**PennERA Upgrade Complete**

Penn’s Electronic Research Administration system (PennERA) was upgraded on August 31, 2015. The upgrade was required to effectively respond to current and future business needs and brought improved and enhanced functionality to users. There were no backend or system processing changes.

**Access**

Access to PennERA is the same as before the upgrade, although changes invisible to users facilitate true single sign-on to multiple applications using PennKey and PennKey Password.

**Proposal Development (PD) Enhancements**

Proposal Development screens have an updated look and feel with a more intuitive interface, and outdated icons were replaced with active links and easily recognizable buttons. There were no changes to the process for creating and completing a proposal. Specific enhancements included:

- Subcontract budget form import and export – For external subcontracts where Penn is the subcontractor, users are now able to import completed budget data directly from Adobe Research & Related (R&R) form sets into their Proposal Development records instead of entering the data manually. For projects where Penn is a subcontract recipient, users are able to export their PD-created Penn budget (if entered in detail using the generic template) to an Adobe R&R budget form, eliminating the need for duplicate data entry.

- Predictive text – Many alpha-split pick lists have been replaced with predictive text. The new predictive text boxes are available on the proposal search page as well as on PD screens. Users can simply begin typing a name and choose from a populating list resulting in fewer mouse-clicks and quicker loading times.

Continued on Page 6

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**Papal Visit and Payroll**

Due to anticipated logistical and transportation issues related to the Papal visit on September 26th and 27th, the payroll cutoff for week ending September 27th will be moved from Monday at 3:00 p.m. to Wednesday September 30th. The cutoff times for Time Reporting (3 p.m.) and Database Changes to existing records (5 p.m.) remain the same.

**Additional Pay** must be submitted by 5 p.m. on Thursday September 24th.

There is no impact on the September monthly payroll which runs on September 23rd. Please see the updated Payroll Closing Schedule:

http://www.finance.upenn.edu/comptroller/accounting/closingsch/payroll/

If there are any questions, please contact the Payroll Help Desk at 215-898-6301.

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**Philadelphia Wage Tax Rates**

The Philadelphia Wage Tax rates have changed effective July, 2015. The Philadelphia Resident rate changed from 3.92% to 3.9102%. The Philadelphia Non Resident rate changed from 3.4915% to 3.4828%.

If you have any questions, please contact the Tax and International Department at 898-6291 or tax@exchange.upenn.edu

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Treaty Exemptions

As the new semester is approaching and new students/scholars begin their educational journeys or appointments, please advise any foreign students/scholars they may be eligible for exemption from U.S. Federal taxes under tax agreements between the US and some foreign countries. Tax Treaty exemptions are granted on a calendar year basis for certain types of payments such as scholarship/fellowships and employment income. Please advise all monthly paid individuals who believe they are entitled to an exemption from Federal taxes to report to the Tax Office, 308 Franklin Building, 3451 Walnut Street. These individuals must bring their Penn ID to confirm their eligibility and sign the appropriate Tax Treaty documents for the 2015 tax year. They should also bring their most current immigration document with them. Please note, individuals must have a valid US tax identification number to be eligible for the exemption. The University is unable to provide treaty benefits to weekly paid individuals.

In order to meet the deadline for the September 2015 payroll, employees must visit the Tax Office, 3451 Walnut St, Room 308, by Tuesday, September 22, 2015. If they do not meet the September deadline they may still apply for the exemption, however the treaty benefits will not take effect until October. Please note that Payroll will not refund the Federal Withholding Tax for individuals who missed the September 2015 deadline. The individual can claim the exemption when filing their 2015 tax return. Please call the Tax Office at 215-898-6291 or email tax@exchange.upenn.edu with any questions or concerns.

Paperless W-2s

To reduce your risk of having your personal information go astray, employees may elect to opt out of receiving paper copies of your W-2. To receive your 2015 W-2 electronically, you must elect to opt out of receiving a paper W-2 by December 31, 2015.

To access your W-2 statement and to opt out of receiving a paper copy:
- Go to U@Penn and click on My Tax Info http://www.upenn.edu/u@penn
- Log-in to ADP W-2 services using your PennKey and password and enter the requested information
- On the Tax Statements screen, click on the “Click here for W-2 information for tax years 2013 and later.” link
- Click on “Paperless Options” on the “Myself” tab
- Check the “Access my W-2s and 1099s online only” box. Follow the remaining instructions to go paperless.
- You will also need to enter/update your e-mail address under “My Profile” on the “Myself” tab to ensure you receive notification when your W-2 is available.
- Be sure to close ALL browser windows when you have finished making your updates.

