BEN FINANCIALS UPGRADE COMING NOVEMBER 2012

An upgrade to the BEN Financials application is scheduled to go live on November 26, 2012. The upgrade will be completed within a four-day window, with a system outage from the evening of Wednesday, November 21 until the morning of Monday, November 26. The system will be upgraded from version 11 to version 12. An upgrade is required in order to keep current with the latest version software and for back-end application support.

Who Is Affected?

All current BEN Financials users will be affected, including those who access BEN Assets (Property Management), BEN Balances (General Ledger), BEN Buys (Purchasing), or BEN Pays (Accounts Payable) modules.

What Will Change?

BEN Financials will have a modified look and feel, with enhancements to workflows and processes, and improved navigation. More detailed information will be provided as the implementation date approaches.

NEW FEATURE: VIEW UNIVERSITY CONTRIBUTIONS ON YOUR PAY STUB

As part of the Penn family, you receive a comprehensive total compensation package that includes competitive salaries and generous benefits. The University contributes a significant amount toward many of these benefits, including retirement, health care, tuition, disability, and wellness. And now you will be able to view the actual amount of some of these contributions each pay period.

The Divisions of Finance, Human Resources, and Information Systems & Computing are pleased to announce that your personalized pay stubs on the U@Penn website will now show, in addition to your own deductions, the contributions the University makes on your behalf. In addition to your salary, you will see how much the University pays toward benefits such as retirement, health care, life insurance, Social Security, and Medicare. This information will help you better understand the full cost of your benefits. Please note that pay stubs prior to September 2012 will not be updated to reflect these new fields.

To access your pay stub, go to www.upenn.edu/u@penn, select “My Pay” in the “Payroll and Tax” section, and login to your secure personal pay information.

For questions or feedback, contact Information Systems & Computing @ uatpenn@isc.upenn.edu.

NEW! PENNWORKS ADDITIONAL PAY PRE-WORK APPROVAL FEATURE

What is Pre-Work Approval?

Pre-Work Approval creates a process to establish a rate and set up preauthorization for additional work in excess of normally scheduled work time. As of August 2, 2012, those responsible for budget and compensation decisions within each School and Center can submit requests for pay rates and pre-authorization for eligible employees before the work commences (University Policy No. 305). This process will improve financial accountability and control following recommendations made by PricewaterhouseCoopers during the annual audit process.

A PennWorks Pre-Work request will, upon submission, be automatically routed to the appropriate Business Administrators, HR Coordinators and any other Supervisors, Department Chairs, or Deans (depending on the policy of each School/Center). After approvals and confirmation that the work has been completed, a draft Additional Pay request will automatically be created for the paying organization to process using the PennWorks Additional Pay module.

Pre-Work Approval is required for the following individual Additional Pay earnings types: Extra Services (ESH, ES2), Wharton Exec Ed & MBA Extra Services (ENR), and Allowance (ALA). All other earnings types will continue to follow the current Additional Pay process.

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Required Training
Evaluation of the training requirements is currently underway. Users for whom training is required will be able to access web-based, self-guided training. Training is targeted to be available three-four weeks prior to the upgrade. Updated reference materials will also be available. More information on training, including instructions and timing, will be provided to School/Center BAs as well as to all affected users closer to the training window.

Access
Access to BEN Financials will remain the same as before the upgrade. Users who complete the required training will only need to authenticate with their BEN Financials user names and BEN Financials passwords before accessing the system with a supported web browser. Desktop hardware and software requirements (http://www.finance.upenn.edu/ben/benfin/desktop_req/requirements.shtml) will be updated prior to the upgrade. More information will be provided to users and to support personnel as the requirements are finalized.

End-User Support
There will be no changes to end-user support. You may call the help line at 6-HELP (215-746-4357) or enter a ticket via BEN Helps online support at: http://BENHelps.finance.upenn.edu

Questions
More information about the BEN Financials upgrade will be provided directly to all affected users as we move forward in the process. If you have any questions, comments, or suggestions, please send an e-mail to: benadmin@lists.upenn.edu

For more information on BEN Financials, please visit the web site at: https://benapps.isc-seo.upenn.edu/

ADP TotalPay® Card - ONE YEAR LATER

It has been over a year since we began the ADP TotalPay card system. As you recall, all regular pays and reimbursements are now being made via either direct deposit or the TotalPay Card. Please read on for some important changes and reminders.

