Welcome to PennWorks Transition Training (2 of 3)

Use buttons to move forward, back or PAUSE the presentation.

Optional: Click icon to print slides

This presentation has no audio.
Web Training Tips

Navigation Tabs
- **Outline** and **Thumbnail** show your location in the training
- **Search** allows you to search through the training text

Presentation Controls
- Use buttons to play/pause or move forward or back through presentation

Web-Links
- On-screen links will open a separate browser window

You do not have to complete the course at one sitting; you may stop the PennWorks courses at any time and resume later. When you return, log in again, click **Enrolled** in the left toolbar, find the PennWorks course you would like to resume, and click **Start**. You will have the option to resume where you left off or start from the beginning.

Click the Slide Notes button to remove the slide outline and expand the presentation viewing area.
PennWorks Training Tips

This on-line course uses several techniques to present information or demonstrate PennWorks functionality

• Allow each slide to play in its entirety to view all the content

• Blue banners draw your attention to new Penn Works functionality
  – Refer to the PennWorks Glossary for further details
PennWorks Training Tips  (cont’d)

• Become familiar with these Training conventions:
  – Text bubbles contain information you need to know

    Important information about PennWorks is contained in gold text bubbles

  – A **You-Do-It** arrow and gold box/oval indicates an action that simulates functionality in PennWorks

  – A **click here** link on Task pages takes you into a specific PennWorks Task and advances you to the next screen
Tasks & Inbox

• Now that you have seen a glimpse of PennWorks, we will now step through some of the ‘tasks’ you may frequently be performing.

• Imagine you have an ‘Inbox’ on your desk. We’ll tackle each item in this inbox one at a time to demonstrate how to complete many of the tasks in PennWorks.

• Enjoy!
My Inbox/Outbox

- Find a Person
- Browse
- Update Bio Info
- Roles/Distribution
- Add/Update Distributions
- Add a Role
- Add a Person
- Transfer Home ORG
- LOA (Leave of Absence)
- Terminate

Click on **Find a Person** to learn how to search for an existing record
Task: Find a Person

Task Definition: Search for and retrieve existing payroll records.

In this task – Use a variety of search criteria to find an existing PennWorks record. To complete this task you will need to:
• Search by name or Penn ID #
• Refine your search by School/Center and/or ORG
• Select the appropriate record from a list of results

Steps – From the Navigation Panel:
• Select Find/Add a Person
• Enter search criteria
  • e.g. Name or Penn ID #
• Review the results
• Select the appropriate record from a list of results by selecting a Task
  • e.g. Browse

The Find a Person action is used as the first step for the Browse, Update, and Add a Person tasks.

To see this in PennWorks...click here
Task: Find a Person (cont’d)

- Find/Add Person is the first step in all Browse, Update, and Add tasks

Click Find/Add Person to perform a search and advance to the next screen
Assume that you enter the person’s Last Name and the first letter of their First Name
- You may chose to enter additional search criteria to further refine your search results
Task: Find a Person (cont’d)

Find/Add Person

Find a person: Search using appropriate criteria.

Add a person: Search first so that it can be confirmed that the person does not already exist in the system.

Click Browse to learn more about PennWorks and the Browse Task.

A list of matching results will be returned – further refine your search if necessary.
Find a Person
  - Browse
  - Update Bio Info
  - Roles/Distribution
  - Add/Update Distributions
  - Add a Role
  - Add a Person
  - Transfer Home ORG
  - LOA (Leave of Absence)
  - Terminate

Click on **Browse** to learn how to view a person

Inbox

Outbox
Task: Browse

Task Definition: In this task, you will view a person’s record.

In this task – View the same information as you did on the 003, 004, and 005 screens
• In PennWorks, once you have completed the ‘Find/Add a Person’ search, you can view an employee record from the Browse task

Steps – From the Task drop-down list:
• Select Browse
• View Results of Browse
  • Bio
  • Roles/Distributions
  • Compensation (Faculty only)

From the Browse task, you can also update the employee’s record by selecting from the Task drop-down list.