Additional W-2 Services Available

- Ability to upload payroll tax information directly into tax software such as TurboTax.
- Access to your W-2 much earlier than mailings.
- Ability to access your information from anywhere via a secure location.
- Online Help and FAQ.
- Access to W-2 forms 24 hours per day, 7 days a week for both Active and Terminated individuals. As a reminder, W-2 forms for tax year 2012 and prior will remain on the U@Penn portal under “My Tax Info”: http://www.upenn.edu/u@penn. Tax forms from 2013 and later are or will be available on the ADP site.

For additional questions or concerns, please contact to Tax Helpdesk at tax@exchange.upenn.edu or call 215-898-6291.

The Bottom Line  September 2015
Effective as of July 29, 2015 a new field “Work Location” in the University’s PennWorks /Personnel/Payroll system was implemented to capture the employees’ work location. This effort was required as part of a broader University effort to ensure our payroll process is compliant with State and Local income tax withholding requirements.

Personnel/Payroll Administrators can enter or update the information in the Work Location field in PennWorks by simply selecting the Mail Code of the building in which the employee works. For employees working off-campus at a location without a Mail Code, select the Custom Address radio button and enter the street address, city, state and zip code of the location where the employee works. The address entered will then be validated. For employees working outside the United States, select Custom Address and select the country in which the employee works from the drop down box in the Country field. “Country” is the only field required to be populated for addresses outside the United States.

If the employee works at more than one location, the location where the employee spends the majority of his/her time should be entered as the Work Location. Only the Personnel/Payroll Administrators having update access to Bio tab in PennWorks may update the Work Location, not the employee.

Current Employees

Upon implementation, for existing employees, the Work Location field will be populated with the Building associated with the Mail Code in each employee’s personnel record in PennWorks, along with the street address, city, state and zip code for that Building. For those employees who work at an off-campus location that does not have a Mail Code, the Work Location field will be updated from the list of off-campus employees currently maintained by the Payroll and Payroll Tax Offices.

Personnel/Payroll Administrators are asked to verify the Work Locations of their employees especially those who work at off-campus locations, and should make any necessary changes. A report will be available soon to assist with this verification. A notice will be sent when the report is available. This verification should be completed by September 30, 2015.

New Hires

The PennWorks “Add a Person” function has been updated to include the Work Location Field. Custom addresses for locations in the United States entered into Work Location will be validated when entered.

Changes to Work Location

Moving from one work location to another may also impact an employee’s tax withholding and the University’s responsibility to report and remit taxes in the new locality, state or country. Changes to an employee’s Work Location should be made in PennWorks whenever there is a permanent change to work location. Additionally, changes to Work Location should be made when there is a temporary change to an employee’s work location if:

- The employee’s work location moves from one locality to another or from one state to another for more than 30 days, or
- The employee’s work location moves from the United States to another country, from another country to the United States or from one foreign country to another for more than 90 days. Contact the Office of Global Support and/or the Office of Tax and International Operations prior to having an employee relocate outside the US to ensure compliance with all US and in-country requirements.

If you encounter problems or have questions, please call PennWorks at 6-HELP (215-746-4357), choose Option 5 for PennWorks, and enter your 2-digit School/Center code (the first 2 digits of your CNAC).

Bottom Line  September 2015
From the Offices of: Budget and Management Analysis and Human Resources

In response to feedback from hiring officers and from the Student Employment Office about the potential dampening effect on student employment, the Budget Office and Human Resources reviewed Penn’s plans to charge the full time Employee Benefits (EB) rate on student workers who become eligible for health coverage under the Affordable Care Act (ACA).

Given the feedback, and the limited number of student workers we expect to become eligible for health care under the ACA, we have agreed that Penn will NOT charge the full time EB rate on the pay of Type 5 (weekly student) employees during the pilot implementation phase in FY16 and FY17. We will review the EB rate implications and other aspects of our implementation once we have some experience with the ACA, which we expect to take up to two years.

What Will Happen to Penn Student Workers Under the ACA?

Federal Work Study students are exempted from the Affordable Care Act, but other student worker classifications (Student Worker A and Student Worker B) must have their hours reported and ACA eligibility status determined. Eligibility for health coverage under the ACA will be achieved when a student worker averages 30+ hours in any 90 day period. Since student workers are allowed to work 40 hours during the summer, a limited number of student workers may achieve eligibility based on their work in the summer months. It is University policy that full time students pay the clinical fee providing coverage at Student Health, and either enroll in Penn sponsored insurance or provide proof of other insurance, so it may be reasonable to assume that most student workers will decline ACA health coverage once they are deemed eligible. Therefore, we do not expect a large expense to the EB pool.

