



# The Bottom Line

## Change to University Competitive Bid Threshold

Effective January 1, 2019, Penn is increasing its competitive bid requirement threshold from \$5,000 to \$10,000. Concurrently, Penn is adjusting the receipt requirement in BEN from \$5,000 to \$10,000.

While Penn purchasers are encouraged to solicit bids whenever possible regardless of dollar value, the change enables administrators to focus their attention on higher-value transactions.

This policy change does not directly impact any other thresholds, including any lower bid or review thresholds locally established by the Schools or Centers, School/Center PO approval hierarchies, or accounting treatments. However, this increase in the University-level threshold is an opportunity for Schools and Centers to review and adjust local policy and hierarchy at their discretion, as long as local management is consistent with the \$10,000 competitive bid threshold. Schools and Centers may maintain stricter competitive bid rules at their discretion.

Purchases made using funds from sponsored projects must be consistent with Penn's Sponsored Projects Policies, including the retention of documentation of the purchase and information related to how the purchase benefits the sponsored project as well as support for any allocation decisions if multiple funds are being used for the purchase. These requirements are independent of the competitive bid process.

This change will be reflected in [Policy #2308 – Competitive Bidding](#) of Penn's [Financial Policy Manual](#).

## PROCARD JOURNALS HOLIDAY POSTING

- Journals imported into BEN on **12/14/18** post on **12/21/18**
- Journals imported into BEN on **12/21/18** post on **1/4/19**
- Journals imported into BEN on **12/28/18** post on **1/4/19**

## PENN TRANSACTION AUTHORIZATION CARDS (TAC) TO BE PHASED-OUT

As most of you know our former PDA Forms have been transitioned to the Penn Marketplace (now Non-PO Payment Requests). The primary reason for TAC Cards was to approve these PDA Forms. A decision has been made to phase out these cards. We understand TAC Cards are used for other purposes listed below:

- PDA-FC Form (Foreign currency payment requests)
- Request for Replenishment of Petty Cash
- Penn Bookstore
- Computer Connection
- The Inn at Penn
- Sheraton University City
- PennCard
- ULAR – Request to Transfer Animal(s)



In the future we will communicate new procedures as we transition off the TAC Card. All Cards having an expiration date of 12/18 and 3/19 will be extended to 06/19 (new cards will not be printed). We will communicate this extension to organizations supporting the purposes above. If you have any additional purposes for your TAC Card not listed above or have any questions please reach out to Mike Popko at 215-898-1443 or [mpopko@upenn.edu](mailto:mpopko@upenn.edu).

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### HCM Project Revamps Its Communications

We're excited to announce changes to ways you receive information on the HCM Transformation Initiative. First we've launched two new websites, one for [Workday@Penn](#) and another for the [Penn Employee Solution Center](#).

The new Workday site has expanded navigation and the latest information on the project and its timeline, outbound communications channels, engagement activities, Workday tools for data planning, and training. It's intended to be flexible as we refine and augment it further over the next few months for go-live in July 2019 and beyond. Note that much of the rich content needs your PennKey.

Two new newsletters alternate with each other on a biweekly basis so that each is monthly.

[Workday Advance](#) publishes robust information for HCM stakeholders to help prepare for the changes ahead. We strongly encourage Bottom Line readers to stay up to date with [Workday Advance](#). [Subscribe](#) to Advance.



[HCM Flash](#) informs the casual Penn community members with high-level information on milestones and events. Subscribers of the retired [HCM Update](#) receive the Flash. [Subscribe](#) to Flash.



### HCM Change Agent Network Your Gateway for Local Demos

Do you want to know what Employee Self-Service is all about and see what you as an "Employee as Self" can do in Workday@Penn? Ask your local change agent to set up a video demonstration for your school or center.

Change agents have access to videos, presentations, and other tools that will help you and your area stay informed about Workday@Penn and discuss its many convenient benefits for the end user. Find out who your change agents are [here](#).

### Check out the New Penn Employee Solution Center Website

The Penn Employee Solution Center has a new [website](#). While visitors to the old address are redirected to the new website, we ask that you update the links in your particular websites and materials as soon as is convenient. The Solution Center is available at 215-898-7372 or [hcmsolutioncenter@upenn.edu](mailto:hcmsolutioncenter@upenn.edu).



## Penn Employee Solution Center

*One Call. One Team. One Penn.*

### PLEASE DO NOT USE PAPER I-9 FORMS

The Human Resources Records Department has recently received a large number of paper I-9s. Please remember these paper forms are no longer accepted. All I-9's should be completed electronically via Equifax. The employee should complete Section 1 of the I-9 using the online Employment Center <https://www.hr.upenn.edu/i9>. After the employee completes section 1 of the I-9, the employee's department completes Section 2 of the I-9 electronically using Equifax's I-9 Management System at <https://www.hr.upenn.edu/for-managers/hiring-and-recruitment/hr-i9-express>.