New Hires and Rehires
It is important that new hires be informed that they will be receiving the TotalPay Card. Please be sure to explain the new pay and reimbursement process to any new hires. The sample offer letters on the Human Resources website have been updated to include information about the TotalPay Card. As of July 11th 2012, all TotalPay Cards are mailed to individual’s home (current address) in an envelope with the Penn logo. The envelope will also contain an insert explaining the purpose of the card. This will cut down on the number of cards mistakenly identified as an “unsolicited credit card”.

Direct Deposit
Faculty, staff and students can choose direct deposit at any time. Please direct them to the U@Penn portal for the Enroll or Update direct deposit in the Payroll and tax section. Please note that all employees must have an email address in the University’s online directory prior to enrolling in direct deposit. Email addresses can be updated in the online directory by clicking on “Update directory listings” from the U@Penn portal.

It is also important to remember that if any employee currently on direct deposit changes their banking information; they will receive a TotalPay Card to ensure continuity for their pay. If their change in banking information for direct deposit becomes effective before the payroll cut off dates, their pay will be deposited to the new bank account. If not, the TotalPay Card will be used for deposit of their pay.

We have recently made critical changes aimed at streamlining new additions or changes to the employees direct deposit information. These actions should result in reduced cycle times for approval of the direct deposit information in the system.

Questions
For more information on these payroll options, visit Payroll’s website at: www.finance.upenn.edu/comptroller/payroll/receiving_your_pay.shtml

If you have any questions or concerns, please contact Payroll at payroll@exchange.upenn.edu or 215-898-6301.
NEW! PENNWORkS COMPENSATION CHANGE CONTROL

Effective August 2, 2012, PennWorks Role Update has been enhanced to now include Compensation Change Control. Compensation Change Control will systematically enforce University policy related to compensation changes for staff (both monthly-paid and weekly-paid full-time and part-time staff) by requiring pre-approval, and will ensure that salary changes made outside of the Merit Increase Program are reviewed and authorized by HR Compensation in advance of the action.

What Are the Changes?

Compensation Change Control will apply to annual salary or hourly rate changes made to a staff member's current Role outside the annual Merit Increase Program. Following are the specific process changes:

- Changes to annual salary or hourly rate will be controlled by HR Compensation, and will be made effective at the appropriate time in PennWorks by the Role Update user (Payroll Administrator)
- Compensation Change Control will apply to the following actions: Salary Increase, Reclassification, and Reappointment
- Compensation Change Control will apply to the following job grades: Staff, Interns, Limited Service, and Ungraded (senior-level administrative positions assigned a non-numerical grade)

What Is Not Included?

- Compensation Change Control does not include distribution changes; users may add/update distributions as before
- For all other Job Grades (non-staff including Faculty, Student, Temporary, Unionized, etc.), users may continue to enter annual salary/hourly rate amount changes during a Salary Increase, Reclassification, or Reappointment action
- New hires, re-hires, and transfers to a new position will continue to use the HR Recruitment process and in conjunction with these procedures, the annual salary/hourly rate can still be updated, if the user has appropriate access

New Compensation Change Procedure

The steps to make a change to compensation outside of the annual Merit Increase Program for an employee with a current position number are:

1. School HR representatives will communicate compensation change requests to HR.
2. HR Compensation will review the request, and if approved, make an entry in PennWorks in a "staging area" (similar to the Merit Increase Program) to record the new approved annual salary/hourly rate.

3. Role Update users will be notified via normal channels about HR Compensation's approval/rejection and, if applicable, the staged annual salary/hourly rate in PennWorks.
4. Role Update users will log into PennWorks within the "unlocked" period and submit the Salary Increase, Reclassification, or Reappointment, along with any other changes/edits to the Role.

No Training Required

No additional training is required for PennWorks Role Update users. Updated reference materials are available on the Financial Training web site:
http://www.finance.upenn.edu/ftd/documentation.shtml#pennworks

Questions

If you have any questions, comments, or suggestions, please send an e-mail to pennworks@lists.upenn.edu. For more information on PennWorks, see the PennWorks project page at:
http://www.upenn.edu/computing/isc/apps/pennworks/

NEW! PENNWORkS ADDITIONAL PAY PRE-WORK APPROVAL FEATURE

Continued from Page 1

Who Uses Pre-Work Approval?

Any faculty or staff member in the Penn Community may access the Additional Pay Pre-Work Approval feature to initiate a Pre-Work request after PennKey authentication. You do not need to be an existing PennWorks user to initiate a Pre-Work request. Any person named as an approver for a Pre-Work request may also access PennWorks to review/approve requests.

