UPGRADE COMPLETE

The BEN Financials application was upgraded on November 26, 2012. This upgrade was required in order to keep current with the latest vendor software and for back-end application support.

Access

Access to BEN Financials is the same as before the upgrade. Users only need to authenticate with their BEN Financials usernames and passwords before accessing the system with a supported web browser.

Password Reminder

Increased requirements for password security go into effect the first time your password expires after the upgrade. When you are prompted to change your password, the new requirements will be as follows:

- Passwords must be a minimum of 8 characters
- Must include at least one uppercase letter, one lowercase letter, and one number
- Password must not contain repeating characters

For more information, please see the BEN Financials Passwords page at:
http://www.finance.upenn.edu/ben/benfin/security_access/passwords.shtml

Additionally, there is a new streamlined procedure to reset a forgotten password. For more information, please see the password reset document at:
http://www.finance.upenn.edu/ben/docs/BEN_PasswordChange.pdf

UPDATE ON PENN TRAVEL & EXPENSE MANAGEMENT (TEM) SYSTEM

The University has initiated a project to streamline the travel booking and travel & entertainment expense reimbursement processes for faculty, staff, and students conducting University business. The Travel & Expense Management (TEM) team has been working with Concur, a leading vendor of travel booking and expense management systems, to configure an online expense management solution for the Penn environment. An advisory group has also been convened to help guide this process to ensure that the online system accommodates School and Center practices while adhering to University policy.

The new TEM system will offer a number of benefits to the University community including:

- Streamlined electronic process for the submission, review, approval, and payment of expense reports;
- Shorter cycle times for reimbursement;

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End-User Support and Reference Materials

The BEN Financials team is poised to support users during this transitional period. For help, use any of the following methods:

- **Reference Materials**—Reference materials have been updated and are available on the web at [http://www.finance.upenn.edu/ftd/documentation.shtml](http://www.finance.upenn.edu/ftd/documentation.shtml) (see the BEN Financials section)

- "Noted Differences" document—Highlights the key new features and changes of the upgraded system at [http://www.finance.upenn.edu/ben/benhelps/R12_Noteds_Differences_Final.html](http://www.finance.upenn.edu/ben/benhelps/R12_Noteds_Differences_Final.html)

- **BEN Knows**—Searchable knowledge base at [http://www.finance.upenn.edu/benknows/](http://www.finance.upenn.edu/benknows/)

- **Online Help**—Users may enter a ticket via BEN Helps online support at [http://BENHelps.finance.upenn.edu](http://BENHelps.finance.upenn.edu)

- **Help Line**—Users may call the BEN Helps line at 6-HELP (215-746-4357)

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**UPGRADE COMPLETE**

**Continued from the previous page**

**UPDATE ON PENN TRAVEL & EXPENSE MANAGEMENT (TEM) SYSTEM**

**Continued from the previous page**

- Integration with Penn-sponsored credit card - reducing manual entry of expense data and enabling direct payment to the credit card company for approved expenses;
- The ability for designated individuals to book travel and prepare expense reports on behalf of others;
- Robust reporting and expense tracking;
- Applications available for mobile devices;
- Improved compliance with University policies - business rules are built into the system;
- Ability for students to access the system when traveling for Penn; and
- Optimal spend aggregation and improved rate negotiations with University providers.

Testing of the system by a selected pilot group will begin early in 2013 with the project expected to be fully implemented by early FY14.

This project is jointly sponsored by the Divisions of Business Services, Finance, and Information Systems and Computing. Please address any questions about the project to the project team at: ASKTEM@LISTS.UPENN.EDU.

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**REVIEWING YOUR PENN PEOPLE DATA**

The University of Pennsylvania is committed to rising from excellence to eminence through the efforts of a talented and diverse workforce. As a federal contractor, Penn has affirmative action programs for covered veterans, people with disabilities, women and minorities. The Office of Affirmative Action and Equal Opportunity Programs coordinates and oversees these programs. The University is required to report on the ethnicity/race and sex of its employees and to offer people with disabilities and covered veterans the opportunity to voluntarily self-identify. Annually, we ask you to assist us in meeting Penn’s federal reporting and compliance responsibilities by reviewing and updating your demographic information in [Penn People](http://www.finance.upenn.edu/ben/benhelps/R12_Noteds_Differences_Final.html).

If you are a person with a disability or are a covered veteran as defined by law, we invite you to self-identify. Self-identification of your disability or veteran status is strictly voluntary. You may self-identify at any time while you are employed by the University. Those who self-identify, or elect not to do so, will not be subjected to any adverse treatment. To self-identify, please complete the survey which can be found in [Penn People](http://www.finance.upenn.edu/ben/benhelps/R12_Noteds_Differences_Final.html). This information is maintained separate from an individual’s personnel file and is held in strict confidence.

In addition to our legal compliance obligations, Penn has as an essential part of its mission a commitment to diversity of our faculty and staff. Accurate information helps the University to evaluate the success of programs striving to diversify our faculty and staff and provide a supportive climate for all students, staff, and faculty. If you have questions or need additional information, please contact the Office of Affirmative Action and Equal Opportunity Programs at 215-898-6993.