The Rules for Student Workers at Penn

a. Current Penn students, who do not have a work-study award, are eligible to be appointed as student workers.

b. Students at other institutions and people who are not students may not be appointed as student workers; these workers must be classified as job class 599050, Temporary Extra Worker or another appropriate job class.

c. The job class 599070, Student Worker A, is to be used during the academic year (fall and spring semesters, including the fall, winter and spring breaks). Students in this job class are limited to a maximum of 20 hours per week when classes are in session, and 40 hours per week during breaks. The Student Worker A job class is typically used with an earnings type of SW1 (in class). It is not necessary to change the job class or earnings type for the short breaks during the academic year.

d. The job class 599071, Student worker B, is to be used during the summer. Students in this job class are limited to a maximum of 40 hour per week. The Student Worker B is typically used with an earnings type of SW2 (not in class). However, if students are enrolled in Summer Session classes, use SW1. Part time Penn students may be appointed as student workers, but may not work more than 20 hours per week when class is in session, or 40 hours per week during breaks and in the summer. If you want to hire a part time Penn student to work more hours, use another appropriate job class.

e. Students on leave of absence from Penn may not be appointed as a Student Worker. Use another appropriate job class.

Please Note: A listing of Job Class Codes, Object Codes, and Earnings Types for Work-Study and Student Worker is available under the Faculty/Staff tab on the Student Employment website at:

http://www.sfs.upenn.edu/seo
Penn Community/Research Coordinators,

Penn is excited to introduce the Greenphire ClinCard, a reloadable prepaid card now available to research coordinators as a ‘human subjects’ payment option. The card offers a faster and safer method to pay your study participants and will provide an excellent alternative to AP checks, gift cards and petty cash. In addition, Greenphire supplies a convenient administrative tool for loading, tracking and reporting your studies’ payments. You will have the option to select generic or Penn branded cards.

Benefits:

- Direct on site disbursement
- Reduced administration
- Branding
- Improved compliance, accounting and tax reporting
- Enhanced processing/tracking/reporting
- Retention
- Messaging

You can find more information on the Disbursements website (including a user demo). There is also a link to request cards.

http://www.finance.upenn.edu/comptroller/accts_payable/Greenphire/

I want to thank our requirement gathering teams, advisory group, pilot/trial teams, CHOP, Brent Friedman (Purchasing), Bill Melleby (Disbursements), Jeff Danielewicz (Information Technology and Support) and Carlos Vega (Wharton alumni) for their support launching this payment solution.

Please help us:

**Spread the word...**

Thanks,

Michael J. Popko
Director of Disbursements
Comptroller Office
Suite 310
3451 Walnut Street
Philadelphia, PA 19104-6284
215-898-1443
mpopko@upenn.edu

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**COMING OCTOBER 20TH 2015! PAYROLL/TAX/ACCOUNTS PAYABLE Q & A SESSION**

This session is to provide an opportunity for University Business Administrators to ask questions of the following departments: Payroll, Tax and International Operations, and Accounts Payable. Topics included will be new hires, time reporting, monthly payroll calendar, Foreign National payments and required documents, Non-Resident Alien process improvements, Honorariums, tips on resolving Holds, 1099s, etc.

To better serve your needs, feel free to send any questions you may have in advance to training@exchange.upenn.edu by October 1st, 2015 and we will incorporate them into the discussion.

To register, go to http://knowledgelink.upenn.edu and search using the word ‘Payroll’. We look forward to seeing you in October!
To assist BEN Buys PO Managers with resolving their ‘Holds’ below is an updated grid indicating the type of Hold and how to either ‘Approve’ or ‘Cancel’ and invoice.  Please note: For ‘Quantity Receipt Holds (Qty Rec)’, in order to resolve the ‘Hold’, you need to log into BEN Financials and process the receipt.  Clicking on either ‘Holds Resolved’ or ‘Route to Accounts Payable’ will not remove the Hold.

### Hold Resolution Grid

<table>
<thead>
<tr>
<th>Hold Type</th>
<th>Approve Invoice</th>
<th>Cancel Invoice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quantity Ordered Hold (Qty Ord)</td>
<td>Click on ‘Resolve Holds’. Please do not type anything in the Comments box.</td>
<td></td>
</tr>
<tr>
<td>Maximum Shipment Hold (Max Ship Amount)</td>
<td>Click on ‘Resolve Holds’. Please do not type anything in the Comments box.</td>
<td>Click on ‘Return to Accounts Payable’ with the reason for cancellation in the comment box</td>
</tr>
<tr>
<td>Quantity Receipt Hold (Qty Rec)</td>
<td>Log on to BEN Financials and process receipts via Requisitioner or PO Manager Responsibility. Please do not use ‘Holds Resolved’ or ‘Route to Accounts Payable’ to indicate ‘OK to pay’. These will not remove the Hold.</td>
<td>Important! Please do not click on ‘Resolve Holds’</td>
</tr>
<tr>
<td>Multiple Holds</td>
<td>Click on ‘Resolve Holds’. If one of the holds is a QTY REC Hold, log on to BEN Financials and process receipts via Requisitioner or PO Manager Responsibility</td>
<td></td>
</tr>
<tr>
<td>Request Comment (170_SYSTEMS_HOLD)</td>
<td>Review message sent by Accounts Payable by clicking on Action History. Read the comment by clicking on the ➤. Click on ‘Return To’ with information requested.</td>
<td></td>
</tr>
</tbody>
</table>

Here is a link to the complete Managing Holds QRG

• Editable attachment file names – Users are able to easily rename uploaded system-to-system proposal documents in one place via a simple editor on the Finalize tab. This eliminates the need to remove a file and re-upload it with a different file name at its original location.