To see this in PennWorks...click here
From the Task drop-down list, select **Browse** and advance to the next screen.
Task: Browse (cont’d)

Click Return to Search Results to advance to the next Task.

Compensation Tab applies only to Faculty.
My Inbox/Outbox

✓ Find a Person
✓ Browse
  • Update Bio Info
  • Roles/Distribution
  • Add/Update Distributions
  • Add a Role
  • Add a Person
  • Transfer Home ORG
  • LOA (Leave of Absence)
  • Terminate

Click on **Update Bio Info** to learn how to update an employee
Task: Update Bio Info

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

In this task – Update the same information as you did in 020 Personal Info Update
• In PennWorks, once you have completed the ‘Find/Add a Person’ search, you can Update Bio Info for an ‘Active’ employee

Steps – From the Task drop-down list:
• Select Update Bio Info
• Update information as needed

FYI: From the Update Bio Info task, you can also tab to view/update Roles/Distributions.

To see this in PennWorks...click here
Task: Update Bio Info (cont’d)

From the Task drop-down list, select **Update Bio Info** to update the Bio screen and advance to the next screen.
Task: Update Bio Info (cont’d)

Update Bio data as needed

Click [Submit] to complete your work and to advance to the next Task
My Inbox/Outbox

- Find a Person
- Browse
- Update Bio Info
- Roles/Distribution
  - Add/Update Distributions
  - Add a Role
  - Add a Person
  - Transfer Home ORG
  - LOA (Leave of Absence)
  - Terminate

Click on **Roles/Distributions** to see the Task list here
Task: Roles/Distribution Tab

**Task Definition:** In this task, you will navigate to the Roles/Distribution Tab in order to process a variety of Role and Distribution activities or tasks.

**In this task – Update as you did in the 004 screen**
- In PennWorks, once you have completed the ‘Find/Add a Person’ search, you can perform these tasks for an ‘Active’ employee
  - View Role Details
  - Promotion/Demotion
  - Reappointment
  - Reclassification
  - Role ORG Transfer
  - Role Update
  - Salary Increase/Decrease
  - Add/Update Distribution
  - Add/Update External Distributions

**Steps – From the Task drop-down list:**
- Select **Roles/Distributions**
- From the **Roles Summary** page, select the desired task for the appropriate Role

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**F.Y.I.**
You can also **View Role Details** for a terminated employee

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**To see this in PennWorks...click** [here](#)
From the Task drop-down list, select **Roles/Distributions** to advance to the next screen.
From the **Roles Summaries** drop-down list, select the desired Task for the appropriate Role (e.g. View Role Details)
My Inbox/Outbox

✓ Find a Person
✓ Browse
✓ Update Bio Info
✓ Roles/Distribution
  • Add/Update Distributions
  • Add a Role
  • Add a Person
  • Transfer Home ORG
  • LOA (Leave of Absence)
  • Terminate

Click on Add/Update Distributions to perform this Task
Task: Add/Update Distributions

Task Definition: In this task, you can add, update or delete distributions.

In this task – Update the same information as you did in 019 Distribution Update
• In PennWorks, once you have completed the ‘Find/Add a Person’ search, you can select the Add/Update Distributions from the Roles/Distributions tab

Steps – From the Task drop-down list:
• Select Add/Update Distributions
• Add/update Distributions as required
  • Account Number
  • ERN
  • Per Amt (Salaried Only)
  • Percent (Hourly Only)
  • Start
  • Stop

The user has the option to display distributions for a range of fiscal years specified on this screen.

To see this in PennWorks...click here
Task: Add/Update Distributions (cont’d)

- From the Roles Summaries drop-down list, select Add/Update Distributions

Click Add/Update Distributions to advance to the next screen
**Task: Add/Update Distributions (cont’d)**

**Update Distributions as required; click [Submit] to complete and advance to the next Task.**

**Add Distributions**

- **[Add Distributions]** is used to add new Distribution lines; a maximum of 32 active Distributions can be added across all Roles.

