



The Bottom Line

INTRODUCING PENN PROFILER: IDENTIFYING YOUR SAFETY AND COMPLIANCE TRAINING NEEDS

The Office of the Vice Provost for Research in conjunction with the School of Medicine, The Division of Finance, and Information Systems and Computing, is pleased to introduce the soon to be available, Penn Profiler. Penn Profiler is the University's new web-based application that enables individuals to identify their safety and compliance training needs based on their academic activities and/or job responsibilities by completing a 5-10 minute online survey. This initiative is designed to increase awareness of and compliance with safety and regulatory requirements. Penn Profiler recently completed a pilot and is anticipated to be rolled out to the University Community early this Fall.

Penn Profiler leverages the University's enterprise-wide learning management system, *Knowledge Link*, and simplifies the training experience by clearly presenting faculty and staff with their required courses in one place – the "Required Training" page of *Knowledge Link*.

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New Wachovia Bank Opens at Penn

As of **September 4th**, PNC will no longer be cashing Penn's Payroll, Student Financial Services or Accounts Payable checks for non-PNC customers. **Wachovia Bank** opened its University City Financial Center on Monday, August 20, 2007.

The branch is located at **3431 Chestnut Street** & has extended hours to serve the Penn Community.
Hours are 9 am - 8 pm Monday-Friday & 9 am to 5 pm on Saturdays.
The Branch telephone number is **215-222-2139**.

ATTENTION ALL BEN FINANCIAL PO MANAGERS & REQUISITIONERS

As a next step to the BEN Assets implementation project, the Property Management Group (PMG), in collaboration with Purchasing Services and Information Systems and Computing (ISC), is introducing enhancements to the Internet Procurement (IP) Property Management Form within the BEN Financials Requisitioner responsibility in the **Fall 2007**.

As Requisitioners and PO Managers in the BEN Buys system, you play an important role ensuring the appropriate information is included in each and every requisition for University assets. As you know, additional information is required when creating a requisition for an asset: fields such as Location, Asset Category, Custodian and Tagging Contact are currently part of the BEN Buys requisition process and are manually re-entered into the Property Management System, the legacy system used to track, maintain and facilitate the inventory of the University's assets.

The following is a description of changes that will be effective with this release.

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ATTENTION ALL BEN FINANCIAL PO MANAGERS AND REQUISITIONERS

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Detailed instructions for entering this information will be circulated in advance of the rollout.

Expansion to the Object Codes that Trigger the Property Management Form

Currently, Property Management information (Location, Category, Tagging Contact, etc.) is captured only for moveable equipment (Object Codes 1830, 1831, 1832 and 1833). Effective with this release, attribute information will be required for an expanded group of assets. Purchases made for the following referenced items will require that Property Management attribute data be entered as part of the requisition:

Description	Object Codes
Moveable Equipment	1830-1833
Collectibles	1850-1852 New!
Equipment in Process	1834 New!
Internal Use Software	1835 New!

Location Field Validation

The Location field within the IP Property Management form will be modified to include a validation against Space@Penn data. The field will be formatted to accept Building, Floor and Room # (e.g., 0155-10-1001 = Franklin Building-10th Floor-Room 1001). The system will only accept a valid combination of these 3 concatenated segments.

IMPORTANT: The Requisitioner must know their space in order to complete the requisition to purchase a University Asset. Senior Business Administrators within each School and Center are provided with copies of the Floor Plans by Facilities and Real Estate Services. If the BLDG-Floor-Room is not known or not available in the list of values, the Requisitioners /PO Managers will be directed to contact their Senior Business Administrator in order to obtain the correct

Additional Newsletters

Executive Vice President's Office

<http://www.evp.upenn.edu/>

Office of Research Services

<http://www.upenn.edu/researchservices/newsletter.html>

designation for the space in which the asset will be located.

