



TRAINING AND PRACTICE LABS

Those who hold security roles are required to attend training in order to perform their job after go-live. If you have not done so, please register for the required training. More information is here:

<https://www.workday.upenn.edu/home/training/training-schedule>
(PennKey required)

Practice Labs are underway for those who want additional hands-on assistance before go-live. Small-sized labs ensure personal attention. The schedule and the registration links are available here:

<https://www.workday.upenn.edu/home/training/practice-labs>
(PennKey required)

After July 1, 2019 look for the announcement of 'Office Hours'.

ROLE RAPID ENTRY

In Workday, employee compensation will not be determined by amounts on distribution lines; it is based on annual salary, hourly rate, and term. For data conversion of exempt workers, annual salary and term are what determine an individual's pay. For regular exempt staff the term will be 12 months in Workday. For Academics, Post Docs and Graduate Students, the term is converted from PennWorks (9/9, 9/12, 10/10, and 12/12).

For data conversion from PennWorks Salary Increase to Workday@Penn production, we will be using the PennWorks Salary Increase (RRE) distribution lines to determine the Workday costing allocations beginning on July 1.

Detailed instructions can be found here:

<https://www.workday.upenn.edu/home/toolbox/key-business-changes>
(PennKey required)

SERVICE DELIVERY:

ONBOARD@PENN AND THE PENN EMPLOYEE SOLUTION CENTER

The Penn Employee Solution Center and Onboard@Penn are major parts of the service delivery component designed to improve Penn's people-centered services and provide consistent service across campus. The Solution Center is your first call for assistant during cutover and after go-live; please contact by phone, (215) 898-7372, or email, HCMSolutionCenter@upenn.edu, with any questions.

Onboard@Penn is fully launched to the entire University as of June 1. Specialists help complete the in-person onboarding process for new faculty, staff, student workers, and temporary workers. Current Equifax users will have access to complete I-9s through June 14 if necessary.

SUMMER UNDERGRADUATE RESEARCH FELLOWS

Instructions for handling student stipends by the student's primary home school business office this summer for these students, both those without a PennWorks record or with a student worker role already in PennWorks, can be found on this page:

<https://www.workday.upenn.edu/home/toolbox/key-business-changes>
(PennKey required)

In This Issue...

Review Supervisory Org Names	Page 2
Non-Penn Workers	Page 2
Payroll Reallocations	Page 2
Payroll and Payroll Tax Fact Sheet	Page 3
Workday Implementation: 2019 Cutover Instructions	Page 4
Special Acknowledgement.....	Page 7



REVIEW SUPERVISORY ORG NAMES WITH CONVENTION GUIDANCE

Please review the names of your supervisory organizations. These names will be visible to all Workday users at go-live. The Hierarchy Tool allows you to assign more specific names to Supervisory Orgs. Here is guidance:

- Description should follow the format of a Department “-“ Organization Purpose
- Organization codes and manager name are automatically displayed and should not be included in the description
- Descriptions need not be unique across the University
- Examples:
 - Department of English – Graduate Administration
 - Benefits – Retirement
 - Benefits – Health and Welfare
- Descriptions will default to the legacy org of the supervisor (if not updated in the Hierarchy Tool) and can be updated post go-live

NON-PENN WORKERS

Non-Penn workers who will be assigned as a Manager, or have another security role in Workday, will need to be hired as a Contingent Worker in Workday. A Contingent Worker is someone who has a position in Workday, but does not receive pay or benefits.

The most common scenario will be an external individual who manages a University employee. Examples may include:

- PSOM employees who are managed by a UPHS employee
- Penn employees who are managed by an external vendor

To facilitate the ease of migration to Workday in these cases, it is recommended that anyone who needs a security role (including manager) be hired as a Courtesy Appointment in PennWorks. This will prevent the need to hire them in Workday at Go-live.