**Complex Projects Functionality and Research Portal**

The new version of the software lays the groundwork for NIH Complex Project/Multi-Project system-to-system submission functionality and eventually a single Research Portal:

• Development of the NIH Complex Project/Multi-Project functionality is currently underway. Once available, users will no longer need to work in NIH’s ASSIST system and can create these projects in Proposal Development where the look and process is familiar. We anticipate that a small pilot of the Complex Projects functionality will begin soon.

• The Office of the Vice Provost for Research is embarking on the development of an Investigator Single Portal that will ultimately consolidate and streamline electronic systems that enable research. Software changes in this upgrade help facilitate the development of a Portal to integrate data from disparate research systems.

**Demo Sessions**

Demo sessions were scheduled both before and after the upgrade to introduce users to the updated interface and enhancements. PennERA users were contacted directly with details.

**End-User Support and Reference Materials**

For questions or assistance, please consult the following resources:

• Reference materials – Updated reference materials, including the Proposal Development User’s Guide and Quick Reference Guides, are available on the PennERA website at:

  [http://www.upenn.edu/researchservices/PennERA.html](http://www.upenn.edu/researchservices/PennERA.html)

• E-mail – If you have any questions, please send an e-mail to pennerahelp@lists.upenn.edu

• Web – For general information on PennERA, please visit the website at [https://www.pennera.upenn.edu/](https://www.pennera.upenn.edu/)

--The PennERA Team

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**New Employee Benefit Rate Agreement**

PennERA Proposal Development has been changed to reflect the date of the latest DHHS negotiated rate agreement, effective 6/17/15.

The only rate change with this new agreement is regarding full-time employee benefits. The full-time employee federal fringe benefit rate has been increased from 32.0% to 32.2%. The total non-federal benefit rate also increased from 34.3% to 34.5%, because it includes the tuition benefit (2.3%). The part-time rate (9.7%) remains unchanged.

In PennERA Proposal Development, all salary information entered beginning immediately, in both new and existing proposals, will automatically calculate using the new rates. However, in existing proposals for any personnel whose information was entered before 6/24/15, users must follow the steps below in order to cause a recalculation to occur:

• Click the open icon for each person whose salary and benefits information has already been entered.

• Click the Save icon to force a recalculation.

  **NOTE:** It is not necessary to enter the ‘Edit Details’ screen to force the recalculation.

  **PD will allow users to save in the first screen displayed for each person you select.**

For NIH submissions, the new rate agreement date appears in the built budget forms ONLY for modular proposals and the associated “assembled doc” found on the Finalize tab of S2S proposal records.

• The rate agreement date does NOT appear on 424 R&R Detail Budget forms.

• The new date will appear only in records CREATED after 1 PM, 6/24/15.

• Records created prior to 1 PM, 6/24/15, will have the old date, but this will not cause any submission failures at Grants.gov or at eRA Commons. The new date and agreement is available electronically to NIH staff.

Please send any questions to PennERAhelp@lists.upenn.edu and be sure to let us know if you believe the calculations are not correct.
**Effort Reporting FY16 Key Dates for Planning Purposes**

<table>
<thead>
<tr>
<th>Effort Reporting Period</th>
<th>Description, Start and End Dates</th>
<th>Last Date for Reallocations through Payroll*</th>
<th>Date Forms are Available</th>
<th>Closing Date/Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>083115</td>
<td>Summer 06/01/2015 - 08/31/2015</td>
<td>9/21/2015</td>
<td>9/28/2015</td>
<td>12/1/2015</td>
</tr>
<tr>
<td>093015</td>
<td>Quarter 1 - Weekly 07/01/2015 - 09/30/2015</td>
<td>10/26/2015</td>
<td>11/2/2015</td>
<td>1/8/2015</td>
</tr>
<tr>
<td></td>
<td>Fall Semester - Monthly 07/01/2015 - 12/31/2015</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>063016</td>
<td>Quarter 4 - Weekly 03/31/2016 - 06/30/2016</td>
<td>7/25/2016</td>
<td>8/1/2016</td>
<td>9/30/2016</td>
</tr>
<tr>
<td></td>
<td>Spring Semester - Monthly 01/01/2016 - 06/30/2016</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*This is the late payroll processing date that will be captured in ERS. It is recommended to submit reallocations through UMIS through earlier payroll run cycles to ensure processing completion by this date.

