



The Bottom Line



TAX REFORM IMPACT TO EMPLOYEES



The Tax Cuts and Jobs Act of 2017, which was signed into law by President Trump on December 22, 2017, sets forth a number of changes impacting individuals. If you have any personal tax questions, we strongly suggest that you contact your professional tax advisor. Listed below, we have outlined some of these changes that may impact our employees' Federal withholding taxes. Please note that these provisions require further clarification from the Internal Revenue Service. We expect clarifications and guidance to be published in the upcoming months. In the meantime, the University will need to identify provisions where clarity is needed, acting prudently in the absence of IRS guidance.

INDIVIDUAL TAX WITHHOLDING

Summary of Changes

Under the old law there existed seven individual income tax brackets ranging from 10% to 39.6%, depending on income. Under the new law, the seven tax brackets remain, however, individual income tax rates are lowered and range from 10% to 37% with new income thresholds for each bracket. Additionally, the tax rate on supplemental payments, such as bonuses and allowances, has been reduced to 22% from 25%. The tax rate on supplemental payments over \$1 million has been reduced to 37% from 39.6%.

For more information on the new Federal tax tables, see IRS Notice 1036 <https://www.irs.gov/pub/irs-pdf/n1036.pdf>.

How Does This Impact You?

The IRS has issued new tax tables based on the changes enacted. Federal withholding taxes based on these new tables are effective within the January/February time frame. The University is working with our tax software provider, BSI, to implement these changes. BSI is actively processing the Federal withholding updates released by the IRS to implement the 2018 withholding tables as soon as possible, but not later than February 15, 2018. Looking ahead, BSI's plan is:

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W-4 Revision 2018

Following the enactment of the Tax Cuts and Jobs Act in December 2017, the IRS is in the process of revising the Form W-4 to more fully reflect the new law and providing taxpayers information to determine whether they need to adjust their withholding. The IRS is also revising the withholding [tax calculator](#) on IRS.gov to help employees who wish to update their withholding in response to the new law or other changes in their personal circumstances in 2018. The 2018 W-4 is expected to be released at the end of February 2018. Until then, the 2017 W-4 form can be used to make any changes in withholding.

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Additional Newsletters

Office of Research Services

<http://www.upenn.edu/researchservices/newsletter.html>

Prior Issues of *The Bottom Line*

<http://www.finance.upenn.edu/ftd/bline.shtml>

Office of the Comptroller

TAX REFORM IMPACT TO EMPLOYEES

Continued from the previous page

- Federal
 - BSI has deployed Federal wage and pension withholding changes in January. Employees will see the change in their January 31 monthly pay or February 2 weekly pay, before the IRS-mandated deadline of February 15.
- States
 - BSI will continue to monitor the states and issue changes (if any) that are published as a result of the Federal updates

PENN'S BIKE COMMUTER EXPENSE REIMBURSEMENT PROGRAM

Summary of Changes

Effective January 1, 2018, tax regulations for the Bike Commuter Expense Reimbursement Program have changed. Under the old law, qualified bicycle commuting reimbursements of up to \$20 per month were excludable from an employee's gross income (i.e., treated as tax-exempt). Under the new law, this provision has been repealed and such reimbursements are considered taxable income beginning with all payments made in calendar year 2018.

How Does This Impact You?

Eligible faculty and staff who have received or will be receiving bicycle commuting reimbursements based on 2017 Tax Year eligible expenses will now be subject to wage-withholding taxes on those reimbursements made in the first quarter of 2018. The reimbursements will continue to be made via CONCUR through March month-end; however, the imputed income will be assessed to each individual during the last payroll cycle in March.

MOVING EXPENSES BENEFIT

Summary of Changes

Under the old law, reimbursements made by the employer for qualified moving expenses were not

subject to Federal withholding tax. Reimbursements for non-qualified moving expenses were subject to Federal withholding taxes under the prior law. Under the new law, all reimbursements provided by the employer for moving expenses are subject to Federal income, FICA, and Medicare taxes.

This change is effective for reimbursements for moving expenses (including moving of household goods and personal effects, temporary storage, and travel costs going from the old residence to the new) made to employees or paid directly to third parties on and after January 1, 2018 and through December 31, 2025.

How Does This Impact You?

Individuals receiving reimbursement for qualified moving expenses paid to them or paid directly to third parties (e.g., SIRVA) will be subject to Federal, FICA, and Medicare tax withholding beginning in January, 2018. Reimbursements for non-qualified moving expenses will continue to be subject to Federal, FICA, and Medicare withholding as under the prior law.

