requestor. The person approving the requisition is the Buyer.

BEN Buys FastFact:
If an account number is incorrect on a purchase order that has already been approved, you must create an adjustment to previous transaction journal entry and charge the correct distribution (account number) after the purchase order has been invoiced.

BEN Buys FastFact:
All purchases equal to or greater than $5,000.00, with the exception of purchases from Penn Marketplace suppliers, require competitive bids. Three supplier bids generally satisfy the University’s competitive bidding requirement. A formal “Bid Waiver” is required when selecting a supplier other than the low bidder or if obtaining competitive bids is not feasible or is not in the best interest of the University. A purchase requirement greater than $4,999.99 cannot be split over several purchase orders, in an attempt to bypass the University’s competitive bidding requirement.

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**Did You Know...**

...the Earnings Types, Object and Job Class Codes for Student Workers at Penn? See the grid below.

<table>
<thead>
<tr>
<th>Student Worker A – In Class</th>
<th>Student Worker B – Not in Class</th>
</tr>
</thead>
<tbody>
<tr>
<td>ERN Type: SW1</td>
<td>ERN Type: SW2</td>
</tr>
<tr>
<td>Object Code: 5134</td>
<td>Object Code: 5134</td>
</tr>
<tr>
<td>Job Class Code: 599070</td>
<td>Job Class Code: 599071</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Academic Year Work-Study – In Class</th>
<th>Academic Year Work-Study – International</th>
</tr>
</thead>
<tbody>
<tr>
<td>ERN Type: WSR</td>
<td>ERN Type: SW1</td>
</tr>
<tr>
<td>Object Code: 5139</td>
<td>Object Code: 5134</td>
</tr>
<tr>
<td>Job Class Code: 515370 (community service jobs)</td>
<td>Job Class Code: 599072</td>
</tr>
<tr>
<td></td>
<td>515374 (all other jobs)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Summer Work-Study – In Class</th>
<th>Summer Work-Study – Not In Class</th>
</tr>
</thead>
<tbody>
<tr>
<td>ERN Type: WSR</td>
<td>ERN Type: WS2</td>
</tr>
<tr>
<td>Object Code: 5139</td>
<td>Object Code: 5139</td>
</tr>
<tr>
<td>Job Class Code: 515375</td>
<td>Job Class Code: 515375</td>
</tr>
</tbody>
</table>

For more information on how to create a job, hiring students, employment procedures and frequently asked questions related to the Student Employment Management System, go to [http://www.sfs.upenn.edu/seo/faculty.html](http://www.sfs.upenn.edu/seo/faculty.html).