These dates have been posted to the Effort Reporting section of the ORS website:
http://www.upenn.edu/researchservices/effortreporting.html
ONE IACUC Protocol/Multiple Funding Sources – POLARIS Preparations

On September 14, 2015, Penn’s Online Laboratory Animal Resources Information System (POLARIS) will be upgraded to version 5.0, and new functionality will be added to the Animal Research Information Electronic Submissions (ARIES) system as part of the One Protocol, Multiple Funds project. These changes are anticipated to increase the efficiency and flexibility in administering animal protocols by changing the method of cost allocation to allow multiple funding sources to be linked to a single IACUC-approved protocol.

Overview

New functionality is being added to ARIES that will enable principal investigators (PIs) to combine projects that share the same scientific goals. Researchers will be able to assign multiple grant proposals and fund numbers to a new or currently approved IACUC protocol. After protocols are linked to grant proposals and approved in ARIES, and the protocol and related financial information feeds into POLARIS, POLARIS users can then activate related funding sources to be used for animal purchasing, per diems, and services.

POLARIS Default Account Setup – Required by 9/11/15

Prior to rollout of the upgraded system, POLARIS Business Office Approvers (BOAs) are required to perform an important setup task in order to avoid any unnecessary delays in researchers using the POLARIS system following the upgrade. POLARIS BOAs received details and specific instructions on how to set up a default account; highlights include:

- All active protocols that are managed through POLARIS and/or generate POLARIS invoices must have a default account assigned in POLARIS before any future charge-related actions may be incurred against a protocol (e.g., creating requisitions, ordering cage cards, etc.).
- This default account – a non-grant, unrestricted account – is required to ensure regulatory compliance so that charges will not be incurred against a grant after an account reaches its expiration date.
- There are multiple email warnings sent to both the principal investigator and the BOA(s) before charges will be automatically switched from an expiring account to the protocol’s default account.

Implementation Expectations

If a default account is defined prior to the implementation, existing accounts in POLARIS will be automatically activated when the system is upgraded. After the upgrade, BOAs will need to verify the accounts automatically activated and activate/deactivate accounts as needed, update system-generated account “nicknames” to represent useful identifiers for 26-digit accounts, and verify or reset system-generated “Active Start” and “Active End” dates for accounts to be used on a protocol.

IMPORTANT NOTE: Protocols with invalid accounts in POLARIS (i.e., expired accounts and/or 5-funds not linked to the protocol in ARIES) will not be activated upon rollout and may cause delays in requesting ULAR services after the implementation. To avoid these delays, a valid account must be assigned to active protocols in POLARIS before rollout.

End-User Support and Reference Materials

For questions or assistance, please consult the following resources:

- “POLARIS 5.0 Training - What’s New? - ULAR” – See the training course for an overview of the new functions, terminology, and screen layouts in the upgraded system, including key information by role; log into Knowledge Link at: http://knowledgeLink.upenn.edu and search by title to locate the course
- Reference materials – POLARIS FAQs as well as detailed Quick Guides with “how-to” information by function are available on the POLARIS website at: https://www.ular.upenn.edu/polaris/
- E-mail – If you have POLARIS questions, please send an e-mail to Polarishelp@lists.upenn.edu; for ARIES questions, contact aries@pobox.upenn.edu
- Web – For general information on POLARIS, please visit the POLARIS website at: https://www.ular.upenn.edu/polaris/; for ARIES information, visit the IACUC website at http://www.upenn.edu/regulatoryaffairs/index.php?option
The University has a direct bill option for the payment of airline tickets. It can be used for any ticket purchased that is university-related and eligible to be expensed to a 26 digit budget code. This option is available for faculty, staff and students. It is also the preferred method when booking guest travel that is at the University’s expense. Some of the benefits of exercising the direct bill option include:

- Eliminating the use of personal funds for university-related air travel,
- Reducing staff time spent on reimbursement paperwork for guest travel expenses,
- Ongoing access to Penn negotiated rates with airlines,
- Monitoring and managing outstanding unused tickets,
- Supporting the traveler 24/7 as our preferred travel management company assists with any flight delays and cancellations, and
- Offering essential travel information to support Penn’s ongoing Duty of Care program.

How Do I Use the Direct Bill Option for Air Travel?

- Travelers can book air travel in Concur and select direct bill option under Payment Method. Provide the budget code information when requested two screens later. Confirm Payment Method as Direct Bill. If there is no approver in the traveler’s profile, such as for a guest, provide the approver’s email address when requested.
- Call World Travel directly at 888-641-9112 to book airline travel. Request to direct bill to the university. Provide an approver name and email.