ACHIEVEMENT AWARDS

Summary of Changes

Under the old law, the value of any intangible personal property (cash, cash equivalents, gift cards, gift coupons or gift certifications, vacations, meals, lodging, or tickets to the theater or sporting events) given to an employee as an award for either *length of service* or *safety achievement* was excludable from income within dollar limitations. Under the new law, this exclusion no longer exists for tax years beginning after December 31, 2017.

How Does This Impact You?

Effective January 1, 2018 employee achievement awards in all categories that are considered cash and cash equivalents as outlined above are includable as additional compensation to employees.

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W-4 Revision 2018 *Continued from Page 1*

WHAT DOES THIS MEAN TO YOU?

The IRS, in its [Frequently Asked Questions](#), has indicated that the 2018 income tax withholding tables are designed to minimize taxpayer burden as much as possible and will work with employees' current Forms W-4. If you need to make a change to your withholding, you can use the 2017 Form W-4 for submitting withholding adjustments for 2018 until 30 days after the 2018 Form W-4 is available. Once the 2018 Form W-4 is issued, you may use that form to make any changes to your withholding.

The IRS encourages individuals to check their withholding when the new information becomes available in February and will help educate taxpayers about the new withholding guidelines and the tax calculator. This effort will be designed to help workers ensure that they are not having too much or too little tax taken out of their pay. Please note that the IRS recommends that you not include yourself as an exemption when completing your W-4.

EMPLOYEES WHO CLAIMED EXEMPTION FROM WITHHOLDING IN 2017

Under Treasury regulations, Forms W-4 furnished to the employer claiming exemption from withholding for a taxable year are effective up to and including February 15 of the following year. If an employee claiming exemption from withholding has not submitted

a new Form W-4 for the current tax year by February 16, the employer is required to begin withholding based on the last Form W-4 where the employee did not claim an exemption from withholding, or, if one wasn't furnished, to withhold at single with zero withholding allowances.

In consideration of the IRS delay in publishing the 2018 Form W-4 the following procedures apply for employees who claimed exemption from withholding in 2017:

- Employees have an extended deadline of February 28, 2018, to submit a new Form W-4 for 2018;
- Employers may continue to use a 2017 Form W-4 claiming exemption from withholding through February 28, 2018;
- Up to 30 days after the 2018 Form W-4 is released, the 2017 Form W-4 may be temporarily used for claiming exemption from withholding in 2018 by (1) striking "2017" on line 7 of the Form W-4 and entering "Exempt 2018" in its place, (2) signing the form; and (3) entering the date in 2018 that the form was signed.

If you have any questions, please contact the Penn Employee Solution Center at:

hcmsolutioncenter@upenn.edu

International Student and Scholar Services (ISSS) is pleased to offer the following workshops in Spring 2018:



In Person Workshops for Department Administrators

H-1B Visa Workshop	March 5 th 12:00 p.m. – 1:30 p.m.	Go Here to Register
J-1 Exchange Visitors Workshop	March 9 th 12:00 p.m. – 1:30 p.m.	Go Here to Register

Office of the Comptroller

PA Withholding on Non-Employee Compensation

Under PA Act 43, effective January 1, 2018, the University of Pennsylvania is required to withhold Pennsylvania state income taxes on certain payments to individuals as defined under the law, who are non-residents of Pennsylvania and performing services within the Commonwealth of Pennsylvania. This law applies to individuals and LLCs electing to be taxed as individuals.

The law was signed at the end of October 2017 and guidance on implementing the new tax law was issued by the Commonwealth in mid-December.

In order to be compliant with the new law, the University began withholding Pennsylvania taxes at the rate of 3.07% for all affected individuals with addresses outside of Pennsylvania with payments made in January. We identified approximately 1,200 vendors that are potentially impacted by this change and sent out a communication notifying them of the change on January 29, 2018. The memo requests that each vendor self-identify as to the location where their work was performed.

- The vendor responses indicating their work was performed outside of Pennsylvania will be forwarded to Accounts Payable. Once received, Accounts Payable will be contacting the appropriate department administrator within the University to concur with the vendor's

identification of where location of services have been or will be provided. Once confirmed, the supplier's record will be set to not withhold.

- The vendor responses indicating their work was performed inside Pennsylvania will be forwarded to Accounts Payable for their record to be set to withhold.
- Vendors not responding by February 28th will have their record set to withhold until a response is received from the vendor indicating that the work is provided outside of Pennsylvania and department concurrence is received.

