TRAVEL & EXPENSE MANAGEMENT (TEM) UPDATE: CONCUR EXPENSE ROLLOUTS

The TEM Team continues the campus-wide rollout of Concur Expense, the expense report submission module of the Concur Travel & Expense Management (TEM) application. Concur is the fully integrated online travel booking, expense reporting, and reimbursement application for faculty, staff, and students conducting University business. The full Concur Expense Rollout Schedule showing each School/Center’s timeslot is available online.

TEM Resources
As faculty, staff, and students in your School/Center begin using Concur, please direct them to the following resources to help make their transition to the new system smoother and easier:

- **Penn TEM Website** – includes Concur login, important updates, links to policy documentation, Penn Travel Card information, preferred travel vendors, and more
- **Training Manuals** – instructional guides on booking travel, creating and approving expense reports, and special topics
- **How-To Videos** – videos on creating and submitting expense reports, setting up mobile receipt application, assigning delegates, and more
- **Frequently Asked Questions** – Travel, Expense, and Penn Travel Card FAQs
- **“Know Before You Go” Brochure** – quick guide on travel booking and reimbursement, car rental, and more
- **TEM Advisory Group Representative** – for questions about School/Center-specific policies
- **Penn Travel Card** – information on the benefits of having a travel card and application instructions

End User Support
For help with Concur, call the helpline or send an e-mail:

- 215-746-4357 or 6-HELP
  - Option 3 for Concur
  - Option 1 for Travel or 2 for Expense
- Email: temsupp@exchange.upenn.edu

For questions about the Penn Travel Card, contact Travel Card Administration at 215-898-3606 or CardAdm@exchange.upenn.edu.

IMPORTANT I-9 REMINDER!

Business Administrators are responsible for ensuring I-9 Employment Eligibility Verification forms are fully completed for all employees, which includes Social Security Numbers. If the employee has applied for, but not yet received, his or her Social Security Number (SSN), the Business Administrator must complete the following steps:

- Select “SSN Applied For” on the I-9 eXpress system
- Follow-up with the employee to be sure an SSN is obtained
- Once the SSN is obtained, return to the I-9 eXpress system to update the I-9 Form with the appropriate SSN
  - **Important Note!** 999 numbers cannot be entered on the I-9 form

If the employee is being paid, he or she must have a valid SSN before the end of the calendar year for W-2 purposes.

In This Issue...

- **BEN Knows – BEN Helps Workspace** …… Page 9
- **Business Services**
  - **PennCard and Computer Connection Move** ………... Page 3
- **Comptroller’s Office**
  - ADP – The Aline Card…………………… Page 2
  - New Tax Rates for Philadelphia …….. Page 2
- **Mission Continuity** ……………………………. Page 3
- **PHOS Housing Fair** …………………………. Page 3
- **Purchasing Services**
  - Changes to PaymentNet …………………… Page 4
  - New Look Penn Marketplace ………… Page 5
  - Promotional Products w/Penn Logo … Page 6
  - Purchasing Card Training ………………… Page 6
  - Research Supplier Show …………………… Page 7
- **Quarterly Quiz** ………………………………. Page 9
- **Research Services**
  - Policy on Recovering F&A Rates………. Page 8

Continued on Page 2
ADP’S NEW PAR CARD PRODUCT – THE ALINE CARD

In June 2011, Penn in partnership with ADP provided employees with the ADP TotalPay Card. This card was issued for the payment of wages or a reimbursement for travel or other expenses.

Starting July 15th 2013, the ADP TotalPay card will transition over to ADP’s new pay card, the Aline Card.

At this time, the transition is for new employees of the University of Pennsylvania as well as any current employees who change their direct deposit information and do not already have a paycard. Any new employees starting on July 15th and after will receive the Aline card along with a memo (similar to the TotalPay card memo) in an envelope with the Penn Logo. The card will be mailed to their current address listed in the Payroll System.

All current employees with an active Total Pay card will keep their pay card until the expiration date of the card and at that time will be issued an Aline Card. The expiration date is located directly above your name on the card. One month prior to the expiration date you will receive a new card from ADP which is now branded as an Aline Card. It will work exactly like your current pay card. Your account number will stay the same and the balance and any new activity will be transferred to the Aline Card. You will be able to use the Aline Card for purchases, to pay bills on line, withdraw money from ATMs and get cash back after a purchase.

The only difference is that the card is black and says Aline.