# Office of the Comptroller

## PAPERLESS W-2s

Did you know that individuals can elect not to have their W-2 printed and mailed to them? ADP, our W-2 provider, offers individuals the option to suppress the printing of your W-2 and allows you to securely view and print your W-2 from your personal computer. **By going paperless, you avoid identity theft and mail delays!**

Follow these instructions to log-in to ADP W-2 services:

- Click on **'My Tax Info'** in the **'My Pay'** section at [U@Penn](http://U@Penn).
- Login with your **PennKey** and **Password**.
- Enter your birthdate and **last four digits of your SSN** and click **'Continue'**.
- Click **'Continue'** on the next screen.
- Click on the link that says **'Click here for W-2 information for tax years 2015 and later'**. This will take you to the ADP site.
- The first page will be the ADP Dashboard.
- **Hover over your name** in the upper right hand corner and select **'Settings'**.
- Under **'Contact Preferences'**, make sure your **email address is correct** in the box. If not, click **'Edit'** to add or update.
- Next under **'Go Paperless'**, click the slider to agree to **'Receive paperless statements' and to be 'Notified by Email'**. This will open a new window, where you **must check the box to 'Receive Paperless Annual Tax Statements'** and click on **'I agree'**.

Remember to close ALL browser windows when you have finished making your updates to protect your personal information.

You have until December 31, 2018 to select this option for your 2018 W-2. Once you opt out of having your W-2 mailed, you will continue to receive them electronically each year until you elect to receive a paper W-2 once more.

As a reminder, W-2 forms for tax year 2012 and prior will remain on the U@Penn portal under "My Tax Info". Tax forms for the current and prior two years are available on the ADP site.

## W-2 ADDRESS

W-2 forms are mailed to the ~~address~~ on file within the PennWorks/Personnel/Payroll System. If you have moved or need to update your address, please visit the [U@Penn](http://U@Penn) website. Under 'My Personal Data', click 'My Profile' to change your address or follow the instructions in the adjacent article to opt out of receiving a paper W-2 form and receive your W-2 electronically.

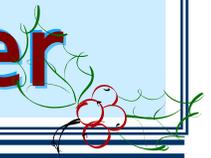
## TREATY EXEMPTIONS

Tax Treaty exemptions are granted on a calendar year basis for certain types of payments such as scholarship/fellowships and employment income. Please advise all **monthly paid** individuals who believe they are entitled to an exemption from Federal taxes to report to the Tax Office. These individuals must bring their Penn ID to confirm their eligibility and sign the appropriate Tax Treaty documents for the 2019 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 2019 payroll, students and employees must visit the Tax Office, 3451 Walnut St, Room 310, by Friday, January 18, 2019.** 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 2019 deadline.** The individual can claim the exemption when filing their 2019 tax return. Please call the Tax Office with any questions or concerns at 215-898-6291 or submit a HelpDesk inquiry at:

<https://apps.finance.upenn.edu:44305/TaxHelpDesk/>

# Office of the Comptroller



## Payroll 2018 Year End Dates

### Weekly Year-End Schedule for eTimesheets and OTR

2018 Period Begin Date	2018 Period End Date	Weekly Pay Dated	eTimeSheets			Time Reporting by 12:00 p.m.	Database Changes by 2:00 p.m.
			Role	Submit By	Approve From/To		
12/17/2018	12/23/2018	12/28/18	Employee	12/23/18 9:00 p.m.	n/a	12/24/18	12/24/18
			Supervisor	12/23/18 9:00 p.m.	12/19 – 12/24 6:45 a.m.		
			ORG Administrator	12/23/18 9:00 p.m.	12/19 – 12/24 9:45 a.m.		
12/24/2018	12/30/2018	01/04/2019	Employee	12/30/18 9:00 p.m.	n/a	12/31/18	12/31/18
			Supervisor	12/30/18 9:00 p.m.	12/26 - 12/31 6:45 a.m.		
			ORG Administrator	12/30/18 9:00 p.m.	12/26 - 12/31 9:45 a.m.		

#### OVERPAYMENTS

- All overpayments must be communicated to the Payroll Office by **12/20/18** and must be paid in full by January 4, 2019.
- Checks for the **full amount** are made payable to the *Trustees of the University of Pennsylvania*.
- Overpayments reported to the Payroll Office after the deadline of 12/20/18 will be considered “prior year” overpayments and will have further tax implications to the employee.

#### OFF CYCLE PAYMENTS

- Off cycle requests must be submitted to the Payroll Dept. by 5 p.m. on December 20, 2018.

#### ADDRESS CHANGES

- **Deadline is 1/04/19.** We ask that employee’s change their own address by logging onto the U@Penn website at [www.upenn.edu/u@penn](http://www.upenn.edu/u@penn) and click on the **My Profile** link in the Personal Resources, Health and Welfare section in the left hand column.

- Alternatively, your employees may contact their BA and request the BA make the appropriate address change in the payroll system.
- W-2 forms are sent to the **permanent address** listed in the PennWorks. If not available, the **current address** is used.

#### PAYROLL OFFICE HOURS

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

Mon. & Tues. 12/24/18 - 12/25/18 Closed

Wed. 12/26/18 8:00 a.m. – 12:00 p.m.

Thurs. thru Mon. 12/27/18 – 01/01/19 Closed

**Please note: No window hours.**

#### January 2019 Payroll

Weekly pay from pay period ending **1/06/2019** through **1/20/19** will run on **Tuesday’s at 3 p.m.** due to end of year processing and the MLK Holiday. We will resume payroll processing on **Monday’s** starting **1/28/19**.

# Office of the Comptroller



## Accounts Payable 2018 Year End 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, December 31<sup>st</sup>, 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 5, 2018 at 5:00 p.m.