Through January 31, 2018, approximately 115 individuals have had Pennsylvania tax withheld from their vendor payment. The University will provide a refund of taxes withheld during the months of January and February, where appropriate, for those individuals returning their self-identification form by the February 28 deadline. After that date, vendors will need to wait until the following year to request a refund from the Commonwealth for the withheld tax where they have little or no Pennsylvania tax liability.

We are also working with Purchasing Services to develop a method within the supplier portal on-boarding workflow to identify where services are provided.

If you have any questions, please contact Accounts Payable at dofapsupp@pobox.upenn.edu.



Models of Excellence Program

Congratulations to this year's [honorees](#)!

This year, Penn's Models of Excellence Program is honoring 97 exceptional staff members who play key roles in Penn successes every day.

Please save the date for this year's Models of Excellence ceremony and reception on April 4, 2018 at 4 p.m. in Irvine Auditorium. Click [here](#) to RSVP by March 30, 2018.

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PHILADELPHIA RESIDENTS – EARNED INCOME TAX CREDIT

From the City of Philadelphia

What is EITC?

EITC is a Federal Tax refund available to working individuals and families. The average credit amount in Philadelphia is over \$2,500, so hurry and find out if you're eligible.

The deadline to file is April 17, 2018!

How do I know if I'm eligible?

- You (and your spouse, if filing a joint return) have a valid Social Security number (SSN).
- Your 2017 earned income is within the limits below.
- You are 25 to 65 years of age OR
- You have a qualifying child.

Here's all you need to do:

1. File your federal tax return
2. Complete the EITC form

The deadline is April 17—don't wait!

Text "FILE" to 99000 or visit

www.YouEarnedItPhilly.com to find locations of FREE tax preparers near you.

It's Free

We know you want your tax refund ASAP. But to avoid paying service fees of up to 40 percent of your refund, skip the for-profit tax prep services and file with the City of Philadelphia's free, IRS-certified tax preparers. That way, you'll get back the full amount of your refund.

Your benefits are safe.

EITC does not count as income. So no matter how much you get back, you'll still be eligible for any government assistance programs you're enrolled in.

There's still time.

If this is your first time filing for EITC, you should know that your income for 2014, 2015, and 2016 is also eligible. So you could get back even more than this year's maximum of \$6318. File for 2014, 2015, and 2016 to get up to **four times** the maximum return. There is no reason not to file. It's your money. So go get it! It's easy and free.

2017 Income Eligibility Based on Filing Status

# Qualifying Children	Single	Married (Filing Jointly)	Maximum Benefit
None	\$15,010	\$20,600	\$510
1	\$39,617	\$44,207	\$3,400
2	\$45,007	\$50,597	\$5,616
3 or more	\$48,340	\$53,930	\$6,318

Tax and International Operations

Important! Post-Doc Payroll Changes – 01/01/2018

Following the revocation of an IRS Private Letter Ruling, effective January 1, 2018, non-NRSA postdoctoral fellows and researchers will be subject to withholding taxes for federal, FICA and Medicare taxes. Non-NRSA postdoctoral salaries will also be subject to the part-time EB rate.

Outlined below are the changes to payroll processing that are being made to ensure compliance with the IRS ruling. This information is also summarized in the reference table on page 7. These changes are effective beginning January 1, 2018.

217500 POSTDOCTORAL RESEARCHER

- Individuals in this job class will be charged to object code **5062 Postdoctoral Researcher** beginning January 1, 2018, instead of object code 5042, where they are charged today. There will be a one-time process run to update the object code in the distribution lines within the HR/Payroll system. Additionally, costs charged to object code 5062 will be subject to part-time EBs, which benefit costs will be recorded in object code 5191 Limited Service (Part Time) Employee Benefits.
- Individuals in this job class currently charged to object code 1524 Due to/Due from: Salaries – no EBs charged will be charged to object code **1523 Due to/Due from: Salaries (Part time EB rate)** beginning January 1, 2018. There will be a one-time process run to update the object code in the distribution lines within the HR/Payroll system. Additionally, costs charged to object code 1523 will be subject to part-time EBs, which benefit costs will be recorded in object code 1540 Due to/Due from: Part Time Employee Benefits Charge.

217603 POSTDOCTORAL FELLOW (NON-NRSA)

- Individuals in this job class will be charged to object code **5063 Non-NRSA Postdoctoral Fellow** beginning January 1, 2018, instead of object code 5043, where they are charged today. The Earns

Type on the distribution line will also be changed to PD4 from PD3. There will be a one-time process run to update the object code in the distribution lines as well as to update the Earns Type in the HR/Payroll system. Additionally, costs charge to object code 5063 will be subject to part-time EBs, which benefit costs will be recorded in object code 5191 Limited Service (Part Time) Employee Benefits.