Property Item Category Code

The new list of Category Codes was introduced in Spring 2007. Below is the link of all the Categories and their associated useful lives, as they currently appear in BEN Buys:

<http://www.finance.upenn.edu/comptroller/accounting/property/propcodes.shtml>

Custodian & Tagging Contact Fields

The Custodian & Tagging Contact fields will be modified to allow validation against employee data. Only university employees will be eligible to be custodian and tagging contacts. These fields will display the full name and Penn ID. As before, these are required fields.

Custodian Phone Number

This information should be entered using the xxx-xxx-xxxx format. As before, this is a required field.

Tagging Contact Phone Number

This information should be entered using the xxx-xxx-xxxx format. As before, this is a required field.

Component of Existing Asset

This is a new field that will be added to alert the PMG that the item being ordered is related to a multiple component asset. Determine if the purchase being made is a component of an asset: if 'Yes' select 'Y'; if 'No' select 'N' (the default will be set to 'N'). This is a required field.

The development of this application is based on wide consultation involving individuals and focus groups from various Schools/Centers and reflects the collective knowledge and current training experiences of the Research Training Community, Human Resources, and Financial Training Department.

The pilot, begun the last week of April and completed in June, included representatives from:

0103 *Biology (SAS)*
0745 *Wharton Finance and Administration (Wharton)*
1301 *Bioengineering (SEAS)*
1302 *Chemical and Biomolecular Engineering (SEAS)*
1303 *Computer and Information Science (SEAS)*
1304 *Electrical and Systems Engineering (SEAS)*
1305 *Materials Science and Engineering (SEAS)*
1306 *Mechanical Engineering and Applied Mechanics (SEAS)*
1307 *Systems Engineering (SEAS)*
1311 *SEAS Office of the Dean (SEAS)*
1312 *Office of Budget and Administration (SEAS)*
1322 *Moore Business Offices (SEAS)*
1323 *Towne Business Office (SEAS)*
1324 *Biotechnology Program (SEAS)*
1326 *Materials Characterization Service Center (SEAS)*
1327 *Mechanical Testing Service Center (SEAS)*
2600 *University Museum*
4108 *Genetics (SOM)*
4119 *Pharmacology (SOM)*
4121 *Physiology (SOM)*
4623 *Gene Therapy*
7801 *Office of Audit, Compliance and Privacy*

8306 *University Laboratory Animal Resources*
8313 *Radiation Safety*
8315 *Environmental Health and Safety*
8319 *Vice Provost for Research*
8327 *Office of Regulatory Affairs*
8712 *Financial Training Department*
8760 *Office of Research Services*

We anticipate that the Penn Profiler will:

- Strengthen knowledge of appropriate best practices that will prepare individuals for safely conducting their job responsibilities
- Provide a user-friendly, web-based, self-service application to identify and assign, in a timely manner, task-appropriate safety and compliance training
- Provide the research and administrative communities with easily accessible tools to assign, manage, maintain, and report safety and research compliance training information
- Strengthen the University's ability to meet ever-changing federal and regulatory compliance requirements and demands for accountability

Additional updates to the Penn community about the Penn Profiler will be forthcoming as we finalize the roll out plan. If you have any questions, comments, or suggestions, please send an email to: PennProfiler@pobox.upenn.edu

Additional information can be found at: <http://www.upenn.edu/VPR/profiler/>

Dr. Steven J. Fluharty, Vice Provost for Research
Scott Douglass, Vice President, Finance and Treasurer
Chris Kops, Vice Dean for Administration and Finance, SOM
Robin H. Beck, Vice President, Information Systems and Computing

NEW AND IMPROVED VOICE MAIL SYSTEM TO DEBUT SOON

This fall, Information Systems & Computing (ISC) will replace the current voice mail system in use for almost 15 years. The current system (Octel), because of its age and the scarcity of parts and service, is very costly to maintain. With the new system, we will be better able to provide a high availability for voice mail using modern servers and networks. In addition, the new voice mail system will offer a few new features. On your traditional phone, you will be able to listen to deleted voice mail messages and resave them during the same session. Many of the new system prompts will also be similar to the ones you already know. Faculty and staff who elect to use PennNet Phone, ISC's new Voice over IP (VoIP) service, will be able to listen to voice mail messages via email and manage voice mail features wherever they have access to a web browser. The new system is part of ISC's initiative to provide the next generation of integrated communication services (data, voice, video, instant messaging) to the University community.

