

UNIVERSITY *of* PENNSYLVANIA

PennWorks

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Introduction

This section will explain how to navigate through the various PennWorks screens to add and/or update payroll information for University employees.

Correcting Errors

Most times when an in data entry error is made in PennWorks you can correct the mistake on your own. However, there are some fields that cannot be changed unless you contact to HR Records to request they make the correction. Documentation showing proof of the corrected information may be required. **These fields which cannot be changed are:**

- Social Security Number
- Birth Date
- Class Entry Date
- Job Class Code
- Status Date
- Ethnicity
- Military Status

Task: Logon and Navigate in PennWorks

Task Definition: Logon to PennWorks using your PennKey and Password. In addition see information regarding, Task Drop Down, Help and Resources. Go to the following link for detailed steps on how to perform this task:

http://www.finance.upenn.edu/ftd/documentation/Logon_and_Navigate.pps

PennWorks Link

<https://medley.isc-seo.upenn.edu/webCompensation/jsp/fast2.do>

PennWorks Help

For help with the PennWorks application, contact the PennWorks Representative in your School/Center for policy and organization-specific questions. Please check with your Senior Business Administrator for the contact information of your School/Center PennWorks Representative.

You can also call the help line at 6-HELP (215-746-4357), enter your 2-digit School/Center code (the first 2 digits of your CNAC), then choose Option 5 for PennWorks. This single help-desk number can be used for all operational and technical questions.

Task: Find a Person

Task Definition: Search for and retrieve existing payroll records. Go to the following link for detailed steps on how to perform this task:

http://www.finance.upenn.edu/ftd/documentation/Find_a_Person.pps

Task: Browse

Task Definition: In this task, you will view a person's record. Go to the following link for detailed steps on how to perform this task:

<http://www.finance.upenn.edu/ftd/documentation/Browse.pps>

Task: Add a Person

Task Definition: In this task, let's enter a new hire into PennWorks. Go to the following link for detailed steps on how to perform this task:

http://www.finance.upenn.edu/ftd/documentation/Add_a_Person.pps

Task: Add a Role

Task Definition: In this task, you can add additional roles to an existing employee's record. Go to the following link for detailed steps on how to perform this task:

http://www.finance.upenn.edu/ftd/documentation/Add_a_Role.pps

Task: Update Bio Info

Task Definition: In this task, you will update biographical information for an employee record.

Go to the following link for detailed steps on how to perform this task:

http://www.finance.upenn.edu/ftd/documentation/Update_Bio_Info.pps

Task: Transfer Home ORG

Task Definition: In this task, you will see how to transfer an employee record to another Home organization. Go to the following link for detailed steps on how to perform this task:

http://www.finance.upenn.edu/ftd/documentation/Home_ORG_Transfer.pps

Transferring Employees between Departments/Positions

Transfers In

Contact the Business Office of the ORG who currently holds the record and supply your ORG number, Mail Code and the Name and/or Social Security Number of the employee you want transferred in. Once the record has been transferred to your ORG you can update the appropriate PennWorks screens.

Transfers Out

DO NOT TERMINATE THE EMPLOYEE if the record is currently Active. A Letter of Resignation should be submitted by the transferring employee. If you are the Home ORG, you can transfer all records within your ORG, EVEN IF THEY ARE TERMINATED.

Transfer from a Weekly to a Weekly Position

When a person transfers from one weekly position to another, **it is preferred the new position begin on the first day of a new pay cycle**; however, the physical record transfer should occur the day after a pay cycle is completed.

For example, Margaret Wulfe is a 525620 - ADMIN ASST A in History and is transferring to a 420065 - TECH RESEARCH LAB B in Chemistry. She can start her new position in Chemistry on any Monday; however, her record should be transferred the next day, Tuesday, so that she will receive her final pay from History.

Transfer from a Monthly to a Monthly Position

When a person transfers from one monthly position to another, **it is preferred the transfer happen on the first day of the month.**

For example, Albert Hankowski is a 130200 - MANAGER C in the Comptroller Office and is transferring to become a 345349 - MGING EDITOR, COMPASS. It is preferred he transfer on the first day of any given month.

However, if Albert should transfer in the middle of the month, the following should take place: The transferring department (the Comptroller Office) leaves the distribution line in PennWorks, but changes the Start Date to the first day of the current month and the Stop Date to the last day worked in the department.*

Transferring Employees between Departments/Positions (continued)

The receiving department (Compass) changes the Class Entry Date and Begin Date to be the first of the month in the new job, and updates the new Position Inventory Number.*

The new department also adds a Line 2 of distribution with a Start Date of the first day in the new job and a Stop Date of the end of the Fiscal Year (or Project Year).*

After the first monthly payroll has run in the new job, the Line 1 of Distribution should be overwritten with the information from Line 2 and Line 2 should be cleared.