- Individuals in this job class currently charged to object code 1524 Due to/Due from: Salaries – no EBs charged will be charged to object code **1523 Due to/Due from: Salaries (Part time EB rate)** beginning January 1, 2018. There will be a one-time process run to update the object code in the distribution lines within the HR/Payroll system. Additionally, costs charged to object code 1523 will be subject to part-time EBs, which benefit costs will be recorded in object code 1540 Due to/Due from: Part Time Employee Benefits Charge.

217703 NRSA FELLOW

- No changes will be made to this job class.

217503 H1-B Post-Doc

- **Schools and Centers will need to manually reassign these individuals to Job Class 217500 Postdoctoral Researcher by January 1, 2018.** Object code and Earns Type on the distribution line will also need to be updated. A separate communication will be sent to the Senior Business Administrators with instructions on making the change along with the list of active H1-B Postdocs. There are less than 60 individuals in this job class currently. This job class will be “frozen” so that no one new can be added. Object code 5047 Postdoctoral H1-B will also be deactivated.

If you have any questions, please contact the Tax and International Operations Office at (215) 898-6291 or submit a HelpDesk inquiry at:


<https://www.finance.upenn.edu:44301/apps/TaxHelpDesk/>

Continued on the next page

Tax and International Operations

Important! Post-Doc Payroll Changes – 01/01/2018

Continued from the previous page

Current				New			
Job Class	Object Code	Earns Type	EBs	Job Class	Object Code	Earns Type	EBs
217500 Postdoc Researcher	5042 Post-Doctoral Researcher - can be used with any funding source except a training grant -- OR -- 1524 Due to/Due from: Salaries – no EBs charged	PD4	No	217500 Postdoc Researcher	5062 Postdoctoral Researcher - can be used with any funding source except a training grant or fellowships -- OR -- 1523 Due to/Due from: Salaries (Part time EB rate)	PD4	Part time - add oc 5062 to EB Mass Allocation (1)
217603 Postdoc Fellow (non-NRSA)	5043 Post-Doctoral Fellow - can be used with any funding source except a research grant -- OR -- 1524 Due to/Due from: Salaries – no EBs charged	PD3	No	217603 Postdoc Fellow (non-NRSA)	5063 NonNRSA Postdoctoral Fellow - can only be used for non-federal fellowships -- OR -- 1523 Due to/Due from: Salaries (Part time EB rate)	PD4	Part time - add oc 5063 to EB Mass Allocation (1)
217703 NRSA Fellow	5043 Post-Doctoral Fellow - can be used with any funding source except a research grant	PD3	No	217703 NRSA Fellow	5043 Post-Doctoral Fellow - can ONLY be used with a NRSA grant (i.e. T/F grants)	PD3	No
217503 H1-B Postdoc	5047 Post-Doctoral H1-B - can be used with any funding source	RMO	Part time	Reassign to 217500; Job Class 217503 will be "frozen" so that it cannot be used going forward	5047 will no longer be used.		
				(1) Benefits will be charged to object code 5191 Limited Service (Part Time) Employee Benefits –OR– 1540 Due to/Due from: Part Time Employee Benefits Charge			

INDIVIDUAL SERVICE PROVIDERS: CLASSIFICATION AND PAYMENT TRAINING

Classes full – more will be added!

The following **Individual Service Provider** training has been added to [Knowledge Link](#):

- Monday, March 26, 2018 10:00 a.m. – 12:00 p.m.
- Monday, April 16, 2018 10:00 a.m. – 12:00 p.m.
- Tuesday, April 24, 2018 10:00 a.m. – 12:00 p.m.

Who Should Register: Individual Service Providers: Classification & Payment training is intended for anyone who is involved with any of the following:

- Hiring employees or temporary workers
- Processing honoraria payments
- Procuring the services of and paying independent contractors or other individual service providers
- Creating or approving BEN Buys requisitions or purchase orders for independent contractors

Pre-requisites: Attendees should review the following materials found on the [Service Provider Classification](#) website in advance of the session and are encouraged to bring copies with them to the session.