- Final day to request Final Closing of Purchase Orders & request to correct and reverse receipts

### Wednesday, December 12, 2018 5:00 p.m.

- Purchase Order invoices

### Monday, December 18, 2018 at 5:00 p.m.

- Will Calls

### AP COVERAGE FOR WINTER BREAK

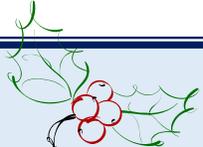
The AP office will be staffed over the Winter Break to take phone calls and respond to emails only as follows:

Mon. 12/24/18	Closed
Tues. 12/25/18	Closed
Wed. 12/26/18	Closed
Thurs. 12/28/18	8:00 a.m. – 12:00 p.m.
Fri. 12/29/18	Closed
Mon. 01/01/18	Closed

**Please note: There will be no AP window hours.\***

*\*If you have an emergency you may call the Helpdesk (215-898-2626) or e-mail [DoFAPSupp@pobox.upenn.edu](mailto:DoFAPSupp@pobox.upenn.edu) during office hours.*

## GIFTS TO EMPLOYEES



As we approach the holiday season, Tax and International Operations would like to remind you that giving gift cards to faculty, staff, or students is against University policy. Under IRS regulations, gift cards provided by employers to employees are deemed to be wages and are subject to employment taxes without regard to their value.

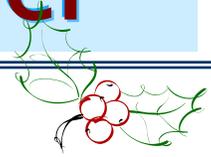
Please refer the Comptroller's web site to review the policy associated with the distributions of gifts to employees:

[Policy #2326 Gifts Based on University/Employee Relationship.](#)

If you have any additional questions, please contact Tax and International Operations at 898-6291 or submit a Help Desk inquiry at:

<https://apps.finance.upenn.edu:44305/TaxHelpDesk/>

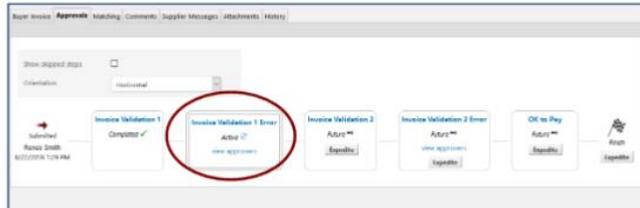
# Office of the Comptroller



## HOW TO CORRECT INVOICE VALIDATION 1 ERROR

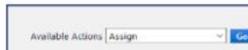
Last updated November 20, 2018

A Non-PO Payment Requests will go into the Invoice Validation 1 Error workflow step if there is an issue with an incorrect segment of the account string, i.e. if the Preparer submits the Non-PO Payment Request with an incorrect account string it will be sent to Approval Level 1 in an Invoice Validation 1 Error workflow step. See the screens shots below for how to correct the Invoice Validation 1 Error.

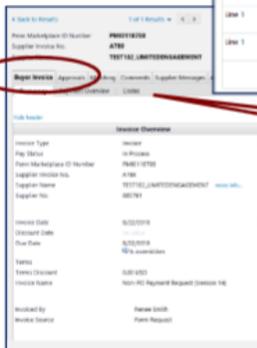


- Approval Level 1 will receive an email notification of the error.
- The Level 1 Approver will have to take the following steps to correct the account string:

1. Click **Assign** in the Available Actions drop-down box

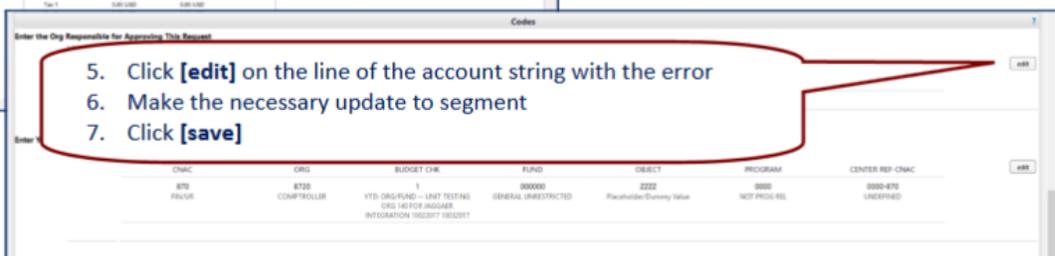


2. Click on the **History** tab to see the reason the account string failed



3. Go to the **Buyer Invoice** tab

4. Scroll down to the **Codes** section



5. Click **[edit]** on the line of the account string with the error
6. Make the necessary update to segment
7. Click **[save]**

### Reasons for Validation 1 Error:

- ZZZZ cannot be used with this object code
- Frozen Fund
- BC 2 can only be used with this fund
- BC 4 can only be used with this fund
- Failed Rule 56- this object code can only be used with grant funds
- 403- if Non-PO payment request is submitted outside of the hours of Mon-Sat 8am to 8pm (In Available Actions - click "approve and complete" for this error)

Questions/Comments  
Contact Accounts Payable  
215-898-2626  
DoFAPSupp@pobox.upenn.edu

Click here for 'How to Correct Invoice Validation 1 Error' QRG  
[https://www.finance.upenn.edu/sites/default/files/QRG\\_Invoice\\_Validation\\_1\\_Error.pdf](https://www.finance.upenn.edu/sites/default/files/QRG_Invoice_Validation_1_Error.pdf)

## DECEMBER 2018 YEAR END GIFT PROCESSING DEADLINES

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 2018 – FY19 gifts (*need December 31 postmark*) IRS rules require that year-end gifts be postmarked on or before December 31, 2018
- 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 deposit and process during this time period**

- **January 18:** Gifts Office will reopen for deliveries

- *Please Note: Depending on volume, GAA may continue to process 12/31 activity*

- **January 22:** Begin preliminary reporting

Notify Jean Suta in Security Gift Office (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 4 p.m. on December 31**.