As with the previous TotalPay card, when you receive the new Aline card please follow the enclosed activation instructions and review the terms and conditions. If you have questions, please contact ADP at 1-877-237-4321, or visit their website at:

www.mycard.adp.com

NEW TAX RATES FOR PHILADELPHIA RESIDENTS AND NON-RESIDENTS

The Philadelphia Wage Tax rates for taxable compensation have changed effective July, 2013. The Philadelphia Resident rate has changed from 3.9280% to 3.924%. The Philadelphia Non-Resident rate has changed from 3.4985% to 3.495%.

Please contact the Tax Department at 898-6573, 898-7792 or 898-1543 with any questions or concerns.

TRAVEL & EXPENSE MANAGEMENT (TEM) UPDATE: CONCUR EXPENSE ROLLOUTS

Special TEM ‘Bottom Line’ Issue

In August, there was a special TEM issue of The Bottom Line with a wealth of information including policy and procedure updates, what to check when approving an expense report, helpful tips, important resources, Penn Travel Card information, and more. Please check out this issue and share it with users in your School/Center.

Upcoming Open House Q&A Sessions

Open House Q&A sessions have been held for Schools/Centers using Concur, and additional sessions will be held monthly as users transition to the new system. The next sessions will be held on the following dates in the Business Services Conference Room, 3401 Walnut Street, Suite 440A:

- Wednesday, September 11, 1:00-3:00 p.m.
- Monday, September 16, 10:00 a.m.-12:00 p.m.
- Tuesday, October 15, 10:00 a.m.-12:00 p.m.

Registration information for the Q&A sessions will be sent directly to TEM Advisory Group members prior to each session.

In addition, if you would like to request that a training session be held in your School/Center, please contact Hilary Easley at easleyh@upenn.edu to schedule a session.

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.
The Penn Bookstore underwent renovations this summer. Among the changes was the relocation of the PennCard office and Computer Connection, both of which will occupy the section that previously housed music and DVDs on the second floor. With these moves, members of the Penn Community will now be able to purchase books, supplies and branded merchandise, get their PennCard or PennKey, have passport photos taken, buy stamps, use a notary and have their technology needs met all under one roof.

Next to the café on the second floor, a new multipurpose study space has been added with new desks, chairs and USB-equipped outlets. The space is designed so it can transform into a presentation room with seating for 50 people and appropriate multimedia equipment for events such as faculty author lectures and book signings.

The first floor underwent changes including the relocation of school spirit merchandise to the front of the building. Relative to books, the priority has been to preserve the existing number of titles, in particular maintaining categories that are of academic interest, and highlighting those by Penn faculty authors. In addition, Wi-Fi service has been amplified and food options were expanded and more centralized in the café section.

New Hours
With the relocation, there are new hours of operation:

**PennCard**
8:30 a.m. - 5 p.m., Mon. – Fri.

**Computer Connection**
8:30 am - 6:30 p.m. Mon. – Fri.
10 a.m. - 5 p.m., Sat. & Sun.

**Bookstore**
8:30 a.m. - 9:30 p.m. Mon. – Fri.
10 am - 9:30 p.m. Sat.
10 a.m. - 8 p.m. Sun.

**Mission Continuity**

The University’s Mission Continuity Program (MCP) announces that the new version of Shadow-Planner, the software used to store the University’s mission continuity plans, was released University-wide on August 12th. Training, which is mandatory for all users, is available in Knowledge Link:

[http://knowledgelink@upenn.edu](http://knowledgelink@upenn.edu)

It is comprised of three modules:
- Mission Continuity: Shadow-Planner Application (required)
- Mission Continuity Knowledge Building module (optional)
- Information Security and Privacy (required if users have not completed before)

Also, the MCP will be sponsoring Q&A sessions for all users, to answer any questions they may have after viewing the online training.

All are invited to visit the MCP website at: [http://www.upenn.edu/missioncontinuity/](http://www.upenn.edu/missioncontinuity/) or to send questions to [askmc@lists.upenn.edu](mailto:askmc@lists.upenn.edu).

**2013 PHOS Housing Fair**

Save the Date

Penn Home Ownership Services is hosting its 2013 Housing Fair on Wednesday, September 18 from 1:30 p.m. – 4:30 p.m. in Bodek Lounge in Houston Hall. Full time employees of the University and the Health System are invited to meet with our lending partners, Penn Home Ownership Services representatives and Philadelphia Home Buy Now to discuss the current real estate market and its implications for Philadelphia. Attendees will gain access to a wide array of housing-related information and resources for West Philadelphia and the wider community.