Also, please review and update the information regarding your educational attainment in [Penn People](http://www.finance.upenn.edu/ben/benhelps/R12_Noteds_Differences_Final.html). In addition, please review and update your home address, emergency contact information, and job information through the [My Profile](http://www.finance.upenn.edu/ben/benhelps/R12_Noteds_Differences_Final.html) page of U@Penn.

In addition, please take this opportunity to review your contact information in the online Penn Directory and make any necessary changes. Ensuring that your contact information is current will allow you to receive notifications from the UPennAlert Emergency Notification System as well as to allow your colleagues to reach you to conduct University business. You can access your directory information from "update directory listings". Please direct any questions regarding the directory to [penncommda@isc.upenn.edu](mailto:penncommda@isc.upenn.edu).

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**Bottom Line**  December 2012
**News from Payroll Tax Re: Treaty Exemptions**

Treaty exemptions are granted on a calendar year basis and therefore must be renewed each January. Please advise all **monthly paid** individuals who believe they are entitled to an exemption from Federal taxes to report to the Payroll Tax Office. These individuals must bring proper identification to confirm their eligibility and sign the appropriate Tax Treaty documents for the 2013 tax year. They should also bring their most current immigration document with them. Please note that we are unable to provide treaty benefits to **weekly paid** individuals.

In order to meet the deadline for the January 2013 payroll, employees must visit the Payroll Tax Office by Thursday January 17, 2013. If they do not meet the January deadline they may still apply for the exemption, however the treaty benefits will not take effect until February. Please note that Payroll will **not refund the Federal Withholding Tax** for individuals who missed the January 2013 deadline. The individual can claim the exemption when filing their 2013 tax return.

Please forward this message to any individual within your department that this may affect and call the Payroll Tax Department at 898-6573, 898-7792 or 898-1543 with any questions or concerns.


We are pleased to announce effective October 23, 2012 all off cycle payments (commonly referred to as manual checks) will now be processed via Direct Deposit or the TotalPay® Card system. Faculty, staff and students will no longer need to walk to the Payroll Office to pick up a paper check. The pay information will be available on the U@Penn Portal (“My Pay” in the Payroll and Tax section) within 24 hours of the payment.

If an individual has Direct Deposit, the off cycle payments will be deposited to that account. Otherwise, the payments will either go to the individual’s existing TotalPay® Card account or a new TotalPay® Card account will be established if needed.

For the Business Administrators and Payroll Coordinators, the procedures for requesting off cycle payments remain the same as the current procedures.

If there are any questions, please contact the Payroll Department at 215-898-6301 or payroll@exchange.upenn.edu.

**New IDS Payment Process!**

All payments to faculty, staff and students will be issued via Direct Deposit or the TotalPay® Card system. If you require payment via check for study advances (Object Code 5317) please reference “check only” on the C-Form. The check will be issued to the Department for that individual.
**Weekly Closing Schedule**

<table>
<thead>
<tr>
<th>Pay Period</th>
<th>Weekly Pay Date</th>
<th>Supporting Documents for New Appts must Reach HR Records by 5 PM</th>
<th>Additional Pay Due in Payroll by 5 PM</th>
<th>Time Reporting by 3 PM</th>
<th>Database Changes to Existing Records before 5 PM</th>
</tr>
</thead>
<tbody>
<tr>
<td>26-Nov-02-Dec</td>
<td>07-Dec</td>
<td>26-Nov</td>
<td>30-Nov</td>
<td>03-Dec</td>
<td>03-Dec</td>
</tr>
<tr>
<td>03-Dec-09-Dec</td>
<td>14-Dec</td>
<td>03-Dec</td>
<td>07-Dec</td>
<td>10-Dec</td>
<td>10-Dec</td>
</tr>
<tr>
<td>10-Dec-16-Dec</td>
<td>18-Dec</td>
<td>05-Dec</td>
<td>11-Dec</td>
<td>12-Dec</td>
<td>12-Dec</td>
</tr>
<tr>
<td>17-Dec-23-Dec</td>
<td>19-Dec</td>
<td>10-Dec</td>
<td>14-Dec</td>
<td>17-Dec</td>
<td>17-Dec</td>
</tr>
</tbody>
</table>

***January 4th, 2013 payroll*** – Please note that this payroll (for period ending 12/30/12) will run on Wednesday, 01/02/13

**Monthly Closing Schedule**

<table>
<thead>
<tr>
<th>Pay Period</th>
<th>Monthly Pay Date</th>
<th>Supporting Documents for New Appts must Reach HR Records by 5 PM</th>
<th>Additional Pay Due in Payroll by 5 PM</th>
<th>Time Reporting by 4 PM</th>
<th>Database Changes to Existing Records before 5 PM</th>
</tr>
</thead>
<tbody>
<tr>
<td>01-Dec-31-Dec</td>
<td>19-Dec</td>
<td>07-Dec</td>
<td>12-Dec</td>
<td>13-Dec</td>
<td>14-Dec</td>
</tr>
</tbody>
</table>

Payroll 2012 Year End Dates

Off Cycle Payments

The last payroll for 2012 will be run on 12/17/12. As we all prepare to leave for winter break we will strive to process all payment requests within a 3 day window (not the normal 3 to 5 day).