Should you have any questions on this information, please contact Kate Micklow Harwan (8-3104), Maria Perkins (8-8687) or Jean Suta (8-7254).

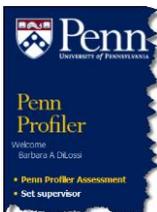
GIFTS ACCOUNTING &  
ADMINISTRATION AND RECORDS  
WINTER BREAK SCHEDULE

Mon.	12/24/18	Closed
Tues.	12/25/18	Closed
Wed.	12/26/18	9:00 – 3:00
Thurs.	12/27/18	9:00 – 3:00
Fri.	12/28/18	9:00 – 3:00
Mon	12/31/18	9:00 – 1:00

UNIVERSITY  
CASHIER OFFICE  
WINTER BREAK SCHEDULE

Mon.	12/24/18	Closed
Tues.	12/25/18	Closed
Wed.	12/26/18	Closed
Thurs.	12/27/18	Closed
Fri.	12/28/18	Closed
Mon.	12/31/18	Closed

## How to Add/ Change Your Supervisor in Knowledge Link



To add or change the Supervisor in Knowledge Link follow these steps:

- From the [Knowledge Link](#) website, click on 'Penn Profiler'
- Click on 'LOGIN'
- Click on 'Set supervisor'
- Update/Enter the new supervisor
- Click on [Submit]





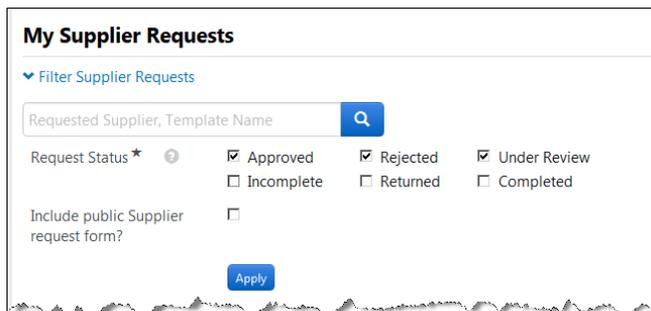
## MY SUPPLIER REQUESTS – USER INTERFACE ENHANCEMENTS

Users now have more options to view Supplier Requests they initiate on the My Supplier Requests page.



This added feature contains a new search filter and the ability to sort results.

When the Filter Supplier Request link is expanded, users will now see a new search filter above the selected statuses that can search the supplier requests by the requested Supplier name.



Also, most columns on the page can now be selected for sorting the list in ascending or descending order.

### No Personal Purchases via Amazon Business Account

Please Note: The University's Amazon Business account is limited to those individuals approved to use a Purchasing Card for the purchase of goods/services on behalf of the University.

**The Amazon Business account is for business purposes only. No personal purchases are to be made through this account.**

For more information about 'How to Become a University Amazon Business Account Participant', visit <https://cms.business-services.upenn.edu/purchasing/making-purchases/purchasing-basics/amazon-business-account.html>.

## NEW COLLABORATIVE RELATIONSHIP FOR LABORATORY SUPPLIES AND EQUIPMENT

Purchasing Services is pleased to announce a new contract for ordering lab supplies, which resulted from a comprehensive, competitive bid process that included collaboration from Penn's research community. This new collaboration brings together Fisher Scientific and EMSCO Scientific to form a new EMSCO-Fisher supply chain model serving Penn. The University will benefit from having a West Philadelphia-based, minority-owned lab supplies distributor to service the account. This aligns Penn with a major-market force to provide best-in-class, local service while reducing overall cost.

Under the new agreement, Penn will immediately enjoy a host of benefits, including but not limited to: improved overall pricing, strengthened local service and support staff, and an expanded diversity purchasing position. In the longer term, Penn will enjoy additional services such as emergency warehousing and local access to cold storage functions.

For those who have experienced working with EMSCO in recent years, you may have noticed the positive impact the new leadership team has brought to the company. This new team and its work with Fisher Scientific were critical to making such an innovative model viable at Penn.

All parties are enabling and testing systems to ensure a smooth transition to the new purchasing model in the coming weeks. It is expected that there will be minimal impact to the order-to-fulfillment process. Details about the changes you can expect to see to the process of ordering, fulfillment, and ongoing service and support are posted to [Penn Purchasing Services website](#).