Please click here if you would more information about the 2013 Housing Fair.
The new release of PaymentNet is now offering a few enhancements to the following screens:

**Improved functionality on the Log In screen offers a design that:**

- Easily identifies alerts, tips & access points for online help
- Provides helpful tips displayed on each screen
- Displays error screen messages with specific clear guidance for quick resolution
- Offers an online function to securely recover your Org ID or User ID
  - Enter your J.P. Morgan Commercial Card number and answer a verification question
  - Upon verifying your identity, your organization ID and user ID will display on screen
  - Changing your password in PaymentNet is now easier

**New change password screen displays several features to help you change your password.**

- As you enter your new password, PaymentNet now verifies, and displays a visual indication, that the password conforms to the set requirements that display to the right of the fields
- As you confirm your new password PaymentNet verifies, and displays a visual indication, that the entered passwords match. By default, the characters you enter in the New and Confirm password fields are masked. To display the characters you enter, click the Show Characters link.

**Changing your PaymentNet security questions, formerly called “authentication questions,” is now simpler.**

- When you click the Change Security Questions link on the My Profile screen, a new Change Security Questions screen displays.
  - You can delete or edit an existing security question or provide an answer to a security question you previously left blank
  - To delete your answer from a security question, click the X located in the field of the answer you want to delete
  - To change your answer to a security question click the X and enter your updated answer
  - After clicking Save, the answers you changed are displayed unmasked and deleted answers are blank
  - PaymentNet provides the opportunity for you to go back and make edits or to submit the changes
Penn Purchasing Services is introducing a new look and feel to the Penn Marketplace effective Monday, September 9, 2013. The new features include the following:

- New vertical navigation icons replace the horizontal menu
  - Menu options are displayed by simply hovering over the icons

- Action items and notifications are now displayed at the top right of the screen
  - New or open Action Items and Notifications are displayed with a highlighted number indicating the number of items awaiting your attention

- New cart preview window allows you to quickly browse cart content by clicking on the cart icon at the top right of the screen

Click here for more detailed information.

AN EASY TELROSE CUSTOM STAMP/SIGN ORDER FORM NOW AVAILABLE ON THE PENN MARKETPLACE HOMEPAGE

For ease of ordering of custom stamps/signs from Telrose, you can now click on the Telrose/Office Depot Custom stamp icon located in the Supplier Service Forms section. Enter your information into the open fields and then “add and go to cart” to have your order processed. In addition you must email your detailed information directly to Martin Hull at:

martinh@telrosecorp.com
Many University departments purchase a variety of items that feature the Penn logo. Often these are “promotional” items that are distributed at informational fairs or used by Penn affiliated organizations. Recently, a number of unfortunate events at manufacturing facilities throughout the world have increased the attention given to the conditions under which these goods are produced.

Penn has long been at the forefront of endeavors to ensure that goods bearing its trademarks are produced by companies that adhere to high standards. The institution takes an active approach in working with companies that share those principles and has identified a provider to meet these unique requirements.

Promoversity (BEN Buys Supplier #475217) is the preferred contract supplier for producing promotional items and apparel that incorporate Penn branding into their designs. As a licensed supplier to the University, Promoversity has agreed to adhere to the University’s Code of Workplace Conduct for Penn Licensed Product Manufacturers, which outlines a set of minimum production standards and labor practices (see Almanac 9/18/12). The company is a member of the Fair Labor Association and a Certified Green Business.

The company has been provided with Penn’s official trademarks and is versed in their proper usage. Its team is able to create designs for goods such as low-cost promotional goods as well as fine gifts while ensuring that the final product accommodates these unique specifications. Departments may access the ordering site through the Penn Marketplace. All Promoversity products must be processed via the BEN Buys purchasing system. Additional product and pricing information as well as assistance with special orders is available by directly contacting Promoversity.

Please share this communication with appropriate personnel you feel would benefit from this information. Questions may be directed to Penn Purchasing Services by contacting Linda Greene. Linda is responsible for a variety of commodities including promotional goods along with print, publications, and interactive communications. She can be reached at 215-898-7796 or lindagre@upenn.edu.

Thank you for your support.