** For all internal transfers of University monthly employees, every day of the month should be accounted for between the various distribution lines, so that the employee will be fully compensated for the month.*

Therefore, the transferring department may use a Sunday Stop Date on the Line 1 of distribution. For example, Jaime Rosas a 130085 - ASSISTANT MANAGER B in GSE is transferring to a 130390 - BUS ADMINISTRATOR B in Biology on the 16th of the month.

GSE should do Home ORG Transfer, changing his distribution Line 1 to have a Start Date of the first of the month and a Stop Date of the 15th.

Biology should add a Line 2 of distribution with a Start Date of the 16th and a Stop Date of the end of the Fiscal Year (06/30). The Begin Date and the Class Entry Date, entered by Biology, should be the 1st of the month.

After monthly payroll is run, Biology should do a Distribution Update, and overwrite Line 1 with the information from Line 2 (wipe out the information with GSE's COA) and clear the information from Line 2.

Transfer from a Monthly to a Weekly Position

In an effort to correctly pay employees who transfer from a monthly to a weekly paid position or department, the following is suggested:

- Whenever possible, begin a new job on the first of a month.

If not on the first of the month, an employee should move from a monthly to a weekly position on any day between the Monday **directly preceding** the monthly payroll run and the first day of the next month, and the following should occur:

- The monthly distribution line must be updated with the correct Stop Date before monthly payroll is run
- The job **must not** be transferred and updated until the Monday after the monthly payroll is run

Example:

Jennifer Abraham, a 355060 - SUPV ACCOUNTNG OPERATION in the Economics Department will transfer to a 525379 - OFFC ADMNST ASST B in the Psychology Department to begin on March 1, 2000.

Transferring Employees between Departments/Positions (continued)

The monthly distribution should be updated by the Economics Department to show a stop date of February 29th. The employee will receive a final monthly paycheck in the Economics Department in February if the start date in the new job is March 1st. The employee will receive the first weekly paycheck in the Psychology Department on March 10th if the start date is March 1st.

However, if the transfer takes place on or after March 20 (the Monday before March monthly payroll is run) up until the 1st of April, the monthly distribution should be updated by the Economics Department to show a correct stop date.

The Economics Department should not transfer the record to the History Department before March 20th. The Psychology Department should update the record to reflect the new pay distribution.

The employee will receive a final monthly paycheck in the Economics Department in March if the Start Date in the new job is March 20th or later. The employee will receive the first weekly paycheck in the Psychology Department on March 31st if the Start Date is in the week beginning March 20th.

Transfer from a Weekly to a Monthly Position

When an employee is going to transfer from a weekly to a monthly position, **it is best if the transfer occurs between the first of the month and the Friday before monthly payroll is run.** If the transfer does not occur by the Friday prior to the monthly payroll run, it should not occur until the 1st of the next month. While the person can physically begin a new job between the first of the month and the Friday before monthly payroll is run, in order for an employee to receive all prior weekly paychecks, the record should not be transferred and updated before the following Tuesday. ***All weekly payroll activities must occur before the transfer takes place.***

For example, Douglas Kelly, a 525379 - OFFC ADMNST ASST B, works in the LRSM. He will transfer to a new position as a 365108 - TRAINING SPECIALIST SR in the Financial Training Department in May. This changes his pay status from weekly paid to monthly paid.

The best day to transfer his record is for him to start the new position on Monday, May 1. His record should be transferred on or soon after May 2nd, in order for him to receive his last paycheck as a weekly paid employee for week ending April 30th.

However, in order for him to receive a monthly paycheck and all of his weekly paychecks, he can start the new position anytime up to and including May 12.

If Douglas's last day in LRSM is May 12th, and his first day in Financial Training is May 15th, his record should be transferred on Tuesday, May 16th, the day after the last weekly payroll is run for which he will receive pay.

After May 15th, the next available time for Douglas to transfer from LRSM to Financial Training is June 1st.

Task: Leave of Absence (LOA)

Task Definition: In this task, you will see how to record a leave of absence. Go to the following link for detailed steps on how to perform this task:

http://www.finance.upenn.edu/ftd/documentation/Enter_LOA.pps

For Leave of Absence w/o Pay – Worker’s Compensation

- Change Employee Status to indicate **On Leave of Absence without Pay**
- Change the Status Date to date of first absence related to the disability
- Change the Return from Leave Date (LOA Return DATE) to six months from the first absence related to the disability
- Select LOA Reason **Disability Worker’s Compensation Only (O1)**
- Update the Distribution
 - Stop salary distribution effective **seven calendar days** from the first absence related to the disability

Faculty

When entering the return date for a Leave of Absence (LOA) – Sabbatical, the date should be the month and year the faculty expects to return – not the date of the last month of leave. For example, if Professor Brown is taking sabbatical from 07/00 through 06/01, the LOA should be “07/01”. The month Dr. Brown returns to Penn.