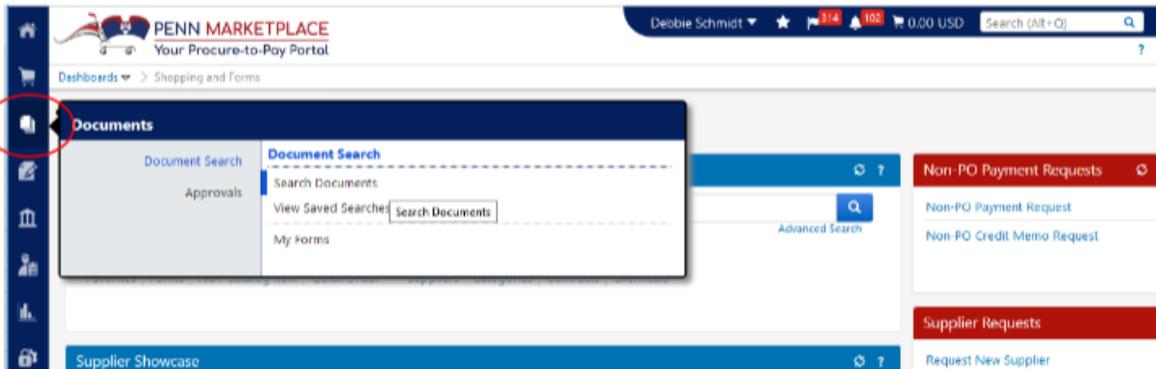
In addition, details about the new arrangement have been posted in the [EMSCO/Fisher Quick Reference Guide](#), which can also be found on the Purchasing Services [EMSCO/Fisher webpage](#). This includes changes you can expect to see to the ordering process; how to manage favorite's lists; where to go for service and support; and other steps that can be taken as the new ordering site is launched.



## HOW TO RESEND AN APPROVED PURCHASE ORDER TO A SUPPLIER

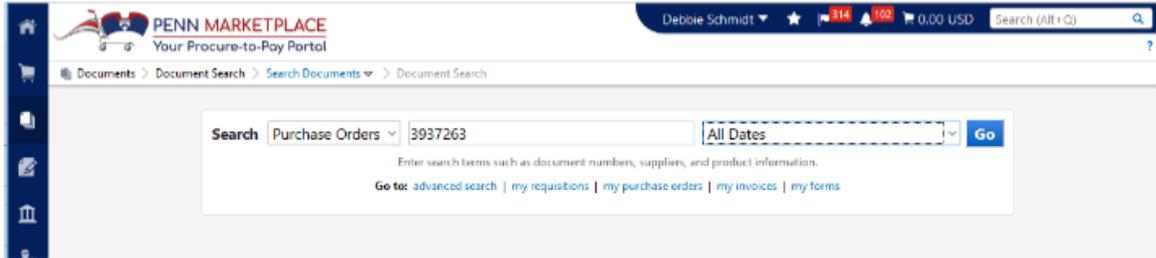
Users may resend an approved PO to the Supplier from within the Penn Marketplace following these instructions:

Enter Penn Marketplace < Search on Documents, Select Purchase Orders



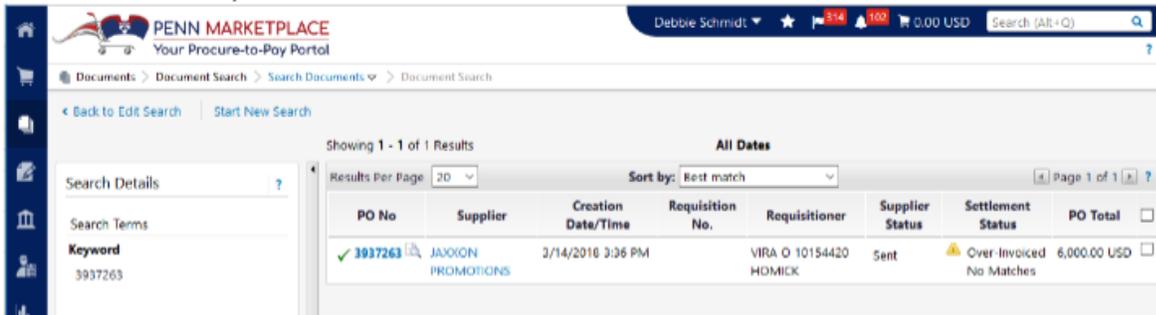
The screenshot shows the Penn Marketplace home page. The 'Documents' menu item in the left sidebar is circled in red. The main content area shows a 'Document Search' dropdown menu with options: 'Document Search', 'Approvals', 'View Saved Searches', and 'My Forms'. The 'Document Search' option is selected, and a search box is visible.

Enter Purchase Order Number



The screenshot shows the search page. The 'Purchase Orders' dropdown menu is selected, and the search term '3937263' is entered. The 'Go' button is visible. Below the search box, there is a note: 'Enter search terms such as document numbers, suppliers, and product information. Go to: advanced search | my requisitions | my purchase orders | my invoices | my forms'.