Detailed instructions for adding a Courtesy Appointment in PennWorks can be found here:

<https://www.workday.upenn.edu/home/toolbox/key-business-changes>
(PennKey required)

New System for Payroll Reallocations

On July 1 the UMIS Salary Management Reallocations system is being retired and payroll reallocation functionality will be removed from PennERS. Payroll Reallocations is a new web-based system that will be used for all payroll reallocations moving forward. The new Payroll Reallocation application will be available 24/7 and provides a better user experience through a feature rich web-based tool. Employing a friendly search & filter tool, users will be able to easily search and find the target payroll expense transaction that needs to be reallocated. Dashboards will display any Suspense activity that needs to be reallocated. Payroll reallocations will now be processed nightly, except on weekend nights, providing greater control over account management.

The last UMIS Salary Management Payroll Reallocations will be processed on July 1 and the new Payroll Reallocation application will be available starting July 8. Training for the new Payroll Reallocation application will be a two-module course, entirely web-based and available in Knowledge Link starting the week of June 10. School/Centers are reviewing individuals who currently have access to UMIS Salary Management Payroll Reallocations and PennERS roles (Pre-Reviewer, DC, and Sub-DC) and confirming who will be assigned training in Knowledge Link. Training will need to be completed by Friday, July 5 to ensure access on July 8.

All FY19 payroll expense data will be imported and viewable in the new Payroll Reallocation system. In preparation for this transition, users are encouraged to **clear all of Payroll Suspense (OJBC 9501)** and other reallocation activity before the end of the fiscal year. **Please note: As of July 1, any payments in UMIS Salary Management Payroll Reallocations marked as “P” for “Pending” will be dropped. The payment will show as never reallocated.**



PAYROLL AND PAYROLL TAX FACT SHEET FOR JULY 1, 2019

1 Direct Deposit (Pay Elections)

- You can now direct your pay to up to three (3) different bank accounts.
- Pay Election (Direct Deposit) account information is no longer validated by the bank prior to payment, eliminating delays in availability of direct deposit.
- **IMPORTANT!!** You should review your banking information carefully before submitting. An error in banking information could result in a delay in receiving your pay.

2 Credit Union Account

- Credit Union accounts will show as a Pay Election (Direct Deposit) account to which payments are directed.
- Credit Union accounts will count as one (1) of the three (3) bank accounts allowed for direct deposit.

3 Pay Advices (Pay Slip)

- Pay Slips (Pay Advices) will no longer be printed, but will be available to view and print in Workday.

4 W-4 and Other Tax Forms

- Federal and State W-4 forms as well as Local Residency Forms can be completed securely on-line at any time day or night.

5 W-2 Forms

- W-2 Forms beginning with the 2019 Tax Year will be available in Workday.
- Tax Years 2018 and 2017 will be available via the “My Tax Info” link on the U@Penn Portal.
- **W-2 Forms for years prior to 2017 can be obtained by contacting the Payroll Office.**
- You are encouraged to select electronic delivery of your W-2.

6 State Withholding Tax

- Individuals who are subject to state withholding in both their states of work and of residence will have tax withheld for both states.
- This does not apply to states with reciprocal agreements with Pennsylvania (e.g., New Jersey).

7 Federal Withholding - Supplemental Wages

- Supplemental wages such as bonuses, allowances, or vacation pay-outs at separation will be subject to federal tax withholding using the appropriate federal tax table based on your W-4 tax elections.

8 Address Changes

- You are responsible for promptly updating any changes to your home address to ensure proper taxation. You should also verify that your supervisor has made any necessary changes to your work address.



WORKDAY IMPLEMENTATION: 2019 CUTOVER INSTRUCTIONS (1 OF 4)

Cutover planning to support the Workday@Penn Go-live is well underway. The information included in these detailed cutover instructions provides highly impacted business owners with an overview of deadlines and additional information needed to successfully prepare their areas. Review the information carefully. Changes to deadlines and cutover procedures may be necessary to support the successful implementation of Workday. Please contact the Penn Employee Solution Center at HCMSolutionCenter@upenn.edu or (215) 898-7372 with any questions.