Task: Terminate

Task Definition: In this task, you will see how to terminate an employee record. Go to the following link for detailed steps on how to perform this task:

<http://www.finance.upenn.edu/ftd/documentation/Terminate.pps>

All employees, faculty and students who will be terminated from PennWorks should submit a Letter of Resignation. In cases where this is not possible, a letter from the supervisor is required stating the date of termination.

Due to the necessary 'forwarding' information required for the University, Letters of Resignation should state the following:

- Date resignation is effective
- Forwarding home address and phone number
- Forwarding employment address and phone number (if available)
- Reason for resignation/type of employment to which the employee is going

Task: View Role Details

Task Definition: In this task, you will view a person's 'role' information. Go to the following link for detailed steps on how to perform this task:

http://www.finance.upenn.edu/ftd/documentation/View_Role_Details.pps

Task: Promotion/Demotion

Task Definition: In this task, you either promote or demote an employee. Go to the following link for detailed steps on how to perform this task:

<http://www.finance.upenn.edu/ftd/documentation/PromoteDemote.pps>

Task: Reappointment

Task Definition: In this task, you reappoint only a Faculty member. Go to the following link for detailed steps on how to perform this task:

<http://www.finance.upenn.edu/ftd/documentation/Reappoint.pps>

Task: Reclassification

Task Definition: In this task, you will see how to reclassify an employee record. Go to the following link for detailed steps on how to perform this task:

<http://www.finance.upenn.edu/ftd/documentation/Reclassify.pps>

The Supervisor or Principle Investigator may request reclassification of an employee. Requests for reclassification and all appropriate forms need to be sent to HR for their approval of any reclassifications of Type 1 Administrative and Technical/Professional employees and all Type 2 employees in your department. You will be contacted by an HR Compensation Specialist to discuss effective dates and salary. You will receive a letter from the HR Compensation Office stating the effective dates of the reclassification, the new Salary, Job Class Code, Position Inventory Number, etc. Once you receive this letter you can update the employee's on-line record.

See the Faculty Handbook for re-appointing or promoting faculty and Research Associates.

Refer to the Guide to Graduate Student and Post-Doctoral Appointments for reclassifications of Type 4 and 8 employees and (Type 9) Post-Doctoral appointees.

The Business Administrator has authority to approve any (non-union) Type 3 and type 5 appointments, excluding Work-Study students.

Work-Study reclassifications must be approved by the Student Employment Office.

Task: Role ORG Transfer

Task Definition: In this task, you can transfer a role to another ORG. Go to the following link for detailed steps on how to perform this task:

http://www.finance.upenn.edu/ftd/documentation/Role_ORG_Transfer.pps

Task: Role Update

Task Definition: In this task, you are able to update an employee's role. Go to the following link for detailed steps on how to perform this task:

http://www.finance.upenn.edu/ftd/documentation/Update_Role.pps

Task: Salary Increase/Decrease

Task Definition: In this task, you either increase or decrease an employee's salary. Go to the following link for detailed steps on how to perform this task:

http://www.finance.upenn.edu/ftd/documentation/Salary_IncDec.pps

Task: Add/Update Distributions

Task Definition: In this task, you can add, update or delete distributions. Go to the following link for detailed steps on how to perform this task:

http://www.finance.upenn.edu/ftd/documentation/AddUpdate_Dist.pps

Task: Add/Update External Distributions

Task Definition: This task represents payment to an employee from a source other than University of Pennsylvania Payroll. This payment offsets Penn's compensation commitment. Go to the following link for detailed steps on how to perform this task:

http://www.finance.upenn.edu/ftd/documentation/AddUpdate_External_Dist.pps

Task: Rehire

Task Definition: In this task, you can rehire a 'terminated or separated' employee. Go to the following link for detailed steps on how to perform this task:

<http://www.finance.upenn.edu/ftd/documentation/Rehire.pps>

Function: View Notifications

Function Definition: The Notifications function allows you, based on access rights, to view, filter, and sort actions taken in PennWorks. Go to the following link for detailed steps on how to perform this task:

http://www.finance.upenn.edu/ftd/documentation/View_Notifications.pps