We will continue to accept payment requests through 5:00 p.m. on 12/18/12. We ask that you inform your employees not to call the Payroll Office for an update. Payments will be via Direct Deposit or the TotalPay® Card system.

Overpayments

All overpayments must be communicated to the payroll office by 12/18/12. Overpayments received by the Payroll Office after this date will be considered “prior year” overpayments and will have further tax implications to the employee.

All overpayments must be paid in full by 01/04/13 – checks can be submitted and should be made payable to the Trustee's of the University of Pennsylvania and forwarded to the Payroll Office for priority handling. If an employee is writing a check it must be for the full amount of the overpayment. No partial payments will be accepted.

Overpayments recovered in the following year (after 01/04/13 deadline) will have further tax implications to the employee.

Void Checks

All checks that should not have been issued and need to be voided in the payroll system must be returned to the payroll office no later than 12/17/12. If they are not returned before W-2s are processed the employee’s W-2 will be overstated and a W-2c will be required.

W–2 Mailing: Is Your Address Up–To–Date?

The calendar year is drawing to a close which means that it will soon be time to start thinking about tax returns. Penn mails your W-2 to your permanent address in January of each year, and if your permanent address is not up to date in our payroll system, your W-2 may be delayed or even lost.

Please Note: Your W-2 will be sent to your permanent address. If you have no permanent address on file in the payroll system your W-2 will be sent to your current address.

To view and/or change your address information, go to the U@Penn website at www.upenn.edu/u@penn or contact your Business Administrator.

Again, your address must be updated no later than January 4, 2013.

Foreign National Social Security Numbers

If you were issued a temporary Social Security number from the University of Pennsylvania upon your hire and have now been assigned a valid Social Security number, you must provide Human Resources with this updated information. If you haven’t already done so, please bring a copy of your Social Security card to Human Resources at 3401 Walnut St, 5th Floor, by 12/14/12 between the hours of 9:00 a.m. and 4:00 p.m. Continued on the next page
Payroll Tax Changes for 2013

Please be advised of the following tax changes for the year 2013:

- Social Security taxable wage base $113,700.00
- Medicare tax rate - increases from 1.45% to 2.35% on wages earned over $200,000. The employer is required to withhold an additional Medicare tax at the point in the pay period when an employee’s annual wages exceed $200,000.

Possible Rate Change 2013

- Social Security tax rate - The Temporary Payroll Tax Cut Continuation Act of 2011 reduced the Social Security payroll tax rate by 2% (from 6.2% to 4.2%) on the portion of the tax paid by the worker through the end of February 2012. The Middle Class Tax Relief and Job Creation Act of 2012 extended the reduction through the end of 2012. Under current law, this temporary reduction expires at the end of December 2012. If this Act is not extended the Social Security tax rate will change back to 6.2% beginning in January 2013.

Payroll Coverage For Winter Break

The Payroll Office will be staffed over the Winter Break to take phone calls and respond to emails only as follows:

<table>
<thead>
<tr>
<th>Day</th>
<th>Date</th>
<th>Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mon.</td>
<td>12/24/12</td>
<td>Closed</td>
</tr>
<tr>
<td>Wed.</td>
<td>12/26/12</td>
<td>9:00 a.m. – 1:00 p.m.</td>
</tr>
<tr>
<td>Thurs.</td>
<td>12/27/12</td>
<td>9:00 a.m. – 1:00 p.m.</td>
</tr>
<tr>
<td>Fri.</td>
<td>12/28/12</td>
<td>9:00 a.m. – 1:00 p.m.</td>
</tr>
<tr>
<td>Mon.</td>
<td>12/31/12</td>
<td>Closed</td>
</tr>
</tbody>
</table>

Please note: There will be no Payroll Office window hours.

Individual Disbursement Services (IDS) Year End Processing Dates

The following are the year-end processing cut-off dates for the IDS Office. In order to ensure that your requests are processed before the end of the year we are requesting you submit all requests by the dates listed below.

- Wednesday, December 12, 2012 at 5:00 p.m. to be processed before December 31, 2012:
  - C-forms
  - Travel Reimbursements
- Tuesday, December 18, 2012 at 2:00 p.m. to be processed before December 21, 2012:
  - Will Calls

IDS Coverage for Winter Break

The IDS office will be staffed over the Winter Break to take phone calls and respond to emails only as follows:

<table>
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<tr>
<th>Day</th>
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<tbody>
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<tr>
<td>Thurs.</td>
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<td>9:00 a.m. – 1:00 p.m.</td>
</tr>
<tr>
<td>Fri.</td>
<td>12/28/12</td>
<td>9:00 a.m. – 1:00 p.m.</td>
</tr>
<tr>
<td>Mon.</td>
<td>12/31/12</td>
<td>Closed</td>
</tr>
</tbody>
</table>

Please note: There will be no IDS window hours.*

*If you have an emergency you may call the office during office hours.