Dialing the New Voice Mail System

The new system will have no effect on the phone number used to access voice mail: users will continue to dial the 898-6423 number.

Additional Information

To prepare for the cutover to the new system, watch for more announcements about the new voice mail system in the coming weeks in University publications. In the meantime, if you have questions, please contact Michele Narcavage, Voice Services Project Leader, at narcavag@isc.upenn.edu. To learn more about the new voice mail system, go to the Voice web site at www.upenn.edu/computing/voice and click the link "New Voice Mail System Coming Fall 2007."

*-Robin Beck, Vice President,
Information Systems & Computing
-Michael Palladino, Associate Vice President,
Information Systems & Computing*

NEW GUIDANCE ON WEBSITE PRIVACY STATEMENTS

Thinking about updating your department's website for the new academic year, or simply wondering how you could move your site even closer to state-of-the-art? If so, your timing is perfect, because new guidance on website privacy statements is available on the Privacy Office website:

www.upenn.edu/privacy
Click under "What's New"

The guidance describes the value of posting privacy statements, as well as the need for caution about what is included in them. There is also a link to a template document that can help you as a starting point in drafting, or improving, a privacy statement. If you have any questions please contact the Privacy Office at 215-573-4492, or at privacy@pobox.upenn.edu.

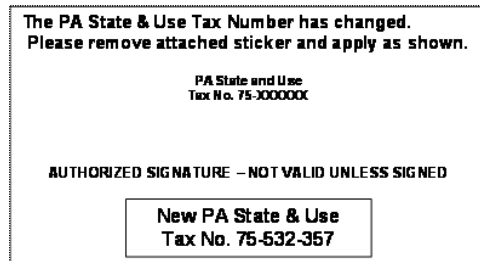
THE PENNSYLVANIA SALES & USE TAX NUMBER FOR THE UNIVERSITY OF PENNSYLVANIA HAS CHANGED

The University of Pennsylvania is exempt from Pennsylvania sales tax for most purchases directly related to the education and research mission of the University. Purchases not directly related to the mission are subject to Pennsylvania sales tax. Any business related purchase **not paid** by a **University check** or a **University Purchasing Card** is subject to **Pennsylvania sales tax**.

University of Pennsylvania Pennsylvania Sales Tax Number 75-532-357

The PA sales & use tax number is printed on the back of your card. You will receive a replacement sticker for your card. If you have any questions about the Sales & Use Tax, go to:

http://www.purchasing.upenn.edu/buyinfo/guide/tax_exempt.php



THE RESULTS ARE IN: P2P PROCESS ENHANCEMENTS ARE PAYING OFF!

The Procure-to-Pay (P2P) project team reached a number of important milestones in FY'07, and was able to actually track the impact of the P2P initiative on University purchasing by measuring certain key activities in the P2P business process.

FY'07 accomplishments:

- We introduced a consistent body of P2P process information, reference tools, and open communication channels in order to help foster awareness of, and adherence to, best practices and University purchasing policies. The P2P website, printed reference materials, and establishment of P2P champions, have helped to disseminate P2P guidelines and best practices, and to solicit feedback and recommendations from the field.
- By making P2P information ubiquitous and clarifying the business reasons, the “whys,” we have made our procurement and payment processes more transparent to all participants, including faculty, staff, and suppliers. Increased transparency allows greater focus on purchasing efficiency and new cost containment opportunities.
- We formalized performance metrics to guide P2P process improvements and reduce process exceptions, such as supplier payment percentage within terms, reduction of invoice holds, and reduction of invoice entry time. Schools and Centers have been successfully using the P2P reports at