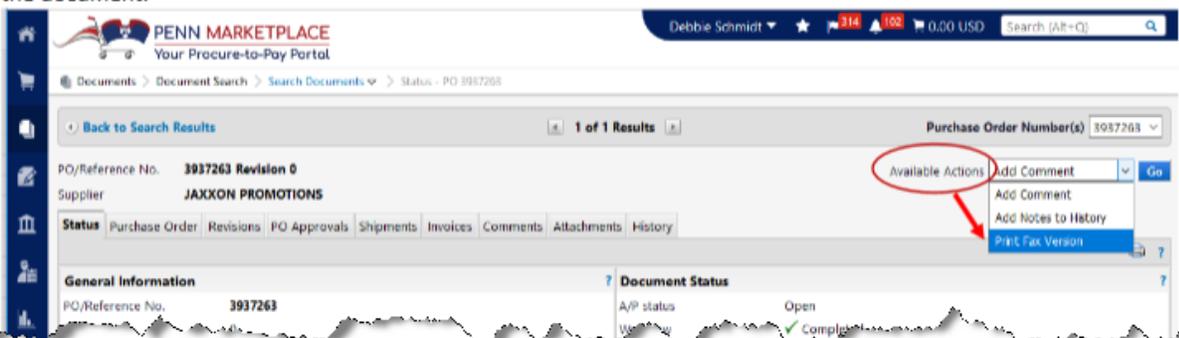
Click on the PO No to open



The screenshot shows the search results page. A table with one result is displayed. The 'PO No' column contains '3937263' with a checkmark icon next to it. The 'Supplier' column contains 'JAXXON PROMOTIONS'. The 'Creation Date/Time' column contains '3/14/2016 3:36 PM'. The 'Requisition No.' column contains 'VIRA O 10154420'. The 'Requisitioner' column contains 'HDMICK'. The 'Supplier Status' column contains 'Sent'. The 'Settlement Status' column contains 'Over-Invoiced No Matches'. The 'PO Total' column contains '6,000.00 USD'.

PO No	Supplier	Creation Date/Time	Requisition No.	Requisitioner	Supplier Status	Settlement Status	PO Total
✓ 3937263	JAXXON PROMOTIONS	3/14/2016 3:36 PM	VIRA O 10154420	HDMICK	Sent	Over-Invoiced No Matches	6,000.00 USD

Click on Available Actions from drop down box and select Print Fax Version, click Go, then you can print the document.



The screenshot shows the document details page for PO 3937263. The 'Available Actions' dropdown menu is open, and the 'Print Fax Version' option is highlighted with a red circle and arrow. The 'Go' button is visible next to the dropdown menu.



The "Search Supplier List" used in Invoice Inquiry, PO Manager, & Requisitioner has been expanded, and the payment method & terms are now displayed for each active pay site. You can find the navigation path below for each of the responsibilities:

- Invoice Inquiry>Suppliers
- PO Manager>Inquiry>Suppliers
- Requisitioner>Supplier List

Once you search for the Supplier as you currently do today, click on the "Y" in the "Pay Sites" column to drill down and view the active pay sites for that particular Supplier.

**Simple Search**

Note that the search is case insensitive

Supplier Name

Supplier Number

SupplierType

Supplier Name ▲	Supplier Number	Taxpayer ID	SupplierType	Pay Sites	P.O. Sites	Minority Owned	Local Community	Woman Owned	Small Business	Limited Engagement	Contract
CELLCONTROL, INC	605810	*****1139	CORPORATION/BUSINESS ENTITY	Y	N		N	N	N		N

You will see the 2 new columns at the end: **"Payment Method" & "Terms"**

Pay Sites											
Name	Addr1	Addr2	City	State	Zip Code	Phone	Fax	Email Address	Payment Method	Terms	
Baton Rouge Off	7117 Florida Blvd	Suite 200	Baton Rouge	LA	70806	(225)2150099			EFT	Net 30	

FYI: There are 5 possibilities that will appear in the Payment Method column:

- ePayables
- Paymode
- Check
- Wire
- EFT (EFT is ACH/Direct Deposit)

If you have any questions related to the new Supplier Search functionality in BEN Financials, please contact BEN Helps at 6-HELP (215-746-4357), or enter a ticket via BEN Helps Online Support at <http://BENHelps.finance.upenn.edu>.

If you have a question related to the how a Supplier has been set up in BEN Financials, please contact [SupplierSupport@upenn.edu](mailto:SupplierSupport@upenn.edu).

Penn Purchasing Services is pleased to announce the ability to apply directly on the J.P. Morgan Chase online portal for the University's Purchasing Card (P-Card) and Meeting Card. The online application offers the ability to streamline the P-Card/Meeting Card application process, transitioning from a paper-based application process to a secure online application.

The card applicant now will be able to enter his or her own information directly into the application as well as indicating a first approver of the card application from a drop-down box of a predetermined set of designated approvers per School/Center. The applicant's immediate supervisor is most likely the first approver. The first approver reviews the application, selects the default account code from the drop-down box for each segment, and forwards the application to the Senior BA or second approver, also listed in a drop-down box from which the first approver's name cannot be selected.

When the application is approved by the secondary approval level, it is automatically routed to the Card Program Administrator in Purchasing Services for final approval and submitted to the bank for processing. At any point in the application process, the application may be rejected with notes indicating the reason for the rejection. Two approvers are needed for every application and have been preset in the system. Note: The [Payment Access Form](#) may be submitted at any time to amend the list of School/Center approvers.

A PaymentNet system email notification is sent to the first and second approvers when there is an application to approve. There is a seven-day window for the application to be approved.

At this juncture, the Card Program Administrator has the ability to send out another email notification to the approver to move the process along or forward it to another approver if needed.

Additionally, an application approver who does not have any other PaymentNet role will only have access to PaymentNet as an application approver and will not have access to any other data within PaymentNet.

A new application approver will receive two emails from PaymentNet once an account has been created. The first email will include a user ID, and the second email will contain a temporary password so that an applicant can then create his or her own unique password to login to the PaymentNet system.

The online card application link along with directions for applicants and approvers can be found on the Purchasing website [here](#).