IDS Tips

- The IDS office is open daily from 10:00 a.m. until 2:00 p.m.
- Will Call requests are for study participants, awards, honorariums and payments required at the time of service.
- Will Call checks should be picked up within 3-5 business days
Accounts Payable

YEAR-END CUT-OFF DATES

The following are the year-end processing cut-off dates for the AP Office. In order to ensure requests are processed before the end of the year, we are requesting you submit all requests by the dates listed below.

Requests submitted after these dates may still be processed before the end of the year, however, due to the increased volume of requests we receive during this time we cannot guarantee they will be processed. The dates are as follows:

Wednesday, December 12, 2012 at 5:00 p.m. to be processed before December 31, 2012:
- C-Form & Purchase Order invoices
- Request Final Closing of PO’s
- Requests to correct and reverse receipts

Tuesday, December 18, 2012 at 2:00 p.m. to be processed before December 21, 2012:
- Will Calls

AP COVERAGE FOR WINTER BREAK

The AP office will be staffed over the Winter Break to take phone calls and respond to emails only as follows:

<table>
<thead>
<tr>
<th>Day</th>
<th>Date</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mon</td>
<td>12/24/12</td>
<td>Closed</td>
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<tr>
<td>Wed</td>
<td>12/26/12</td>
<td>Closed</td>
</tr>
<tr>
<td>Thurs</td>
<td>12/27/12</td>
<td>8:00 a.m. – 12:00 p.m.</td>
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<tr>
<td>Fri</td>
<td>12/28/12</td>
<td>8:00 a.m. – 12:00 p.m.</td>
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<tr>
<td>Mon</td>
<td>12/31/12</td>
<td>8:00 a.m. – 12:00 p.m.</td>
</tr>
</tbody>
</table>

Please note: There will be no AP window hours.*
*If you have an emergency you may call the office during office hours.

AP TIPS

- A/P is open daily from 10:00 a.m. - 2:00 p.m.
- A re-issued check will be issued as it was originally requested. Please do not request will calls for reissued checks.
- Please allow 30 days before submitting a stop/reissue request if the check was mailed to the correct address.
- Will Call requests are for deposits, conference registrations, Department of Homeland Security, and payments that are required at the time of service. Will Calls are not for services that have already been provided or past due invoices.
- Please place Will Call requests in the bin inside the AP office. Please do not place them in the drop box (1st fl Franklin Bldg) or the mail slot (outside the AP office). Failure to place them inside the office bin can result with your request being processed as a regular request.
- Please have a valid Penn I.D. when picking up Will Call checks. Guest cards are not honored as valid Penn I.D.
- Attachment requests are for documents that must accompany the check (utility bills, membership dues, etc.)
- Foreign Draft requests should reference the currency in which the draft is to be issued.

W-9’s for LLC vendors must reference the tax classification. Any W-9 submitted without the tax classification will be rejected.

Invoices should be sent directly to Accounts Payable. Vendors should not be emailing invoices to the Accounts Payable e-mail box apsup@exchange.upenn.edu. This e-mail address is for payment related questions and issues.

Utility bill such as Verizon and AT&T should not have Accounts Payable’s address listed as the bill to address. AP should not be receiving these invoices directly from the vendor. When AP receives these bills they are unable to distinguish what department these invoices belong.
As we approach year-end, please be advised of the following closing guidelines for gifts.

**December 31 Gift Date end of year processing:**

- **January 14:**
  - Last date to deliver to Gifts Accounting & Administration December 2012 – FY13 gifts (need December 31 postmark) IRS rules require that year-end gifts be postmarked on or before December 31, 2012
  - Last date to submit adjustments for year-end processing
- **January 15, 16, 17:** Gifts Office will close for year-end processing
  - Should you receive a $100,000 + check in January, we will of course deposit and process during this time period
- **January 18:** Gifts Office will reopen for deliveries
- **January 22:** Begin preliminary reporting

Gifts will be processed with a December 31 gift date, so long as they are postmarked on or before December 31, 2012. Therefore, it is imperative to send fully completed gift transmittals and backup information, including postmarked envelopes, to Gifts Accounting & Administration (GAA) for December 31 gift date processing as quickly as possible.

**All December 31 postmarked donations must be received in Gifts by Monday, January 14, 2013.**

Notify Jean Suta or Irma Lerma in Securities Gifts (jeanie@.upenn.edu) or 8-7254 of any securities gifts as soon as you are made aware of them. Securities gifts must be transferred into a Penn brokerage account by noon on December 31.

Should you have any questions on this information, contact Cassie Bartelme (8-3104), Maria Perkins (8-8687) or Jean Suta in the Treasurer’s Office.