<http://www.purchasing.upenn.edu/buytools/p2p.php> in order to monitor measurements and resolve and minimize process exceptions. Some of the highlights were:

Metric	2006	2007	Improvement
Suppliers paid within 30 day terms	59%	62%	3%
Invoice holds > 30 days	246	164	37%
P.O. invoices NOT entered within 30 days - monthly	3,315	2,627	21%
P.O. approval AFTER supplier invoice date – monthly	2,500	1,484	41%
C-form processing - monthly	6,840	6,808	1%

- We launched the School and Center “spend analysis” initiative; drilling down into local spending patterns and trends has already helped realize first-year savings of \$ 1.2 million!
- It is our intent to have all Schools and Centers share their P2P success stories, like the Office of the Provost, in an effort to foster P2P best practices across the University.

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BY THE NUMBERS: FY'07 P2P SUCCESS STORY

The Office of the Provost is one of the top performing Schools and Centers based on P2P measurement reports (<http://www.purchasing.upenn.edu/buytools/P2P-exception-reports-user-guide.php>) for FY'07. These reports measure a number of key procure-to-pay activities at each School and Center, with paying suppliers within terms being the key performance indicator.

Trevor Lewis, executive director of administrative affairs, credits Julie Shuttleworth (P2P champion) and Bill Turner and their team, for the overall performance improvements. “Julie and Bill have been instrumental in ensuring that all staff members and constituents are aware of, and adhere to, the University’s P2P policies and procedures by routinely reviewing purchasing activities and continually communicating P2P project messages and reminders out to the field.”

The benefits of improved performance “are felt immediately,” according to Trevor. “Relationships with suppliers are stronger because they are being paid on time. This in turn promises better pricing for our requisitioners. Ultimately this translates into greater budget flexibility. Many of our requisitioners operate with small budgets and low volume (e.g. student purchasers), making pricing the key lever in managing their finances.”

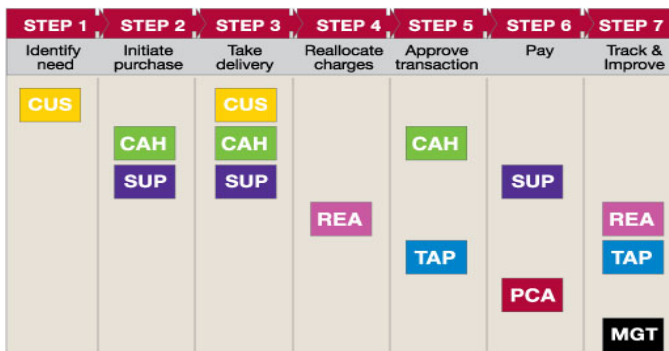
Trevor further credits active participation and support from the P2P team for building awareness of best practices at all levels of his organization, and for helping the Office of the Provost substantially improve its performance.

For more information on the P2P Project. see http://www.upenn.edu/b2b/b2b_project

FY'08 P2P GOALS AND OBJECTIVES

The performance metrics we deployed in FY'07 will continue to guide our process improvements and will spotlight specific areas in need of attention and clarification in FY'08.

- As part of our focus on communication and process transparency, we plan to add the completed purchasing card process outline to the P2P website in September (also see accompanying PaymentNet article). For simplicity, the information will be structured “step-wise,” in parallel to the previously released P.O. process information as shown here:



Customer (CUS), cardholder (CAH), supplier (SUP), reallocator (REA), transaction approver (TAP), purchasing card administrator (PCA), management (MGT)

- Similar process outlines will be developed for C-forms and T&E reimbursement, ultimately providing purchasers a complete guide and overview of all approved purchasing methods at the University.
- Relying on FY'07 results for guidance, we have set the following goals for P2P process improvements in FY'08 in order to raise supplier payment performance to 80% within

30 day terms, and to proactively manage the reduction of process exceptions for continuous process improvement:

- Clear invoice matching holds within 7 days
 - Drive supplier invoicing directly to A/P, and complete invoice entry within 15 days
 - Reduce “after-the-fact” purchase orders by 50% over FY'07
 - Push more transactions to P.O. or purchasing cards, thereby reducing C-form processing by 25% over FY'07
 - Reduce invoice rejections by 50% over FY'07
- We will also ramp-up our School and Center spend analysis to review all purchasing activity, such as P.O. spend, purchasing/fleet card spend, and travel and C-form spend. In addition, we will review and analyze buying patterns to help realize new purchasing efficiencies and savings at the local level.

For further information about the P2P initiative, visit http://www.upenn.edu/p2p/p2p_project , or contact:

Ralph Maier, Chief Procurement Officer, at maier@pobox.upenn.edu, or

Tom Slavinski, Associate Comptroller, at tslavins@pobox.upenn.edu.

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PURCHASING CARD PROGRAM AND NEW PAYMENTNET SYSTEM SUCCESSFULLY LAUNCHED

The PaymentNet Project Team extends a hearty “thank-you” to the entire University financial community for its assistance in refining and implementing the purchasing card program and the new PaymentNet system, designed to manage cardholder credit card purchases online.

Some Important Points to Remember

- As part of the improved purchasing card program, cardholders and transaction approvers can now view their statements online anytime in PaymentNet.
- Monthly statements of account are no longer e-mailed. Cardholders are able to run their own monthly statement of account.
- All cardholders are encouraged to enter any notes for their transactions via PaymentNet on a weekly basis and *prior to* printing their statements of account to avoid a more time-consuming manual process for recording the business purpose.
- Purchasing card transaction data is routinely available for the last 24 months.
- A link to the PaymentNet Quick Reference Guide is available on the purchasing web site at:

<http://www.purchasing.upenn.edu/buytools/card.php>

- All questions on the new purchasing card program and the PaymentNet system should be directed to the following email address:
pnet@pobox.upenn.edu
- For purchasing card cancellations, you must obtain and complete the required paperwork, which is available on the comptroller’s web site through the following link:
<http://www.finance.upenn.edu/comptroller/forms/>

Required Purchasing Card Training

Existing and prospective cardholders must complete the purchasing card training program and pass the accompanying quiz. For training requirements, please visit the purchasing card and PaymentNet FAQs section of the purchasing web site at:

<http://www.purchasing.upenn.edu/buytools/purchasing-card-and-paymentnet-faq.php>

To sign up for required purchasing card training, visit the web site at:

<http://knowledgelink.upenn.edu>

Suspension and Cancellation of Cards for Existing Cardholders

If you have not completed the purchasing card training program and successfully passed the accompanying quiz, your card is now suspended and you cannot use it. To prevent a complete cancellation of your purchasing card, you must complete the required training no later than September 30. After that date, any card that is still suspended will be cancelled completely. Once a card is cancelled, the cardholder must reapply for a new purchasing card.

How to Reactivate a Suspended Purchasing Card

Reinstatement of a suspended purchasing card requires a minimum of three business days after PaymentNet administration receives notification, and training and the quiz have been successfully completed. Additional information on reactivating purchasing cards is available in the FAQs at the following web site:

<http://www.purchasing.upenn.edu/buytools/purchasing-card-and-paymentnet-faq.php>



PENNERA: PROPOSAL DEVELOPMENT UPDATE

The PennERA (Electronic Research Administration) Proposal Development (PD) application has been in use since the application was released in October 2006 to a group of early adopters from select ORGs across campus. Several Schools have committed to use PD, including ORGs in SAS, SEAS, SOM, SON, Vet, and the Dental School. Since its release, additional ORGs from within these Schools have been added to use PD. The PennERA team continues to meet with School/Center Research Deans and Research Reps to develop PD transition plans for each School and Center, including scheduling orientation sessions for faculty. We'd like to encourage expanded use of PD to new users and organizations. For more information about using PD, contact pennera@pobox.upenn.edu.