Please contact Hilary Easley, Penn Travel and Expense Program Manager, at easleyh@upenn.edu if you have any questions.

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 November 1, 2015.

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

Last Quarter’s Winner – Congrats!
Laurie-Ellen Shumaker, JD
Institutional Real Estate Lease Administrator
Facilities and Real Estate Services Division

1. What is the email address to use when an Alternate Assignment in BEN Buys is needed?
2. What is the last day an employee may elect to opt out of receiving paper copies of your W-2 to receive your 2015 W-2 electronically?
3. What is the Time Reporting cutoff (date and time) of for payroll ending on September 27?
4. What is the date and time of the Purchasing Supplier Show?
5. What are the training pre-requisites for the Manual Journal Entry class?

Bonus: When is the next Payroll, Tax and International Operations and Accounts Payable Q & A Session?
Purchasing Services
Annual Supplier Show 2015
At Annenberg Center for Performing Arts | 3680 Walnut Street

Discover New and Innovative Supplier Solutions and Savings

Wednesday September 30, 2015
10:00 AM – 2:00 PM

- Over 50 suppliers
- Door Prizes
- Supplier Samples
- Lunch

Follow us @PurchasingUPENN
SupplierShow2015

Penn Purchasing Services

For more details and advance registration go to
http://www.purchasing.upenn.edu/show15.php
Financial Systems

Fast Facts

BEN Knows

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

- BEN Financials Access eForms must be filled out by the User. A Supervisor may not submit eForms on User’s behalf.
  - Exceptions are when Employee/Consultant is no longer with Penn (Delete Logon ID), or transferring to another School/Center (Transfer)
- To permanently change your Default Approver for Requisitions only, the BEN Financials eForm is no longer needed; just email the Purchasing Department directly at purchsup@exchange.upenn.edu to request the change.

- To change a Buyer, a Change Buyer Request Form can be found in Documents/Forms, under the Comptroller’s website at http://www.finance.upenn.edu/comptroller/forms/#BEN. The form can be e-mail to Purchasing Services at purchsup@exchange.upenn.edu.
- An Alternate Assignment for PO Manager is needed when:
  - PO Manager leaves the University*
  - PO Manager transfers Departments (ORGs) and does NOT retain the PO Manager Responsibility*
- To obtain an Alternate Assignment
  - Send an email with your name (PO Manager name) to benadmin@lists.upenn.edu and indicate who will be the Alternate Assignment and for how long. If the length of time is unknown or long term leave, you can simply say “on leave”
  - Alternate Assignment must have PO Manager Responsibility*
* When PO Manager leaves the University or does not retain PO Manager Responsibility, the Supervisor needs to complete the BEN Financials Access Request eForm and note Remove PO Manager and enter an Alternate Assignment on the eForm.

Penn Hotel Rates

The Hilton Inn at Penn and Sheraton Philadelphia University City hotels would like to thank the University community for its patronage over the last year. This year’s Special Penn Rates (available for rooms booked using a Penn Budget Code) are as follows:

- Hilton Inn at Penn:
  - $250/night from July 1-December 31, 2015
- Sheraton Philadelphia University City:
  - $194/night from July 1, 2015-June 30, 2016

Visit their websites to learn more about these properties and the amenities offered to their guests.

Inn at Penn www.theinnatpenn.com
Sheraton www.philadelphiasheraton.com

The Bottom Line September 2015
Human Resources
Tax-Deferred Retirement Plan
https://www.hr.upenn.edu/myhr/benefits/retirement/tdr
Retirement Savings Counseling
www.meetvanguard.com
www.tiaa-cref.org/letstalk1
Rule of 75
https://www.hr.upenn.edu/myhr/benefits/retiree
Flexible Spending Accounts
https://www.hr.upenn.edu/myhr/benefits/health/fsa
Life Insurance Benefits
https://www.hr.upenn.edu/myhr/benefits/health/life
Funeral Planning Services
https://www.hr.upenn.edu/myhr/benefits/health/life/funeral
Family & Medical Leave Act (FMLA)
https://www.hr.upenn.edu/myhr/resources/policy/timeoff/fmla
Disability Benefits
https://www.hr.upenn.edu/myhr/benefits/health/disability
Long-Term Care
https://www.hr.upenn.edu/myhr/benefits/health/additional/ltc
Be in the Know
https://www.hr.upenn.edu/myhr/worklife/healthy/know
Health Advocate
https://www.hr.upenn.edu/myhr/benefits/health/healthadvocate
Flexible Work Options
https://www.hr.upenn.edu/myhr/worklife/workandlife/flexoptions
Employee Assistance Program
https://www.hr.upenn.edu/myhr/learning/career/coaching
Annual Health Fair
https://www.hr.upenn.edu/myhr/worklife/healthy/fair
Employee Resource Fair
ContactPPSAorWPPSA
Worklife Workshops
https://www.hr.upenn.edu/myhr/worklife/workandlife/workshops
Annual Flu Shot
https://www.hr.upenn.edu/myhr/worklife/healthy/flu
Health Risk Assessments
https://www.hr.upenn.edu/myhr/worklife/healthy/hra
Starting or Growing Your Family
https://www.hr.upenn.edu/myhr/worklife/family
Snow Day Child Care
https://www.hr.upenn.edu/myhr/worklife/family/snowday
Penn’s Backup Care Program
https://www.hr.upenn.edu/myhr/worklife/family/backcare