### Making History Campaign - Campaign Credit

Cash gifts to the Making History Campaign will be processed following IRS regulation. All gifts received on or before December 31st, 2012 will be given Campaign Credit. Commitments will be given Campaign Credit in the event that the Gift Agreement was initiated and signed by the appropriate University official by December 31, 2012, and is signed and returned by the donor with a postmark no later than January 11, 2013.

Donors in current pledge payment schedules that include a payment scheduled in calendar 2013 and who wish to make an additional major gift to the Campaign and receive Campaign credit, must make their standard commitment by 12/31/12 and the first pledge payment toward the additional commitment by 12/31/14. Exceptions to these guidelines will only be considered with the Vice President of Development’s approval.

### Records and Gifts Accounting & Administration and Security Gifts Winter Break Schedule

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<tr>
<th>Date</th>
<th>Monday</th>
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<th>Tuesday</th>
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<td>Dec. 24</td>
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<td>Dec. 25</td>
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<td>Dec. 26</td>
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<td>9:00 – 3:00</td>
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<td>Dec. 27</td>
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<td>9:00 – 3:00</td>
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<td>Dec. 30</td>
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<td>9:00 – 1:00</td>
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<td>Jan. 1</td>
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<td>9:00 – 1:00</td>
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<td>Jan. 2</td>
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*The Bottom Line December 2012*
From the Cashier’s Office

Re: Petty Cash Travel, Facilities & Student Advances

Please note that the Cashier’s Office disburse cash between the hours of 9:00 a.m. and 3:00 p.m., with the exception of Tuesday we open at 10:00 a.m. Although we are here until 4:30 p.m. every day, disbursements are pulled at EXACTLY 3:00 p.m. Disbursements are sent to another area for reconciliation. Please allow yourself enough time to be here before 3:00 p.m. Please have all paperwork fastened with a clip or stapled. The forms do not stay here, they are sent to Accounts Payable.

All replenishment forms (the top form) must be typed. We cannot accept hand written forms. You also cannot white out or cross out and initial on these forms. Please be sure to double check this information. Often, when petty cash is being picked up, this information is not filled out properly. When this happens a new form must be completed.

Petty cash and Student Advances will not be disbursed without a Penn Card. We cannot accept any other form of ID for these disbursements.

Thank you for your cooperation.

Tammy DeSalis, Manager
Cashier’s Office
3451 Walnut Street
215-898-7258
desalis@upenn.edu

Quarterly Quiz

Instructions: The following questions can be answered based solely on information contained in this issue of The Bottom Line.
To participate in the contest, please submit your answers via email to training@exchange.upenn.edu no later than February 1, 2013

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

1. List the website used to check on an eForm.
2. What is the 2012 cutoff date for C-Forms and Travel Reimbursements?
3. Which office(s) is open from 8:00 a.m. – 12:00 p.m. on December 28, 29 & 30th?
4. What is the last day to visit the Payroll Office for a Tax Treaty Exemption?
5. What is the last day to update your address for the 2012 W-2’s?

Last Quarter’s Winner:
Shannon Freitas
Senior Business Administrator
Institute of Contemporary Art
Congratulations!

Did You Know...

...Since the BEN Financials upgrade, if you receive an error when attempting to create a requisition in BEN Buys, the error is a result of not having a default ‘Deliver-To Location’ saved in the User Profile. To prevent this error, please follow the steps provided below to set a default ‘Deliver-To Location’.

- From the ‘Requisitioner’ responsibility, go to Requisitions Home Page
- Click on User Preferences link at the top
- Click the My Profile link
- Under the Delivery section, enter a default location in the Deliver-To Location field
- Click [Apply]

The default location will populate on all new requisitions and can be changed on each requisition line as needed. If you have any additional questions or problems, call BEN Helps at 215-746-HELP (4357).
REVISeD NSF PROPOSAL & AWARDS POLICIES AND PROCEDUREs GUIDE
Effective for proposals submitted or due on or after January 14, 2013. For proposals submitted prior to January 14, 2013, the guidelines in NSF 11-1 apply.

Available Formats:

ENFORCEMENT OF NIH PUBLIC ACCESS POLICY

Enforcement of NIH Public Access Policy

The Notice informs NIH grantees that beginning in the Spring of 2013 (at the earliest) NIH will delay processing of non-competing continuation grant awards if publications arising from such awards are not in compliance with the NIH public access policy. Under the public access policy, all investigators funded by the NIH must submit to the National Library of Medicine’s PubMed Central database an electronic version of their final, peer-reviewed manuscripts upon acceptance for publication so that they may be made publicly available no later than 12 months after the official date of publication.

REVISeD PRE- AND POST- AWARD FORMS AND INSTRUCTIONS

NIH has announced the availability of newly revised forms and instructions used to submit interim and final progress reports, and other post-award documents associated the monitoring, oversight, and closeout of an award. Please see the NIH Guide notice below for more complete information.

- Revised Pre- and Post-Award Forms and Instructions Available
  (NOT-OD-12-152) National Institutes of Health

NIH ANNOUNCES UPDAtED GRANTS POLICY STATEMENT AND ELECTRONIC SUBMISSION OF MULTI-PROJECT APPLICATIONS

Effective for all NIH grants and cooperative agreements with budget periods beginning on or after October 1, 2012. See 10/1/2011 NIHGPS for prior budget periods.