Access and Training

Only users who are new to Additional Pay (new School/Center HR representatives or new School/Center faculty approvers) are required to complete a web-based, self-guided training course. Existing Additional Pay users may optionally take training, which is a revised version of the existing "PennWorks Additional Pay Training for Approvers" course.

Questions

If you have any questions, comments, or suggestions, please send an e-mail to pennworks@lists.upenn.edu. For more detailed information on the key features and benefits of Additional Pay Pre-Work Approval, see the PennWorks project page at:
http://www.upenn.edu/computing/isc/apps/pennworks/

The Bottom Line

September 2012
Important Information Regarding Changes to Purchasing Card PaymentNet® Application

Effective Monday, August 20, 2012 our current purchasing card management platform transitioned to the updated PaymentNet 4.

- All PENN purchasing cardholders/users will have migrated to the new PaymentNet 4 platform which will deliver state-of-the-art technology designed to increase efficiencies in your daily operations.
- PaymentNet 4 now provides robust and informative help screens to provide on-the-spot answers to cardholder questions. Please review the Payment Net® Online Help Quick Reference Card to become familiar with this feature.

What Changed?

- All of your current information and 21 months of transaction history transitioned from PaymentNet 3 to PaymentNet 4.
- User ID’s must now contain 6 characters
- During the initial transition to PaymentNet4 cardholder/user were issued a temporary password that must be used to log on within 90 days or it will expire and the user ID will be locked.
- The security for the PaymentNet 4 logging on process has been updated.
  - Please note the new URL address: www.paymentnet.jpmorgan.com for logging in.
  - Please review the Logging On Quick Reference Card for log on instructions.
  - Password security changes include the following:
    - All passwords are case sensitive
    - Passwords must contain at least 7 but no more than 25 characters in length
    - Passwords must contain one alphabetic and one numeric character
    - Passwords may contain up to 3 special characters. Valid special characters are: ! : ~ _ - { }
    - Passwords will expire every 90 days and cardholders will be prompted by email to reset it before expiring.
    - PaymentNet4 will not allow the reuse of any of the five previous passwords

- For a short video tutorial, please view the Logging On tutorial.
- Each computer used to access PaymentNet 4 must be registered to the user ID. A single user ID can be registered to an unlimited number of computers.
- The first computer used to access PaymentNet4 is automatically registered. On subsequent computers, users will be prompted to enter an activation code which they will receive via their business email address on file in PaymentNet.
- To use the “Forgot your password” functionality upon initial log on, cardholders will be required to establish three password reset challenge questions. To retrieve the temporary password, the users must have access to their business email address on file in PaymentNet and must input answers exactly as provided during set up.
- For step-by-step instructions for cardholders, please reference the updated cardholder Quick reference guide at http://www.purchasing.upenn.edu/card-services

Questions?

If you have questions, please call the Purchasing Card Administrator at 215-898-3606 or send an email to pcardsup@exchange.upenn.edu.

Log On

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<tr>
<th>Organization ID</th>
<th>User ID</th>
<th>Password</th>
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Case sensitive

Remember my Organization ID

Forgot your password?
Effective Monday, July 23, 2012 the Penn Marketplace upgrade will result in the following enhanced features:

**Enhancements to Searching:**

- **Simple Search**
  The simple search, most commonly used way that users search is an “all these words” search, meaning all the words must be present in order for a match to display in product search results. Users may notice now if no search results are available, the search engine will expand this to use “any of the words”. This new feature will provide more options for shoppers.

- **Advanced Search**
  Advanced search is often used when a shopper is searching for more specific criteria, such as a specific supplier, manufacturer number, etc. When advanced search is used and multiple criteria fields are populated, and if no search results are available, the system will automatically “open up the search.” It will remove the additional criteria and only search for keywords and/or part numbers in an effort to locate the item the user is looking for.

**Shopper Feedback**

- Users will now be able to communicate their “need” or feedback to the system administrator when they are not able to find the item in their search results. A message will appear stating no items found and from there you can submit your feedback.

- To submit the feedback a form will be generated for you to enter your information.

**Free Ground Shipping Indicator**

- Many suppliers provide free shipping when ordering goods from the Penn Marketplace and has been indicated so with the use of the shipping logo . An additional new feature will now allow end users to clearly identify and be visible within the product search results and the shopping cart. The “Free Ground Shipping” option can be attached to a dollar threshold where applicable. For example, free shipping may be available with a supplier for any orders over $40.

**View in the cart:**

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View in the search result:
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If you have additional questions, please contact mtkplace@exchange.upenn.edu.