Staff Requisitions and Job Postings (HR Manager and Staff PeopleAdmin)

Mon	June 3 at 5 p.m.	Last Day to Create a PIQ/Requisition	
Mon	June 10 at 5 p.m.	Last Day for PIQ/Requisition to be approved by Schools/ Centers	Any PIQ/Requisition that is not approved in HR Manager will need to be re-entered into Workday on July 1, 2019 (if still needed).
Fri	June 14 at 5 p.m.	Last Day for Staff Job Posting	

Faculty (PeopleAdmin)

Tues	April 30 at 5 p.m.	Ability to create postings in PeopleAdmin will be removed for all users	If you have questions or comments - or would like to be added to the Faculty Affairs Companion Project listserv to receive email updates - contact the Faculty Affairs Project Team at: FA-Project-Help@pobox.upenn.edu .
Mon	June 10 at 5 p.m.	Last day for new applications for any open posting in PeopleAdmin for Faculty	
Sat	Aug 31 at 5 p.m.	Deadline for completing review and hire processes in PeopleAdmin for any searches that remain active after May 31.	

Hire (PennWorks)

Wed	June 12 at 5 p.m.	Last Day to Start New Hires in PennWorks	Starting a New Hire in PennWorks by this date provides you with two business days to submit all required paperwork to Onboard@Penn.
Fri	June 14 at 5 p.m.	Last Day to Submit New Hire Paperwork	Paperwork must be received by Onboard@Penn by this date to ensure that there is enough time to process and flip the minimum record.
Tue	June 18 at 5 p.m.	Minimum Record Complete	If a minimum record is not complete by this date, the record will not be converted to Workday.



WORKDAY IMPLEMENTATION: 2019 CUTOVER INSTRUCTIONS *(2 OF 4)*

Termination (PennWorks)

Tue	June 18 at 5 p.m.	Last Day to Complete a Termination	All exempt terminations effective June 30 need to be completed by this date. For all regular, non-exempt terminations that need to occur between June 19 and June 30, please contact the Penn Employee Solution Center at (215) 898-7372 or HCMSolutionCenter@upenn.edu for additional assistance. If the termination for a monthly worker needs to occur after June 18, 2019 at 5pm, complete the action in Workday after July 1, 2019.
-----	-------------------	------------------------------------	---

Additional Pay (PennWorks)

Mon	June 17 at 5 p.m.	Last Day to Submit Additional Pay Monthly Request	
Tue	June 18 at 5 p.m.	Last Day to Approve Additional Pay Monthly Request	Any additional pays that are NOT approved by June 18, 2019 at 5pm will need to be re-entered in Workday as a One-Time Payment. Additional Pay transactions that are in flight in PennWorks will not be converted to Workday.
Fri	June 28 at 5 p.m.	Last Day to Submit Additional Pay Weekly Request	
Mon	July 1 at 3 p.m.	Last Day to Approve Additional Pay Weekly Request	Any additional pays that are NOT approved in by July 1, 2019 will need to be re-entered in Workday as a One-Time Payment. Additional Pay transactions that are in flight in PennWorks will not be converted to Workday.

Preparing PennWorks for Workday

Fri	June 7 at 11:59 p.m.	Rapid Role Entry/Salary Increase Closes (except Unions 115, 54, and 590)	Please look for upcoming special instructions for conversion for Rapid Role Entry/Salary Increase on the workday.upenn.edu website.
Mon	June 17 at 11:59 p.m.	Rapid Role Entry/Salary Increase Closes for Unions 115, 54, and 590	
Tue	June 18 at 5 p.m.	Term Change and Annual Salary Non-Penn Employees (Courtesy Appointments) Summer Undergraduate Research Fellows	



WORKDAY IMPLEMENTATION: 2019 CUTOVER INSTRUCTIONS (3 OF 4)