NIH has just announced the publication of their revised grants policy statement and that they will be moving to electronic submission of multi-project applications. Please see the links below for more complete information.

- Publication of the Revised NIH Grants Policy Statement (Rev. 10/1/2012): Policy Changes and Clarifications Notice
  (NOT-OD-12-157) National Institutes of Health

While this revision does not introduce any new material for the first time, it incorporates new and modified requirements, clarifies certain policies, and implements changes in statutes, regulations, and policies that have been implemented through appropriate legal and/or policy processes since the previous version of the NIHGPS dated 10/1/2011. The document is available in the following electronic formats: HTML and PDF (http://grants.nih.gov/grants/policy/nihgps_2012/index.htm).

- NIH Announces Plans to Transition to Electronic Submission of Multi-Project Applications
  (NOT-OD-12-161) National Institutes of Health

Our office will provide further guidance on this transition plan.

The Bottom Line  December 2012
Purchasing Services announces new online forms for the Purchasing Card program:

**PURCHASING CARD APPLICATION FORM**
http://www.purchasing.upenn.edu/forms/purchasing-card-application.pdf

New purchasing card applicants will now be able to enter their information onto the form, print, sign (and get approval signatures), scan and email to the Purchasing Card Administrator at pcardsup@exchange.upenn.edu

No hard copy is required to be sent to the Purchasing Card Administrator.

**SINGLE TRANSACTION LIMIT EXCEPTION FORM**
http://www.purchasing.upenn.edu/forms/pcard-exception-form-single.php

For a single one time transaction exception limit, the form emails directly to the Purchasing Card Administrator upon submission. The Purchasing Card Administrator will notify you once the limit increase has been set.

**MONTHLY SPENDING LIMIT INCREASE FORM**
http://www.purchasing.upenn.edu/forms/pcard-exception-form-monthly.php

To increase a permanent monthly/single spending limit please complete the online form and submit. Upon receipt of this request the Purchasing Card Administrator will email once the limit increase is compete. This form can also be used for a timed monthly increase.

**REQUEST TO DELETE CARDHOLDER ACCOUNT FORM**
http://www.purchasing.upenn.edu/forms/pcard-delete-cardholder-account-form.php

Upon submission of the deletion form to the Purchasing Card Administrator and account deactivation the Purchasing Card Administrator will notify the Business Administrator of deletion.

Please properly destroy the Purchasing/Fleet Card at your department. It is not required to return the card to the Purchasing Card Administrator.

All forms are located on the Purchasing web site at http://www.purchasing.upenn.edu/forms/

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**U.S. Postal Service: Intelligent Mail Barcode (IMb) for Use on Business or Courtesy Reply Envelopes**

University departments using business or courtesy reply envelopes for their mailings should be aware of a new policy by the United States Postal Service (USPS). Beginning Jan. 2013, anyone using a business or courtesy reply envelope in their mailing is now required to print the USPS Intelligent Mail barcode on these envelopes. Envelopes that do not utilize the Intelligent Mail barcode will incur increased costs for these mailings, as well as possible denial of automation discounts for outgoing mailings.

For more information about the Intelligent Mail barcode and how it will affect your next mailing, contact your printer or the USPS Mailpiece Design Analyst Support Center at 1-855-593-6093 or by sending email to mda@usps.gov.
Even greater discounts on cellular service are now available to members of the Penn community. Since 2004, partnerships with AT&T Wireless, Sprint/Nextel, and Verizon Wireless have enabled over 9,000 faculty, staff, and students to enroll in discount programs that have resulted in significant savings on cellular service. Recently, ISC and Purchasing worked together to secure additional discounts from these three providers, which are projected to result in savings of over $1M annually to Penn corporate and individual accounts. In some cases, Penn receives a small portion of monthly service fees as a revenue-share, which provides financial support for Public Safety emergency phones.

Under the new agreements, AT&T Wireless, Sprint/Nextel, and Verizon Wireless have increased corporate discounts on monthly voice/data service plans purchased by University schools and centers, and individual discounts on monthly voice/data service plans purchased privately by Penn faculty, staff, and students (with the exception of Verizon, which does not currently offer student discounts). Additionally, all three cellular providers offer discounts on accessories and have reduced or eliminated activation and termination fees.

Corporate customers are encouraged to check their bills to make sure that the appropriate FAN (Foundation Account Number) has been assigned to their accounts to take advantage of University discounts. For questions regarding University corporate cellular discounts, please contact Dave Mongeluzi at davem@isc.upenn.edu or 215-898-1264.

For existing individual faculty, staff, and student accounts, increased discounts should be automatically applied to all bills. To confirm registration, or to enroll in the Individual Cellular Discount Program, please see the website below or contact your cellular provider directly.