Use of Proposal Development – NIH Mechanisms

Currently, Proposal Development can be used for NIH funding opportunities for the following proposal mechanisms:

R01	R21/R33
R03	R25
R13	R33
U13	R34
R13/U13	R36
R15	X01
R18/U18	X02
R21	S10

Use of Proposal Development remains voluntary for the supported mechanisms. The up-to-date list of proposal mechanisms for which PD can currently be used is available on the PennERA web site at:

http://project.pennera.upenn.edu/project/current_phase/PDfundingopps.pdf

New Reference Materials on PennERA Web Site

There are new reference materials available on the PennERA web site including:

- When to use PD – A list of proposal mechanisms for which PD can be used
- PD versus PureEdge – A chart that provides information on the key benefits of PD compared to PureEdge
- Routing & Approval paths – Documents that show the complete routing and approval paths for each ORG currently using PD
- Quick Reference Guides (QRGs) – Help guides for Investigators, Reviewers/Approvers, as well as a Proposal Development FAQ

These materials can be accessed from the left toolbar on the main PennERA page at:

<https://www.pennera.upenn.edu/>

Coming Soon

Activities under development include:

- Training – A revised PD training curriculum will be available in September for new and current administrative users. Two courses will be available, a basic course for new administrative users, and an advanced course with emphasis on budget development. Please check the [Knowledge Link](#) web site for available training dates and registration information at:

<http://knowledgelink.upenn.edu>

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PENNERA: PROPOSAL DEVELOPMENT UPDATE

Coming Soon

Continued from the previous page

- Generic Sponsor Form – A form that can be used when a sponsor does not have a specific form set. This form increases the potential sponsors for which PD can be used to submit proposals.
- Pipeline Report – A report that shows data for proposals created in PD that have been submitted for internal review. This report provides administrators and those on proposal routing paths with the list of proposals they have in progress and the status of these proposals.

There are two versions of the report:

- PD Pipeline Report – Shows all proposals for which a user is in the routing path or proposals a user can access within PennERA
- PD Grants.gov Report – Shows all proposals currently being submitted to Grants.gov or proposals that have been submitted to Grants.gov within the last 14 days

Proposal Development Help Available

Help information about Proposal Development is available on the PennERA web site:

- Advisories—For important information about the Proposal Development application, please check the Advisories web page at:
<http://project.pennera.upenn.edu/advisories>

- End-user support—For complete information on end-user support, please visit the PennERA Help page at:
<http://project.pennera.upenn.edu/help.asp>
- Training guide—A Proposal Development Training Guide is available on the web at:

https://rosetta.upenn.edu/cgi-bin/websec/websec_authform?app=RMDocs

Authenticate with your PennKey and PennKey password, then click “Proposal Development Training Guide (PDF)” under the “Proposal Development” section.

More Information about PennERA

For more information about PennERA, please visit the PennERA web site at:

<https://www.pennera.upenn.edu/>

If you have any questions, comments, or suggestions, please send an e-mail to:

pennera@pobox.upenn.edu

--Robin H. Beck, Vice President of Information Systems and Computing

--Pamela S. Caudill, Executive Director of the Office of Research Services

--Joseph R. Sherwin, Ph.D., Director of the Office of Regulatory Affairs

We'll Miss You Too Rose!



Travel Advisory

COMING SOON... NEW PARTNERSHIP BETWEEN PENN AND PHILLYCARSHARE

Penn is partnering with PhillyCarShare to create a Penn program. Details will be forthcoming on the Purchasing “What’s New in Purchasing” and the Travel web pages.

Penn will have an account with PhillyCarShare that includes special pricing. When driving on behalf of Penn, you will be able to create your membership profile with a purchasing card as your authorized form of payment so that charges will be billed directly to your department.