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**HOLD THE DATE FOR PURCHASING SERVICES RESEARCH SUPPLIER SHOW**

On Wednesday, October 3, from 9 a.m. to 2 p.m. the 2013 Purchasing Services Research Supplier Show will be held in Houston Hall, 3417 Spruce Street. Purchasing Services welcomes all Penn staff and faculty members to participate in this year’s event in line with the Year of Proof: “The Proof Is in the Value.” Learn about the University’s preferred RESEARCH supplier cost containment initiatives and continued sustainability efforts.

This event will provide you with an opportunity to expand your knowledge about Penn preferred research related supplier product offerings and promotions, cost savings opportunities, and green purchasing initiatives from over 40 suppliers.

Light refreshments will be provided throughout the day. To be eligible to win door prizes bring your PennCard to register to win.

For details, visit [www.purchasing.upenn.edu/news](http://www.purchasing.upenn.edu/news)
Effective 7/1/12, the Office of Research Services (ORS) will no longer review and approve international travel reimbursement request on federally sponsored program awards. We expect that this change will reduce administrative burden and improve processing time for reimbursement of foreign travel expenses.

The review and approval of international travel reimbursement requests on federal awards was taken on by the Office of Research Services (ORS) primarily to ensure that University and federal policies and procedures were followed, particularly complying with sponsor's prior approval requirements and restrictions, allowability of cost, receipt documentation and complying with the federal requirement to use a U.S. air carrier on programs funded by the Federal government.

Beginning July 1, 2012, requests for reimbursement of international travel on federally sponsored program awards should be routed directly to the travel office for processing. As required for all sponsored program activity, departments, schools and centers are expected to ensure that expenses incurred for international travel is justified, well documented and in compliance with the sponsor and University policies. Expenses incurred for international travel must also be appropriate to and specifically benefit the intent and purpose of the award and be incurred within the period of the performance or any authorized extension. As a reminder, in conjunction with business administrators, higher level approvers are responsible for ensuring the following:

- the PI & Sponsor have approved the foreign travel;
- the traveler is aware of the University Travel Policy in advance of the travel;
- the traveler is aware of Fly America Act and "open-airline" skies agreement
- travel expenses were incurred while conducting authorized University business;
- travel expenses were allocable, necessary, reasonable and consistent with University policies and the stated business purpose;
- an expense report includes the required documentation;
- travel expenses meet any and all Sponsored Program guidelines, if applicable.
- report documentation and related justifications are maintained in the departmental records per the University record retention policy;
- traveler is aware that travel expenses are subject to University and sponsor audit and disallowances.

ORS will be hosting a brown bag seminar in the Fall on this topic. The topics of discussion will be: Pre and Post award considerations, complying with fly America act, receipt & documentation requirements, preparing a justification, allowable cost, maintaining documentation in departmental records and lessons learned.

If you have any questions regarding this communication, please contact the Post Award Director.

Please visit the following links for more information on University Sponsored Projects Expense Documentation Requirements and International Travel Policies:

http://www.finance.upenn.edu/vpfinance/fpm/2350/2350_pdf/2357.pdf

For more information on International travel on federal awards, please visit the following links:

The National Institutes of Health Grants Policy Statement (GPS) Section 4.1.11 & 8.1.2

U.S. General Services Administration:
http://www.gsa.gov/openskies

Office of Management and Budget (OMB) Circular A21-(allowable cost) Section J.53
http://www.whitehouse.gov/omb/circulars_a021_2004#1

Facility & Administration and Employee Benefit Rates

We are very pleased to announce that the University has just completed and executed a new two-year extension of our current Facilities and Administrative (F&A) Rate agreement with the U.S. Department of Health and Human Services (DHHS), effective with FY13. That means that the existing F&A rates (i.e., 60% on-campus and 26% off-campus for sponsored research) will continue through FY13 and FY14. The current rate agreement runs through FY12.

The agreement also included approval of the employee benefits rate which remains 31.8% for Federal awards. The dependent tuition rate is 2.3% for FY13. The combined rate is 34.1%.

Office of Research Services
Dear Penn Mail Services Patrons,

As you likely know, the mail business has been rapidly changing over the last several years. The advent and growth of electronic communications (email, pdfs, websites, social media) has steadily reduced the volume of revenue generating outgoing first class US mail pieces, bulk mail and express shipping packages sent from campus via Penn Mail Services.

Based on current trends, Penn Mail Services is looking to position itself for the future and as such is reevaluating all its services. As part of that reevaluation, we have developed a short survey to help determine how the campus is making use of Intramural Mail. Your answers will help to determine how to remake Intramural Mail Service at Penn. Please note, no decisions have been made. Before any changes are implemented, there will be additional opportunities for feedback. Your participation in this effort is greatly appreciated and vital to its success.