Additional information on Penn’s Cellular Discount Program is available at: http://www.upenn.edu/computing/voice/cellular/index.html

<table>
<thead>
<tr>
<th>Service Plan</th>
<th>Corporate Discount</th>
<th>Faculty &amp; Staff Discount*</th>
<th>Student Discount*</th>
</tr>
</thead>
<tbody>
<tr>
<td>AT&amp;T Wireless</td>
<td>25% (previously 14%)</td>
<td>14% (previously 12%)</td>
<td>14% (previously 12%)</td>
</tr>
<tr>
<td>Sprint/Nextel</td>
<td>25% (previously 20%)</td>
<td>18% (previously 10%)</td>
<td>10% (previously 10%)</td>
</tr>
<tr>
<td>Verizon Wireless**</td>
<td>25% (previously 17%)</td>
<td>18% (previously 17%)</td>
<td>Currently not available</td>
</tr>
</tbody>
</table>

*For multi-user plans, must be primary account holder.
**Some previous discounts are grandfathered into new agreement. Contact provider for details.
Information Systems & Computing (ISC) has officially announced its “Traditional Telephone is History” campaign. The campaign, which began on November 1, will alert the University community that traditional telephone service will be discontinued and departments and offices will need to upgrade to PennNet Phone service.

**Traditional Telephone Service to be Discontinued on July 1, 2014**

ISC began announcing the retirement of its traditional telephone service in June during campus talks and presentations and in July with an announcement in the Almanac: traditional telephone service will be discontinued on July 1, 2014 and Departments that do not schedule their migration to PennNet Phone during FY13 will pay higher costs associated with remaining on the traditional phone infrastructure. Additionally, beginning January 8, 2013, requests for traditional service will no longer be accepted. Information about traditional telephone phone service, such as equipment, user guides, and voice mail options, will be removed from the website with the exception of rate and support contact information. Traditional telephone users will be reminded that they will need to upgrade to PennNet Phone when placing support and service repair calls. Telephone Support Providers (TSP) will also be notified so they can encourage their traditional telephone users to upgrade now to avoid higher costs associated with remaining on the traditional telephone system.

**Switch Now Discount Program—but for a Limited Time Only**

To commemorate the final phase of moving the campus from analog to VoIP-based telephone service, ISC is waiving line activation and port conversion fees for traditional telephone users upgrading to PennNet Phone. This is a significant savings for departments and offices—for offices of 10 or more, this is a minimum savings of $1,300. If you have held off on switching to PennNet Phone, now is the time to switch. The Switch Now Discount runs through June 28, 2013 and traditional telephone costs will increase in FY15.

**Bringing a Better Telephone Service to Penn**

ISC brought VoIP (Voice over Internet Protocol) to Penn as its solution for upgrading the University’s aging telephone infrastructure—the existing cable, laid more than 50 years ago, would soon require expensive repairs and replacement. PennNet Phone, the University’s VoIP service, enabled ISC to manage project costs while it explored customer needs and advantages of switching from traditional copper-based technology to VoIP (Voice over Internet Protocol). As a result, University telecom administrative bills have gone down from $8.3 million annually to $6.3 million annually; with additional reductions expected to continue through FY15.

**The Advantages of PennNet Phone**

PennNet Phone provides a number of advantages over traditional telephone. Unlike traditional phone, PennNet Phone costs are significantly much lower because it uses digital technology. Fees for local and long distance calls are 50% less when compared to traditional telephone calls: monthly set rental fees are reduced to $3 each per month compared to $10.40-$11.70 for traditional single-line and two-line sets, and monthly voice mail charges are lowered to $3 each per month compared to $9.75-$12.35 for traditional voice mail. Cost savings are only part of the PennNet Phone advantage.

Over the last five years, the telephone market has changed dramatically. Smartphones, tablets, and laptops have brought the convenience and benefits of mobile technology and e-commerce to us all—navigating websites, viewing and ordering products from anywhere we have Internet access. PennNet Phone is part of that smartphone evolution: from intelligent handsets that allow you to do more within the office—such as access Penn’s Online Directory or track and manage incoming calls to the PPS (PennNet Phone Service) web service that allows you to manage certain features wherever you have access to a web browser—allowing you to stay productive while away from the office. For example, logging into PPS, you can elect to receive and listen to voice mail messages in email, forward calls to any cellular or landline phone, manage your voice mail passwords, or view the total number of messages in each voice mail folder (new messages, old messages, work, family, friends) and delete them. Additionally, ISC recently introduced self-service ordering for PennNet Phone. The Online Management System (OMS)

Continued on the next page
Information Systems & Computing (ISC) has unveiled its latest features for PennNet Phone that will enhance your telephone experience: a new Intercom Service and an upgraded Bridged Line Appearance.

**MUCH ASKED FOR INTERCOM SERVICE IS HERE**

Departments and offices handling a high volume of incoming calls will be pleased to learn that Intercom Service, a much requested feature for PennNet Phone, is now available. Intercom Service can be set up between two persons or members designated as a group. Intercom groups are ideal for project teams and departmental communications. The Intercom ring has a distinctive sound, so persons will be able to tell the difference between an incoming intercom call and an outside call.