Other PennWorks Actions

Tue	June 18 at 5 p.m.	Last date to make other updates in PennWorks (i.e. compensation changes, role updates, distribution lines, etc.)	On June 19, 2019 Schools/Centers access to PennWorks will become Read Only .
-----	-------------------	--	---

U@Penn

Wed	June 12 at 5 p.m.	Last day to make changes to direct deposit (pay elections) information	If you have an unexpected occurrence between June 13 and June 30 and you are required to make a change, please contact the Penn Employee Solution Center at (215) 898-7372 or HCMSolutionCenter@upenn.edu .
Tue	June 18 at 5 p.m.	Last date to make other updates in U@Penn (i.e. My Profile, PennPeople, etc.)	

Time Reporting (including eTimesheets and UMIS)

Sun	June 30 at 9 p.m.	Last Day to Submit Timesheets in eTimesheets System	Timing of submission and approvals follows usual and customary submission and approval schedule. Information included. These dates and times also reflect the deadline to enter and approve updates to a previous week's timesheets.
Mon	July 1 at 10 a.m.	Last Day to Approve Timesheets in eTimesheets System for Managers	
Mon	July 1 at 1 p.m.	Last Day to Approve Timesheets in eTimesheets System for Org Administrators	
Mon	July 1 at 3 p.m.	Online Time Reporting (OTR) Freeze	

Academic Appointments (Faculty Information System (FIS))

Fri	May 17 at 5 p.m.	Last PSC/S Meetings for Academic Year (Last School actions for Academic Year)	If you have questions or comments - or would like to be added to the Faculty Affairs Companion Project listserv to receive email updates - contact the Faculty Affairs Project Team at: FA-Project-Help@pobox.upenn.edu .
Thu	May 30 at 5 p.m.	Last PSC Meetings for Academic Year (Last School actions for Academic Year)	
Fri	May 31 at 5 p.m.	Last date for updates to FIS, including approvals for final PSC and PSCS meetings, EOC report approval, and approval of extramural consultants	



WORKDAY IMPLEMENTATION: 2019 CUTOVER INSTRUCTIONS (4 OF 4)

Reallocations

Mon	July 1 at 3 p.m.	Current Reallocations System will close at the same time that OTR and UMIS Closes	Any UMIS Salary Management Reallocation left as pending as of this date will be dropped and the payment will show as never reallocated.
Mon	July 8 at 9 a.m.	New Payroll Reallocations System Opens	

Declare Benefit Life Event

Fri	June 21 at 5 p.m.	Last day to make an online change through ADP to 2018-2019 accounts due to a qualifying life event	If you have a change that affects your 2018-2019 health, life, and flexible spending accounts/health savings accounts benefits between June 22 and June 30, contact the Penn Benefits Center (1-888-736-6236).
-----	-------------------	--	--

Enter/Update PTO Requests

Fri	June 28 at 12 p.m.	Last day for exempt staff using PSOM time off system to request and record time off	Please note that the requests and approvals for time off in legacy systems occurring July 1 and after July 1 will not convert to Workday. After July 1, 2019, initiate a time off request in Workday to track future PTO. For additional information, visit workday.upenn.edu .
Sun	June 30 at 12 p.m.	Last day for exempt staff using Penn time off system to request and record time off	

Access to I-9

Fri	June 14 at 5 p.m.	Last day for current Equifax users to complete I-9s for new hires.	New hires will process through Onboard@Penn. Visit www.onboard.upenn.edu .
-----	-------------------	--	---

Retirement Plans

Wed	June 12 at 12 a.m.	Retirement Plans Blackout Period	No retirement plan salary contribution changes can be made June 13, 2019 through July 8, 2019.
Mon	July 8 at 12 a.m.	Retirement Plans Blackout Ends	Retirement plan salary contribution changes can resume.

The Workday@Penn leadership and team thank you for your involvement in this transformative project for the University. Together, we're building the future of work at Penn.