Please access the survey at: www.upenn.edu/survey/intramuralmail

We would like to ask you to please forward our survey to your colleagues and staff as appropriate so that our survey results reflect as many patrons as possible.

Thank you,
Penn Mail Services

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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, 2012

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

Last Quarter’s Winner:

Irene Soroka
Office of the Vice Provost for Research

1. As part of the PaymentNet 4 implementation, Purchasing cardholders have how many days to login with a temporary password?
2. Under what circumstances can an Honorarium be paid to a Penn faculty or staff member?
3. What is the matching share for the Federal Work Study Program during academic year 2012 - 2013?
4. If a staff person receives a mid-year salary increase, can the Payroll Administrator enter the new salary directly into PennWorks?
5. When is BEN Financials scheduled to be upgraded?
6. How do I remove a ‘Qty Rec’ Hold?

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VP of Finance & Treasurer Service Hours

Accounts Payable
Mon – Fri ..........................10:00 a.m. – 2:00 p.m.
Cashier
Mon, Wed - Fri ....................9:00 a.m. – 4:30 p.m.
Tues .................................10:00 a.m. – 4:30 p.m.
Payroll
Phone:
Mon – Fri ..........................8:00 a.m. – 5:00 p.m.
Window:
Mon – Fri ..........................10:00 a.m. – 2:00 p.m.
Student Registration & Financial Services
Mon, Wed, Thur & Fri ..............9:00 a.m. – 4:45 p.m.
Tues .................................10:00 a.m. – 4:45 p.m.
Goodbye to the Term ‘Honorarium’

Beginning in FY 2013, Penn is no longer using the term *honorarium* to refer to a payment made to Penn faculty and staff members for such services as delivering a speech or serving as a speaker at a Penn-sponsored event. The practice of providing separate payments for these services rendered by Penn faculty and staff should be rare. If there is a compelling reason to provide payment, units should process using the Extra Services option in the Additional Pay process.

Please note that Penn will continue to use the term *honorarium* to refer to payments made to individuals from outside of the University for the services referenced above.

If you have questions, please do not hesitate to contact Julie Shuttleworth, jshuttle@upenn.edu, regarding faculty, or Sharon Jacobs, jacobss2@upenn.edu, regarding staff.

**Student Employment Office**

**Academic Year Work-Study Program**

The first day a student may begin working is August 27 and the last day is May 12, 2013. The pay schedule is on the Student Employment Office website at [http://www.sfs.upenn.edu/seo](http://www.sfs.upenn.edu/seo).

The academic year is a new financial aid period; work-study supervisors through their SEMS account must appoint work-study students to an online Job Appointment Form for the academic year.

The matching share contribution is 50% federal or Student Registration & Financial Services and 50% department.

If you have any questions, please send an email to seo@sfs.upenn.edu.

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**BEN Knows**

**How to Manage Holds?**

[http://www.finance.upenn.edu/benknows/](http://www.finance.upenn.edu/benknows/)

- Why did my invoice go on Hold?
  - An invoice is placed "on hold" for one or more of the following reasons:
    - Quantity Ordered (Qty Ord)
      - Quantity billed is = or > [quantity ordered X 10% tolerance]
    - Maximum Shipment Amount (Max Ship Amount)
      - Amount billed on invoice is = or > $25.00 of purchase order amount
    - Quantity Receipt (Qty Rec)
      - Quantity billed is = or < quantity received

- How do I remove an invoice on Hold?
  - For Qty Ord & Max Ship Amount:
    - To approve payment of the invoice:
      - Click on the *Holds Resolved* stamp to affix the markup to the image
      - Click [OK] for the Comment box
      - Note: Comments not required
      - Click [OK] again to process
      - Click [OK] to save the stamp to the image and transition the document to Accounts Payable
    - To cancel payment of the invoice:
      - Click on the *Route to Accounts Payable* stamp to affix the markup to the image
      - Enter a note in the Comments box ‘Cancel invoice’
      - Click [OK] for the Comment box
      - Click [OK] again to process and save the stamp to the image and transition the document to Accounts Payable
  - For Qty Rec:
    - ‘Receive’ the PO from either the Requisitioner or PO Manager Responsibility. For additional info, click below:
      [http://www.finance.upenn.edu/benknows/browse_topics/invoice_holds_def.shtml#qtyrec](http://www.finance.upenn.edu/benknows/browse_topics/invoice_holds_def.shtml#qtyrec)

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**The Bottom Line**

September 2012