Take Our Daughters and Sons to Work Day
https://www.hr.upenn.edu/myhr/worklife/family/kidstowork
Penn Family Day
https://www.hr.upenn.edu/myhr/appreciation/familyday
Penn’s Quit Smoking Program
https://www.hr.upenn.edu/myhr/worklife/healthy/quit
Weight Watchers at Penn
https://www.hr.upenn.edu/myhr/worklife/healthy/weightwatchers
Tuition Benefits for You
https://www.hr.upenn.edu/myhr/benefits/tuition
Tuition Benefits for Your Family
https://www.hr.upenn.edu/myhr/benefits/tuition
Managing Your Career
https://www.hr.upenn.edu/myhr/learning
Career Coaching
https://www.hr.upenn.edu/myhr/learning/career/coaching
Resolving Workplace Issues
https://www.hr.upenn.edu/myhr/workplaceissues
Safety
HELP Line
UPennAlert
http://www.upenn.edu/directories/
Walking Escort Services
http://www.publicsafety.upenn.edu/security-services/walking-escort/
Lockout and Jump-start Services
http://www.publicsafety.upenn.edu/security-services/lockout-and-jumpstart-services
RAD Defense Courses for Men and Women
http://www.publicsafety.upenn.edu/special-services/rad/
Emergency Phones
http://www.publicsafety.upenn.edu/TEC/blue-light-ephones/
Penn Guardian
https://www.publicsafety.upenn.edu/safety-initiatives/pennguardian/
Ergonomics Tips
http://www.ehrs.upenn.edu/programs/occupat/ergo/computer/checklist/
Privacy
http://www.upenn.edu/oacp/privacy/
Discover the Benefits of Penn

Dining on or Around Campus

Places to Dine on Campus
https://cms.business-services.upenn.edu/dining/hours-locations-a-menus/retail-dining.html

The University Club at Penn
http://cms.business-services.upenn.edu/universityclub/

Getting Around

(COMPASS, TransitChek®)

PATCO Freedom Pass, N.J. Transit
http://cms.business-services.upenn.edu/parking/sustainable-commuting/public-transportation/faculty-and-staff.html

SEPTA Pass Perks
http://www.septapassperks.org/

LUCY
http://cms.business-services.upenn.edu/transportation/commuter-transit-options/lucy-bus.html

Travel Reservations
http://cms.business-services.upenn.edu/penntravel/make-travel-reservations.html

Parking on Campus
http://cms.business-services.upenn.edu/parking/

Occasional Parking
http://cms.business-services.upenn.edu/parking/parking-permits/occasional-parking.html

Penn Cycle
http://app.penncycle.org/

Zipcar
http://www.zipcar.com/penn

Discover Penn – Tour of Campus
http://www.facilities.upenn.edu/maps/discover-penn

The Bottom Line

September 2015

Staff Discounts

Penn Home Ownership Services
http://cms.business-services.upenn.edu/homeownership/

U of P Federal Credit Union
http://www.uopfcu.com/default.htm

Bank of America Credit Card
http://cms.business-services.upenn.edu/resources-and-links/credit-card.html

PNC WorkPlace Banking

Ford and General Motors
https://www.hr.upenn.edu/myhr/benefits/dealsatpenn/cocardiscount

Cell Phones
http://www.upenn.edu/computing/voice/cellular/

Office Depot
https://business.officedepot.com/b2b/portalLoginPage.do

My Smile Boutique
http://www.purchasing.upenn.edu/buytools/mysmileboutique.php

Apple
https://cms.business-services.upenn.edu/computerstore/apple-store-for-individual-purchasers-gateway.html

Dell
https://cms.business-services.upenn.edu/computerstore/dell-premier-for-individual-purchasers-gateway.html

Penn Bookstore 36th and Walnut Streets

Computer Connection
http://cms.business-services.upenn.edu/computerstore/

Penn e-cards
http://www.business-services.upenn.edu/ecard

Penn’s Pet Care Benefits
http://www.vet.upenn.edu/veterinary-hospitals/ryan-veterinary-hospital