PhillyCarShare and Penn have joined together to offer a transportation option to the Penn community that supports less traffic, less auto emissions and a more “people friendly” neighborhood through an innovative community-based car sharing known as PhillyCarShare.

Created in 2002, PhillyCarShare is a non-profit organization designed to reduce the numbers of cars that commute or reside in the city by providing an easy and convenient alternative to auto ownership.

REMINDER: MY REIMBURSEMENTS

What is “My Reimbursements”?

My Reimbursements, a secure web site on U@PENN (www.upenn.edu/u@penn), allows faculty, staff and students to log in to see if a reimbursement request for travel, entertainment, or other eligible out-of-pocket expenses has been processed and funds deposited into their bank account or a check issued (for anyone without direct deposit).

How does “My Reimbursements” work?

My Reimbursements provides an electronic payment record that can be accessed at any time using a PennKey and password. Each record includes a check or reference number, payment date, payment amount, description, bank name and routing number (if applicable) and payment site (EFT for direct deposit; OFFICE if a check has been issued). Clicking on the reference number displays reimbursement details.

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Reference number	Payment date	Payment amount	Description	Bank name	Bank routing #	Payment site
501786	01/18/2007	\$453.20	REIMB MEETING IN TX	WACHOVIA-PA	031000503	EFT
Invoice #	Invoice date	Invoice amount	Description			
010307	01/10/2007	\$453.20	REIMB MEETING IN TX			
Reference number	Payment date	Payment amount	Description	Bank name	Bank routing #	Payment site



Travel Advisory

WHAT IS “MY REIMBURSEMENTS?”

Continued from the previous page

If you handle reimbursement requests in your office or department, please remind faculty and staff about My Reimbursements when they submit their paperwork. Those who receive reimbursements infrequently may not remember that the process changed when direct deposit for reimbursements was implemented in the spring.

NEW TRAVEL SERVICES PROJECT TEAM

The Travel & Entertainment Services Project team is launching a new Travel Services Advisory Team to assist in the reengineering of travel program at Penn. As the University’s Travel Administrator, Susan Storb will be leading this advisory committee as the project team launches new travel related projects. The advisory committee will be asked to work with the project team on the following initiatives and their input and feedback will be critical to the success of the project.



The following is a list of travel and entertainment enhancement projects that the team will address in FY2008:

- Review and revise all University related travel policies
- Creation of a travel section for the P2P web site that will streamline access to policies and links to process and procedural information
- Review and revision of the travel forms to be consistent with any new policies or procedures
- Creation of new process and procedural web pages that are accessed independently or from a link on the travel policy pages
- Creation of a new Travel Policy and Procedural training program
- Joint project with Purchasing on revising and improving travel procurement
- Review of proposed communication plans

Committee members will be required to attend meetings and represent the perspective of their School or Center in these discussions. They are expected to act as Champions in communicating back to their respective School or Center any new policies and procedures and procurement improvements that result from these committee meetings.

ONLINE DIRECT DEPOSIT NOW AVAILABLE

The Payroll Office is pleased to announce a new web service available Monday, July 30, providing you the ability to easily establish, change, or cancel direct deposit of funds to your bank account. Please note that any changes made to your direct deposit information applies to current and future payments resulting from employee compensation, reimbursements and student account refunds. To sign up for direct deposit or to make changes to existing direct deposit information please visit U@Penn at (www.upenn.edu/u@penn) and click on the UPDATE DIRECT DEPOSIT link under Payroll and Tax, then authenticate yourself with your PennKey and password and follow the directions provided. If you are having difficulty accessing the U@Penn portal with your PennKey and Password, please access the site at <http://www.upenn.edu/computing/pennkey/>. For those employees that do not have access to a computer, a kiosk is available outside of the Payroll Office for your convenience.

Please note that once you have made changes to your banking information you will receive an email notification confirming your changes. In order to ensure that you receive proper confirmation of changes, please make sure that your email address is up to date in the Penn Directory. If you have any questions, please contact your Business Administrator or the Payroll Office at (215) 898-6301.