- **New**

<table>
<thead>
<tr>
<th>Description</th>
<th>Role Org</th>
<th>Annual Amount</th>
<th>Start</th>
<th>End</th>
<th>Open-ended</th>
<th>Monthly Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>BUS ADMINISTRATOR B</td>
<td>4638 ID-INSTITUTE FOR DIABETES, OBE</td>
<td>$60,000.00</td>
<td>09/30/2009</td>
<td>✓</td>
<td></td>
<td>$5,000.00</td>
</tr>
</tbody>
</table>

**Note the ability to delete errors or disable expired distributions.**

**New**

- Users can click on [Set] to **Show distributions during fiscal year(s)**.
- Distributions can be either **Final** or **Projected**.
  - **Projected** is for planning purposes only and does not pay an employee.
My Inbox/Outbox

- Find a Person
- Browse
- Update Bio Info
- Roles/Distribution
- Add/Update Distributions
  - Add a Role
  - Add a Person
  - Transfer Home ORG
  - LOA (Leave of Absence)
  - Terminate

Click on Add a Role to learn how to add roles to an employee
Task: Add a Role

Task Definition: In this task, you can add additional roles to an existing employee’s record.

In this task – Update the same information as you did in 017 Job Assignment Add
• In PennWorks, once you have completed the ‘Find/Add a Person’ search, you can Add a Role to an ‘Active’ employee

Steps – From the Roles/Distributions Task drop-down list:
• Select Add a Role
• Add role information as required
• Add Distributions accordingly
  • See the Add/Update Distributions task for details

The Home ORG PennWorks user may set a flag that locks or ‘freezes’ non-Home ORG PennWorks users from adding new roles. To add a new role to a locked employee, the hiring ORG will have to contact the Home ORG. An unchecked box means that non-Home ORGs may add roles.

To see this in PennWorks...click here
Task: Add a Role (cont’d)

Click Add a Role to advance to the next screen.
Task: Add a Role (cont’d)

Add Role details as required

Role State can be Final or Projected; a ‘Projected’ Role State is used for planning purposes and is not sent to the HR/Payroll system until it is set to ‘Final’

New Term impacts the per amount calculation for salaried employees

Open-ended replaces the use of 99/99/99 for the End Date

[Add Distributions] allows you to add a distribution. See Add/Update Distribution task for more specific information.

Click [Submit] to complete and advance to the next screen
My Inbox/Outbox

- Find a Person
- Browse
- Update Bio Info
- Roles/Distribution
- Add/Update Distributions
- Add a Role
  - Add a Person
  - Transfer Home ORG
  - LOA (Leave of Absence)
  - Terminate

Click on **Add a Person** to learn how to process a new hire
Task: Add a Person

**Task Definition:** In this task, let’s enter a new hire into PennWorks.

**In this task** – Enter the same information you entered on the 003, 004, and 005 screens, i.e. 001 Initial Employment

- In PennWorks, the 003 and 005 screens have been combined into Biographical Information
- The information from the 004 screen is now entered in the Add a Role and Add Distribution tasks

**Steps** – From the Navigation panel:

- Complete the Find a Person search
- Register Penn ID
- Add Biographical info
- Add Role(s)
- Add Distribution(s)
- Add Compensation (Faculty only)
- Add Ethnicity
- Finalize and Save

Before adding a new person, you must first search the existing database for a match, i.e. Find a Person. Please refer to the Find a Person section for details.

To see this in PennWorks...click [here](#)
**Task: Add a Person (cont’d)**

**Find/Add Person**

**Find a person:** Search using appropriate criteria.

**Add a person:** Search first so that it can be confirmed that the person does not already exist in the system.

<table>
<thead>
<tr>
<th>Last Name</th>
<th>Merton</th>
<th>Home School/Center</th>
<th>Select...</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Thomas</td>
<td>Home ORG</td>
<td>Select...</td>
</tr>
<tr>
<td>Penn ID</td>
<td></td>
<td>Home School/Center or ORG Text</td>
<td></td>
</tr>
<tr>
<td>Employment Status</td>
<td>Select...</td>
<td></td>
<td>Find</td>
</tr>
</tbody>
</table>

If the person is not found in the results listing below or there are no results at all, click **Add a New Person**.