The Morris Arboretum
http://www.business-services.upenn.edu/arboretum/index.shtml

Rentals
http://www.business-services.upenn.edu/arboretum/rentals_weddings.shtml

“You Decide”
https://www.hr.upenn.edu/myhr/benefits/dealsatpenn

Fitness: Global Fit
https://www.hr.upenn.edu/myhr/worklife/healthy/globalfit

Funsavers
http://phillyfunguide.com/funsavers

Six Flags Theme Park

The Arts at Penn

Institute of Contemporary Art
http://www.icaphila.org/

Arthur Ross Gallery
http://www.upenn.edu/ARG/

Annenberg Center for the Performing Arts
http://www.annenbergcenter.org/
DISCOVER THE BENEFITS OF PENN

Penn Museum
http://www.museum.upenn.edu/

Dance Lessons
Penn Latin and Ballroom Dance
http://www.dolphin.upenn.edu/ballroom/

UPenn Argentine Tango Club
http://www.dolphin.upenn.edu/tango/

WXPN Free at Noon
http://provost.upenn.edu/initiatives/arts/centers/wxpn

Department of Music
https://www.sas.upenn.edu/music/performance/performance-calendar

Movie Rentals
http://dla.library.upenn.edu/dla/vcat/index.html

Contemporary International Film Series
http://cinemastudies.sas.upenn.edu/

Recreation
PennRec
http://www.upenn.edu/recreation/

The Energy Zone
http://www.upenn.edu/recreation/about/energy-zone/

Pilates
http://www.upenn.edu/recreation/fitness-wellness/pilates/

Group Exercise
http://www.upenn.edu/recreation/fitness-wellness/group-exercise/

Yoga
http://www.upenn.edu/recreation/fitness-wellness/instructional-classes/yoga/

Golf
http://www.upenn.edu/recreation/about/golf-simulator/

Dance
http://www.upenn.edu/recreation/fitness-wellness/instructional-classes/dance/

Karate
http://www.upenn.edu/recreation/fitness-wellness/instructional-classes/martial-arts

Personal Training
http://www.upenn.edu/recreation/fitness-wellness/personal-training/

Massage Therapy
http://www.upenn.edu/recreation/membership-services/massage-therapy/

Structured Sports
http://www.upenn.edu/recreation/intramurals/

Robert P. Levy Tennis Pavilion
http://www.penntenniscenter.com/

Outdoor Adventure
http://www.upenn.edu/recreation/outdoor-adventures/

Ringe Squash Courts
http://www.upenn.edu/recreation/about/facilities/ringe/

Penn Park
http://tiny.cc/yabilux

Ice Rink
http://cms.business-services.upenn.edu/icerink/

Penn Relays
http://www.ThePennRelays.com

Campus Organizations
PPSA
http://penn-ppsa.org/

WPPSA
http://www.upenn.edu/wpsa/

The Netter Center
https://www.nettercenter.upenn.edu/programs

LGBT
http://www.vpul.upenn.edu/lgbt/

Sports Club
http://www.upenn.edu/recreation/sports-clubs/sports-club-directory/

Staff/Faculty Eco-Rep
http://www.upenn.edu/sustainability/eco-reps/staff

The Kelly’s Writer’s House
http://writing.upenn.edu/wh/involved/groups/

Penn Gamers Club
http://www.dolphin.upenn.edu/pgamers/

PAACH
https://secure.upenn.edu/vpul/paach/

Penn Women’s Center
http://www.vpul.upenn.edu/pwc/

Penn Knitter’s Club
E-mail: Donna Gladstone, dpg@upenn.edu

La Casa Latina
http://www.vpul.upenn.edu/lacasa/index.php

Center for Italian Studies
http://www.sas.upenn.edu/italians/news

African American Resource Center
http://www.upenn.edu/aarc/

Penn Club of New York
http://www.penncclub.org
Dear Colleagues,

When a new employee arrives at Penn and is in need of financial training, feel free to guide them to our website where you can find a host of useful information to ‘shepherd’ your new person prior and/or upon their arrival to Penn. Some key information that might be useful is as follows:

**Calendar**
[http://www.finance.upenn.edu/ftd/calendar.shtml](http://www.finance.upenn.edu/ftd/calendar.shtml)

**Courses**
[http://www.finance.upenn.edu/ftd/courses.shtml](http://www.finance.upenn.edu/ftd/courses.shtml)

**Documentation**
[http://www.finance.upenn.edu/ftd/documentation.shtml](http://www.finance.upenn.edu/ftd/documentation.shtml)

**Training and Access Requirements Grid**

We look forward to seeing your new employee in an upcoming class!

The Financial Training Department

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**Elena McClelland**
Learning and Education
Elenamcc@upenn.edu