Thank You!

The Payroll Department

DID YOU KNOW...

...Included on the Payroll's Department's Closing Schedule is the following:

- *Weekly Payroll Schedule*
- *Monthly Payroll Schedule*
- *Salary Management Schedule*
- *Paid Time Off Schedule*
- *Effort Reporting Schedule*

... For all employees who are included in 'Time Reporting' (Exception & Positive Pay) the **HOL Earnings Type** must be entered for all Holiday pay which includes the following:

- *Labor Day, Monday, September 3, 2007*
- *Thanksgiving, Thursday and Friday, November 22 and 23, 2007*
- *Christmas Day, Tuesday, December 25, 2007*
- *New Year's Day, Tuesday, January 1, 2008*
- *Dr. Martin Luther King, Jr. Day, Monday, January 21, 2008*
- *Memorial Day, Monday, May 26, 2008*

...If you are not sure if you **need financial training**, check out this website and answer these 10 questions to find out <http://www.finance.upenn.edu/ftd/registration.shtml>

...**Sally Buonadonna** has left the Financial Training Department and will be truly missed not only by FTD but by the many people she has helped navigate through the financial training adventure for the past 9 years. **All the very best Sally!**

*****STUDENT EMPLOYMENT OFFICE*****

In order to maintain an effective work-study program it is essential that all faculty, staff, and students who participate in the program must comply with the policies and procedures contained in the [Student Employee Handbook](#) (July 2007). This is a comprehensive handbook that covers the three types of student employee – Federal Work-Study, International Student Work-Study, and Student Worker. You can access the handbook at:

<http://www.sfs.upenn.edu/se/forms/StudentEmploymentHandbook.pdf>

A new section has been added to the [Student Employee Handbook](#) – **Section 12, Auditing Federal Work-Study** (page 18). For your convenience, the information contained in this section appears in the text box below.

Federal Title IV regulations require an annual audit of the Federal Work-Study Program. One segment of this review is to ensure that students are correctly paid and that time reporting is properly monitored by the appropriate supervisor.

*Each department has the option of paper or electronic time recording of the hours worked by its student employee. Approved supervisors are also responsible for the necessary signature, which is their confirmation of student's time worked. Those opting for paper time sheets **must** sign every form for which they are paying the student employee; those using electronic reporting can submit hours to the business administrator by e-mail with attached spreadsheet, then the e-mail must be retained by the business administrator, as this will suffice as the supervisor's electronic signature.*

Failure to comply with the above-mentioned policy and procedures will result in the department having to reimburse the federal work-study account for all applicable student wages. If there is continued failure on the part of the department to comply, then the department will have its privilege of employing Federal Work-Study students suspended.

I also wish to remind you of the federal requirement that all records pertaining to the Federal Work-Study Program must be retained for **three years** after the end of the Page 2 award year (academic or summer) for which the aid was awarded and disbursed under the program. Therefore, it is necessary for each department to retain all supporting documents and records for that amount of time.

The Student Employment Office will initiate a visitation program in the fall of 2007. Under this program, I will schedule visits to departments for the purpose of meeting with the SEMS coordinator to review policies and procedures of the work-study program, with special emphasize given to Federal Work-Study.

If you have any questions, please call me at 898-1418 or e-mail rudolph@sfs.upenn.edu.

Best wishes for an enjoyable and successful academic year.

Sincerely,
John N. Rudolph
Manager
Student Employment Office

2007-2008 WORK-STUDY PROGRAMS

The 2007-2008 academic year (fall/spring) work-study programs began on August 27th. The work-study pay schedule is located on the Student Employment Office website at:

<http://www.sfs.upenn.edu/seo>

As of August 27th eligible students can access the work-study Job Appointment Form (JAF) online via the Student Portal. Students must select the **Initial Job** button and print the JAF from the Employment section on Penn InTouch. A student **cannot** begin working until the JAF is presented to the supervisor and department business administrator.