If you have any questions, please contact the Purchasing Card Administrator at [PurchasingCardSupport@upenn.edu](mailto:PurchasingCardSupport@upenn.edu)

J.P.Morgan PaymentNet®



# ISC Service Information Sessions - Sign Up Below

Thank you for responding to our ISC Services Survey last month, which helped us understand your priorities for engaging with our service providers. The top 4 topics were:

- Data Analytics and Administration
- Networking
- Access, Accounts & Security
- O365 (tied with Access, Accounts & Security)

Based on the survey, we will be scheduling monthly events for you to discuss services with the respective providers, with the first service/project discussion already conducted in November, for the IAM Project (visit the website).

There will be two sessions for each Service topic and all sessions will be held in the Bits and Pieces Room, 306 Sansom Place West. Below please find a link for you to register to attend any or all Service discussions:

## Data Analytics and Administration

Friday, December 14th, 2018

11:00 a.m. - 12:00 p.m.

Tuesday, December 18th, 2018

1:00 - 2:00 p.m.

## Information Security – Intrusion Detection, Security Hotline

Wednesday, January 16th, 2019

12:00 - 1:00 p.m.

Thursday, January 24th, 2019

12:00 - 1:00 p.m.

## Networking

Wednesday, January 9th, 2019

12:00 - 1:00 p.m.

Wednesday, January 30th, 2019

1:00 - 2:00 p.m.

## O365

Tuesday, February 5th, 2019

12:00 - 1:00 p.m.

Wednesday, February 20th, 2019

1:00 - 2:00 p.m.

## Registration Information:

Title: ISC Service Events

Item ID: UP.91028.ISCServicesEvents

Knowledge Link Registration Link:

[Knowledge Link Registration](#)

For more information regarding ISC Services, please contact [ISC Services](#).

*Tom Murphy*

*Vice President of Information Technology &  
University Chief Information Officer*

## Upcoming Business Objects Classes

The next set of full day Business Objects classes:

### Introduction Business Objects

Monday, February 4, 2019

9:30 a.m. – 4:30 p.m. \$450

### Advanced Business Objects

Tuesday, February 5, 2019

9:30 a.m. – 4:30 p.m. \$450

To register email [learnit@isc.upenn](mailto:learnit@isc.upenn). Seats fill up fast!

## ISC Training Lab

ISC has updated its training lab! The lab features a new 75" Samsung monitor, a modern instructor station, 14 Dell Optiplex workstations with highspeed Internet connectivity and on-site technical support. The lab is available for both day and evening rental to members of the Penn community, private companies, and nonprofit agencies at reasonable rates.

To schedule a tour or to receive information on discounted daily, weekly and extended session rates contact us at (215) 573-3102 or [learnit@isc.upenn.edu](mailto:learnit@isc.upenn.edu).

# New NIH Parent Funding Opportunity Announcements Issued



NIH has issued new Parent Announcements for the R01, R03, and R21 mechanisms. These announcements are available for selection now in PennERA for Standard Receipt Deadlines beginning in February 2019. For applications using earlier Standard Receipt Deadlines (e.g., AIDS-related submissions for 1/7/19), the current FOA should continue to be used.

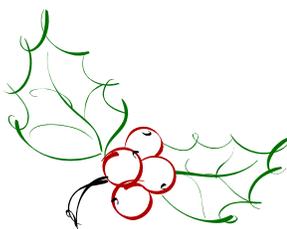
FOA Title	Previous FOA	New FOA
Parent RO1 Clinical Trail Not Allowed	PA-18-484	PA-19-056
Parent RO1 Clinical Trail Required	PA-18-345	PA-19-055
Parent RO3 Clinical Trail Not Allowed	PA-18-488	PA-19-052
Parent R21 Clinical Trail Not Allowed	PA-18-489	PA-19-053
Parent R21 Clinical Trail Required	PA-18-344	PA-19-054

Existing records in PennERA using the current FOA's now warn users that the selected FOA is out of date. This warning is visible on Setup Questions.



**The opportunity schema for this proposal is out of date. Please re-select the opportunity to refresh the schema. An updated schema is required for successful submission.**

Follow these steps to either refresh the existing FOA schema or select the new FOA:



- Choose Get Opportunity Number in the Submission Mechanism/Form Information section on the Setup Questions screen.
  - For Standard Receipt Deadlines prior to 2/5/19, keep the existing FOA.
  - For Deadlines on or after 2/5/19, search for the new FOA and select.
- Save the opportunity screen and allow Setup Questions to refresh.
  - Note that all the previous existing links to screens in the record will initially disappear but will be available again after the steps below are completed.
  - Usually no data entry or uploads are lost as a result of changing the FOA.
- Review the answers on Setup Questions, then save this screen.

NIH has not yet issued guidance for those submitting under the Continuous or Late Submission policies. In the past, the FOA associated with the Standard Receipt Date is the correct FOA to use, regardless of when the application is submitted. We expect NIH will announce a cutoff date of 1/25/19 for all applications using the old FOA's and submitted under one of these two policies.

Parent Announcement information is also available at NIH's website:

[https://grants.nih.gov/grants/guide/parent\\_announcements.htm](https://grants.nih.gov/grants/guide/parent_announcements.htm).

If you have any questions, please be in touch with [PennERAhelp@lists.upenn.edu](mailto:PennERAhelp@lists.upenn.edu).