Mark Mills
Director, Penn Purchasing Services

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**Purchasing Card Training – Effective July 1, 2013**

In compliance with Financial Policy 2303: “Use of the Purchasing Card”, authorized purchasing cardholders are required to complete a mandatory training session prior to receiving their purchasing card. Cardholders are also required to complete mandatory bi-annual refresher training to retain a purchasing card.

Beginning July 1, 2013 the Card Program Administrator will review expiring cards for completion of the bi-annual training requirement. Reissued cards will be only be available to cardholders who have met this requirement.

To complete training go to: [http://knowledgelink.upenn.edu/](http://knowledgelink.upenn.edu/)

Search for course: Purchasing Card Knowledge Building FTD (COURSE UP.87022.ITEM.CRD003)

If you have any questions please feel free to email pcardsup@exchange.upenn.edu.

Respectfully,

Purchasing Services
Research Supplier Show
Tuesday, October 8, 2013

BRB II-III
421 Curie Boulevard
9:30 AM to 1:30 PM

Listen and hear about new products and promotions from our research laboratory supplies and service providers.

Food and Great Prizes

For more information visit:
www.purchasing.upenn.edu/news
In order to provide administrative support to the faculty, comply with the myriad of research related regulations and fund our research facilities, it is the policy of the University to charge all sponsored projects Facilities and Administrative Costs (F&A), also known as indirect costs, at the appropriate federally approved rate. F&A costs are those costs that cannot be directly associated with a specific project, but provide indirect support to the activity. The facility costs include utility costs, such as heating, cooling and electricity, maintenance and housekeeping costs, and interest and depreciation on buildings and equipment. The administrative component of the rate includes reimbursement for research support, such as departmental and school administration, the Office of Research Services, Institutional Review Board and Institutional Animal Care and Use Committee as well as University offices such as Purchasing, Payroll and Human Resources. In an environment of increasing regulatory compliance and facility costs, it is critical that the University be reimbursed for these expenditures.

The purpose of this memo is to inform you that effective July 1, 2013, Financial Policy 2116, Recovery of Facilities and Administrative (F &A) Costs, will be modified such that the Cognizant Dean or Resource Center Director will have the sole responsibility for approval of requests to accept F&A rates less than the appropriate federally negotiated rate for proposals submitted from their schools or centers. The transmittal e-form in PennERA proposal development module will continue to include a section regarding indirect cost. In accordance with university policy, if the F&A rate proposed is less than the appropriate federally negotiated rate, the approval of the Cognizant Dean or Resource Center Director should be documented unless the sponsor is a not-for-profit with a published policy of awarding F&A at a lower rate or (b) the proposal is for an industry-funded clinical trial.

We expect that these changes will facilitate the proposal submission process. Please contact Missy Peloso, Associate Vice Provost and Associate Vice President for Research Services (epeloso@upenn.edu) or Heather Lewis, Director of Pre-award (heatherl@upenn.edu) if you have any questions.
Quarterly Quiz

Instructions: To participate in the contest, please submit your answers to the questions at the right, found in this issue of The Bottom Line, via email to training@exchange.upenn.edu no later than November 1, 2013. The Winner will receive a gift certificate for two for the University Club!

Last Quarter’s Winner:

Helen S. Middleton, Financial Administrative Coordinator, Undergraduate Division, The Wharton School

1. List two benefits for having a Penn Travel Card.
2. On the Penn TEM Website, who is the Penn Travel and Expense Program Manager?
3. What is the new location for PennCard and the Computer Connection?
4. List the steps to follow if an employee has applied for, but not yet received, his or her Social Security No. (SSN)
5. How often is Purchasing Card training required?

BEN Helps Workspace

We would like to remind all BEN Financial users that BEN Helps Workspace is an additional BEN Financials support resource. This tool gives end-users the option to submit BEN Financials questions or issues using the internet instead of calling the BEN Helps phone line. The support application is available and can be accessed using your PennKey and Password. The application is available here:

http://BENHelps.finance.upenn.edu

Once a new support request is saved, the user will receive a confirmation email and the ticket will be routed to the BEN Helps team. Subsequent emails will be sent to the user each time the ticket is updated. If necessary, the user may update the ticket by responding to the email or update the ticket directly in the BEN Helps Workspace.

To the right is a Quick Reference Guide showing the brief steps that need to be completed in order to create a new support ticket. We encourage the continued use of the BEN Knows website and you may still call BEN Helps at 6-HELP (215-746-4357).

Thank you,
Financial Systems