No records found.

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*Click on [Add a New Person] to begin the new hire process and advance to the next screen.*

*After clicking [Find], note the message 'No records found'. Click on [Add a New Person] to begin the new hire process and advance to the next screen.*
For an individual who has applied for a SSN, their receipt of application can be used to request a Temporary Number. Fax a copy of this ‘receipt’ to HR Records. HR will provide a temporary number that can be used in place of the SSN.

To register a Penn ID, enter **Name**, **Birth Date** and **Social Security Number**

- A Penn ID number will be assigned automatically

Click on [Register Penn ID data] to advance to the next screen
Users will be asked to specify whether an employee is a **Foreign National**, a **US Citizen**, or a **Green Card / Permanent Resident**. This field will be required for new hires and rehires, and optional but strongly recommended for biographical updates to existing employees. If **Foreign National** or **Green Card/Permanent Resident** is selected, the user will be required to enter Visa information whether the person is new or existing.

Click on [Submit] to advance to the next screen.
Decide if only Home ORG users will be able to add a Role.

Select the School/Center, Role ORG and enter the Job Class Code.

Clicking [Search] after entering the Job Class Code allows you to continue adding Role details.

Role State can be Final or Projected; a 'projected' Role State is used for planning purposes only, i.e. the employee will not receive a payment.

Open-ended replaces the use of 99/99/99 for the End Date.

Now that you’ve finished adding Role and Distribution data, click [Next] to advance to the next screen.
• Faculty Compensation is intended to capture the salary commitment for Standing Faculty, Associated Faculty, and Health System Clinicians regardless of the academic appointment.
Add Person :: Ethnicity/Race Information (Step 4 of 5)

You may enter race/ethnicity data for this person, but it is not required.

You MUST answer this 'ethnicity' question.
However, it is optional to enter any of the detailed ethnicity information that appears after you click on 'Yes'.

Ethnicity*

Is this person Hispanic or Latino?
- Yes  
- No

You MUST also answer this 'Race' question.
However, it is optional to enter any of the additional, more detailed race information that appears after you click on an upper level checkbox.

Race*

Please select one or more of the following races. Is this person...
- American Indian or Alaska Native? (including all Original Peoples of the Americas)
- Asian? (including Indian subcontinent and Philippines)
- Black or African American? (including Africa and Caribbean)
- Native Hawaiian or Other Pacific Islander? (Original Peoples)
- White? (including Middle Eastern)

Answer the Ethnicity question
Select the appropriate Race
Click on [Next] to advance to the next screen
Task: Add a Person (cont’d)

Click on [Submit] to finalize and advance to the next Task

- Upon completion, finalize the Add Person process
My Inbox/Outbox

- Find a Person
- Browse
- Update Bio Info
- Roles/Distribution
- Add/Update Distributions
- Add a Role
- Add a Person
  - Transfer Home ORG
  - LOA (Leave of Absence)
  - Terminate

Click on Transfer Home ORG to learn how to transfer a record
Task Definition: In this task, you will see how to transfer an employee record to another Home organization.

In this task – Update the same information as you did in 010 Home ORG Transfer
• In PennWorks, once you have completed the ‘Find/Add a Person’ search, you can transfer the home organization for an ‘Active’ employee

Steps – From the Task drop-down list:
• Select Transfer Home ORG
• Review the Roles/Distributions and make adjustments as needed
• Change the Home School/Center and Organization to the new one

The transferring organization can enter the new phone number for the transferee; this is optional however.