## ***Did You Know...***

... the 26-character account strings where BEN Financials activity is posted use only numerals, except for the following:

**CNAC:** Numeric only.

**ORG:** Numeric only, except for org "SUSP" where certain suspense balances are posted.

**BC:** Numeric only.

**Fund:** Numeric only.

**Object:** Numeric only.

**Program:** ALPHANUMERIC.

Examples of program values which include letters are: Capital Project programs, Country programs, and MOOC programs.

**CREF:** Numeric only.

The "T" and "ZZZ" segments are system-only default segments, and should never have any balances posted to them.

**Please note that if you are entering a range and wish to report on all activity at the program level, please use "0000 through ZZZZ", not "0000 through 9999" in the Program.**

...a **Quick Reference Guide (QRG)** is available for many of the financial activities performed in **BEN Financials** including the following:

- BEN Assets – Mass Changes QRG
- Rev/Exp Inquiry QRG
- View Funds Available QRG
- Journal Inquiry/Reporting QRG
- Manual Journal Entry QRG
- Budget Entry QRG
- Freeze Grant QRG
- Entering a Req for Equipment QRG
- Supplier Inquiry QRG
- Managing Holds QRG

All can be found at the Financial Training Department's Documentation page:

<https://www.finance.upenn.edu/financial-training-department>

## **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 [doftraining@pobox.upenn.edu](mailto:doftraining@pobox.upenn.edu) no later than **February 1, 2019**

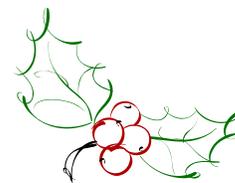
**The Winner will receive a gift certificate for two for the University Club!**

1. What is the new competitive bid threshold?
2. What is the last day a Purchase Order invoice should be received to ensure it is processed before December 31<sup>st</sup>?
3. What is the Penn Employee Solution Center phone number?
4. What are the two new columns added to the Search Supplier List?
5. What are the four ISC Information Sessions?

**Last Quarter's Winner:  
Congratulations!**

Brandy Smith  
Grants Manager

Department of Medicine  
Central Research Administration/ Special OPs



# BEN Knows...

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

## To Check the Status of an eForm:

Go to: <http://www.upenn.edu/computing/da/eforms>

### If you are the Initiator/ Submitter:

- Click on the 'My eForms status' link on the left
- The list will show ALL eForms you submitted (BEN Financials, Data Warehouse, etc.)
- Find the eForm you want to review
- Click on the 'Route Log' icon on the right to view the routing history

### If you are an Approver:

- Under 'For Supervisor and Administrators' section, click on the 'eForms 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 'eForms 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 located in the last column
- You can also use the 'Outbox' to view all eForms which have been processed to date

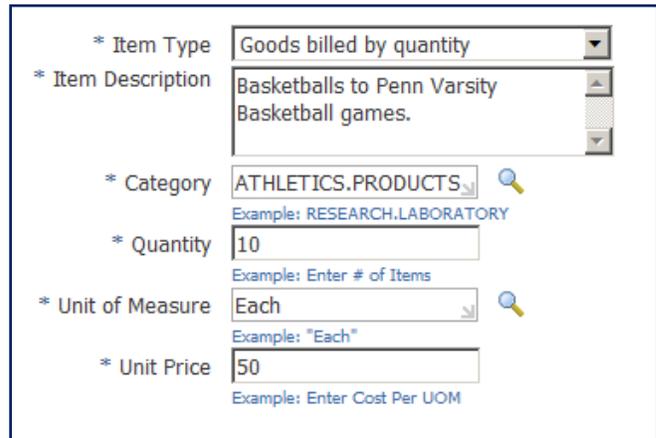
**NOTE:** To view any notes, click on the ID number to view the eForm or month

- Place a check in the 'Save this schedule' box to save your schedule
- Provide a **unique name** for each schedule you save
- Enter a **description** of your schedule
- Click **OK** to return to the 'Submit Request' window
- Click [**Submit**] to save your request and return to the 'Requests' window

## For a Non-Marketplace Requisition, when Do I Use "Goods Billed by Quantity" and "Goods or Services Billed by Amount"?

It is important to select the appropriate 'Item Type' when creating a 'Non-Marketplace' requisition. Below are examples of when to use 'Goods Billed by Quantity' and 'Goods or Services Billed by Amount'.

- Select the Item Type '**Goods billed by quantity**' when you ordering items that will be billed by the Supplier using the 'quantity', i.e. 5 of something, 10 of something, etc.



\* Item Type: Goods billed by quantity  
 \* Item Description: Basketballs to Penn Varsity Basketball games.  
 \* Category: ATHLETICS.PRODUCTS  
 Example: RESEARCH.LABORATORY  
 \* Quantity: 10  
 Example: Enter # of Items  
 \* Unit of Measure: Each  
 Example: "Each"  
 \* Unit Price: 50  
 Example: Enter Cost Per UOM

- Select the Item Type '**Goods or services billed by amount**' when you are ordering something that will be billed by the Supplier using the 'amount', i.e. \$500, \$1,000, etc.

For more information, go to the [Financial Training Department](#) website, Documentation page, and click on the 'Requisitioner User Guide'.

## Quarterly Quote



*"Either write something worth reading or do something worth writing."*  
**Benjamin Franklin**