**Bridged Line Appearance is Upgraded to 8 Lines**

Bridged Line Appearance (BLA), sometimes referred to as shared lines, has been upgraded from a five to an eight line appearance. This means that a single number can be shared by eight persons and each person belonging to the BLA group can answer incoming calls as well as view the status of the shared number.

**Music to Your Ears**

If you find placing telephone callers on hold an activity that you can’t always avoid, you can now make it a bit more pleasant for both you and your callers! Starting this month, all PennNet Phone users can elect to use PennNet Phone’s Music on Hold feature. Music on Hold will play recorded music that telephone callers will hear when placed on hold. Instead of hearing silence, your telephone callers will be quietly engaged with music, improving the quality of their wait time. The Music on Hold feature is turned off by default. To turn it on, go to [www.upenn.edu/computing/voice/phone](http://www.upenn.edu/computing/voice/phone), select “Log into to PPS (PennNet Phone Service),” in the menu bar to the left, select “Features and Voice Mail,” and under the “PennNet Phone Settings” section, click “on” for Music on Hold. That’s it!

**Activating these Features**

Both Intercom and Bridged Line Appearance must be activated by the ISC Service Desk. To request Intercom or Bridged Line Appearance (BLA) service or an upgrade to a previously installed BLA, call the ISC Service Desk at (215) 746-6000 or email service-requests@isc.upenn.edu.

If you do not have PennNet Phone, you should start the process of switching from traditional telephone service to PennNet Phone. ISC will discontinue traditional telephone service in 2014. Departments that do not schedule their migration during FY13 will pay higher costs associated with remaining on the traditional phone infrastructure. For more information about upgrading to PennNet Phone, including PennNet Phone’s lower telephone and voice mail rates, benefits, services, and self-service features, call the ISC Service Desk at (215) 746-6000, email service-requests@isc.upenn.edu, or please be sure to visit [www.upenn.edu/computing/voice/phone](http://www.upenn.edu/computing/voice/phone).

**Traditional Telephone to be Discontinued in 2014: ISC Announces its “Traditional Telephone is History” Campaign**

Continued from the previous page allows you to save time and reduce order errors by allowing you to order new handsets, make changes to your existing handsets, view order details, and track the progress of your order.

**Call Now—We’re Here to Help**

If you do not have PennNet Phone, you should start the process of switching from traditional telephone service to PennNet Phone. Telephone Support Providers and ISC Project Leaders will be available to assist departments and offices in coordinating their move to PennNet Phone, including evaluating needs for new services and equipment. For more information about upgrading to PennNet Phone, including PennNet Phone’s lower telephone and voice mail rates, benefits, services, and self-service features, or to speak with an ISC Project Leader, call (215) 746-6000 or send email to service-requests@isc.upenn.edu.
Fishing for Feedback

Have you been to a BEN Financials or Payroll training class within the last 6 months? If so, we’re looking for feedback and suggestions.

Now that you’ve settled in and actually have had a chance to use what you’ve learned, we’d like to know:

- Did the class you attended prepare you for your job?
- Looking back, do you wish you learned more about a particular subject and less of another?
- How could Financial Training have better prepared you for the “real world”?
- Do you think additional subject matter should be added to our course offerings? If so, what would the topic be you would like to see offered?

Send us an email with your thoughts, suggestions, and ideas:
training@exchange.upenn.edu

Or call/e-mail any one of the FTD staff members below to discuss your ideas or to set up an in-person meeting:

- Jim Horstmann: 573-6717 jhorstma@upenn.edu
- Joe Mullock: 573-8988 jmullock@upenn.edu
- Barbara Murray: 898-1733 murrayb@upenn.edu
- Paul Weidner: 898-1447 weidnerp@upenn.edu

We can’t wait to hear from you!

Below is a frequent topic/issue asked of BEN Helps…enjoy the review!

BEN Knows

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

To check the status of an eForm:
From the following URL:
http://www.upenn.edu/computing/da/eforms

If you are the Initiator/Submitter:
- Click on the ‘My eForms status’ link
- The list will show ALL eforms you submitted (BEN Financials, Data Warehouse, etc.)
- Once you find the eform you want to review, click on the ‘Route Log’ icon to view the routing history

If you are an Approver:
- Under ‘Supervisor and Administrators’ section, click on the ‘Action List’ link
- You can perform a ‘doc search’ by entering one or more of the following search criteria:
  - Document/Notification Id
  - End-user’s PennKey or Penn ID by using the ‘Initiator’ field
  - Date range by using the ‘Date Created From’ and ‘Date Created To’ fields
- Once you have entered your search criteria, click on the ‘Search’ button or [Enter] key
- You can also use the ‘Action List’ to view all eForms you have acted on
  - To determine the current status, look in the ‘Route Status’ column
  - To determine the action request by you, look in the ‘Action Requested’ column
  - To view the routing history, click on the ‘Route Log’ icon
- You can also use the ‘Outbox’ to view all eForms which have been processed to date

NOTE: To view any notes, click on the Id number to view the eForm

The Bottom Line  December 2012