To see this in PennWorks...click here
Task: Transfer Home ORG (cont’d)

From the Task drop-down list, select **Transfer Home ORG** and advance to the next screen.
Review and adjust Role(s) as needed

Review and adjust Distribution(s) as needed

Click **[Next]** to advance to the next screen
Task: Transfer Home ORG (cont’d)

Step 2: Choose New Home ORG, Confirm Role Adjustments, and Finalize

After you have entered the new Home ORG information and confirmed any Role/Distribution adjustments, click the 'Submit' button at the bottom of this screen to save/finalize your data. Make sure you have entered the new Mail Code and work phone number (Work 1).

If you wish to make any revisions or corrections to the data displayed here, click on the 'Previous' button until you see the original data entry screen for your correction. Make the correction and then click 'Next' until you return to the 'Finalize' screen and click 'Submit'. You will not lose any of the information that you have already entered.

- Change the **School/Center**, **ORG**, and **Mail Code**, and **work phone** (if known)

- Click **[Submit]** to complete this Task and advance to the next Task
My Inbox/Outbox

- Find a Person
- Browse
- Update Bio Info
- Roles/Distribution
- Add/Update Distributions
- Add a Role
- Add a Person
- Transfer Home ORG
  - LOA (Leave of Absence)
  - Terminate

Click on **LOA** to learn how to record a Leave of Absence
Task: LOA (Leave of Absence)

Task Definition: In this task, you will see how to record a leave of absence.

In this task – Update the same information as you did in 002 and 003 LOA With/Without Pay
- In PennWorks, once you have completed the ‘Find/Add a Person’ search, you can record a LOA for an ‘Active’ employee

Steps – From the Task drop-down list:
- Select LOA
- Select the Status
  - On Leave With Pay
  - On Leave Without Pay
- Enter the Effective Date
- Enter the Return Date
- Enter the LOA Reason

From the LOA task, you can also view/update Roles/Distributions.

To see this in PennWorks...click here
From the Task drop-down list, select **LOA** and advance to the next screen.
Enter Effective and Return dates and LOA Reason and click [Submit] to advance to the next Task.
My Inbox/Outbox

- Find a Person
- Browse
- Update Bio Info
- Roles/Distribution
- Add/Update Distributions
- Add a Role
- Add a Person
- Transfer Home ORG
- LOA (Leave of Absence)
  - Terminate

Click on **Terminate** to learn how to terminate a record
Task: Terminate

Task Definition: In this task, you will see how to terminate an employee record.

In this task – Update the same information as you did in 005 Separation/Termination

- In PennWorks, once you have completed the ‘Find/Add a Person’ search, you can terminate an ‘Active’ employee

Steps – From the Task drop-down list:
- Select Terminate
- Enter the ‘Effective’ termination date
- Enter the ‘Termination Reason’

Users can now mark a person as terminated at a future date but continue to edit the person’s record until that termination date actually arrives. Remember to update Distributions as appropriate.

To see this in PennWorks...click here
Task: Terminate (cont’d)

Click on **Terminate** to advance to the next screen.
From the Bio screen, enter the appropriate termination date and reason.

Click [Submit] to complete this Task and advance to the next Task.
Quiz Instructions

• The following slide will link directly to an online quiz.
• If you would like to review the material before proceeding to the quiz, use the navigation bar on the left to return to a specific topic or page.
• All questions must be answered correctly for successful completion.
• You may retake the quiz as needed, however you must close the current session and start the course again.

Use the navigational controls below when you are ready to proceed to the quiz.
DRAG & DROP: What citizenship data is required for all new employees in PennWorks?

- Whether the employee is a Foreign National, a US Citizen, or a Green Card / Permanent Resident.
- Driver's license or state-issued identification number
- The employee's passport information (issuing country and expiration).

PROPERTIES
On passing, 'Finish' button: Close Window
On failing, 'Finish' button: Goes to Previous Slide
Allow user to leave quiz: After user has completed quiz
User may view slides after quiz: At any time
User may attempt quiz: Unlimited times