- [Independent Service Providers: Classification and Payments](#) presentation
- [Service Provider Questionnaire \(Service Provider Completes\)](#)
- [Service Provider Evaluation \(School/Center HR Director Completes\)](#)
- [Procedural Guide for Independent Contractors and Limited Engagements](#)
- [Limited Engagement Agreement: US Citizen](#)
- [Limited Engagement Agreement: Non-Resident Alien](#)

General Objectives: On completion of this module, the participant should be able to:

- Understand the key federal laws and regulations governing and Penn policies for classifying, paying, and taxing employees and individual service providers
- Utilize the worker classification questionnaires to properly classify individual service providers
- Properly process and submit payment requests for the various individual service provider classifications (employees, temporary workers, independent contractors or other individual providers) and honoraria
- Locate resources for assistance

HCM TEAMS REQUESTS PENNWORKS DATA CLEAN-UP



With the HCM Technical and Functional teams moving from the Architect phase to Configure and Prototype phase, improving the current data quality of our soon-to-be legacy systems is a key to easing the transition to Workday@Penn. The HCM teams are requesting help with the data clean-up of PennWorks in particular. They are, or soon will be, in touch with those with expertise in various areas to help advance this activity. The HCM project greatly appreciates the partnership.

Stay current with the HCM project by visiting our website regularly or subscribing to the monthly HCM Update newsletter:

<https://www.hr.upenn.edu/hcm>

TO ALL USERS OF BUSINESS OBJECTS GRANT REPORTS:

As of 2/6/2018, the GRANT REPORTS in the BusinessObjects Multiple Data Sources folder are modified to reflect object codes 5062 and 5063. Any shortcuts to these reports will inherit this change. The affected reports are:

- GRANT REPORTS
- GRANT REPORTS – CREF
- GRANT REPORTS – PI
- GRANT REPORTS – PI Awarded
- GRANT REPORTS – Resp Org

If you have your own versions of these reports, you will need to copy over the updated versions from the Multiple Data Sources folder or you can modify the affected variables:

- Exp MTD Student Salary
- Student Salaries
- Student Salary Budget
- Student Salary Encumbrance

By doing the following:

Replace the existing IF statement criteria:

= If([Query 1 with FINQUERY].[Coa Object (BAL)]
Between ("5040";"5049"))

With this:

= If([Query 1 with FINQUERY].[Coa Object (BAL)]
Between ("5040";"5049") Or [Query 1 with
FINQUERY].[Coa Object (BAL)] InList ("5062";"5063"))

If you have any questions, please don't hesitate to contact us at da-staff@isc.upenn.edu.

PAYMENTNET UPDATE

Beginning March 31, J.P. Morgan will issue email notifications to Penn Purchasing Card users whenever the home address and/or cardholder's address for an account is changed in PaymentNet. The cardholder will receive a notice for each account that was updated. For instance, if a person has three accounts and changes the home address for each card account, three notifications will be sent to the

email address on file for that cardholder. The notice will reference the last four digits of the card account number impacted by the address change. These notifications are being provided as part of J.P. Morgan's ongoing commitment to safeguard clients' data.

If you have any questions, please contact pcardsup@exchange.upenn.edu.

PURCHASING SERVICES RESEARCH SUPPLIER SHOW 2018

AT SMILOW COMMONS, SMILOW CENTER FOR TRANSLATIONAL
RESEARCH (SCTR) | 3600 CIVIC CENTER BLVD



**WEDNESDAY
MARCH 28, 2018
10AM - 2PM**

- Over 30 suppliers
- Door prizes
- Supplier samples
- Lunch



For more details and advance registration, go to www.upenn.edu/purchasing/show18

For additional information go to www.upenn.edu/purchasing/diversityforum_expo

Save the Date

WEDNESDAY, MAY 23, 2018



Penn Supplier Diversity Forum & Expo

CELEBRATING AND SHOWCASING

**DIVERSITY
AND
INCLUSION**



PennTEM
Travel & Expense Management

PENN TRAVEL CARD UPDATED 'NEED TO KNOW' GUIDE NOW AVAILABLE

The updated Penn Travel Card "Need to Know" Guide is now available. It's a useful resource for those individuals who are new users of the Penn Travel Card. The guide also functions as a great refresher for existing cardholders.

Topics covered include:

- Activating your new card;
- Selecting/Obtaining a PIN number – required for use at many vendors, especially internationally;
- Setting up online access to your credit card account – for viewing of statements or making payments, if necessary;
- Appropriate use of the Penn Travel Card – University-related Business Travel and Entertainment expenses only; and,
- Expense Reports and Payment Activity.

To access this guide, log onto www.upenn.edu/penntravel. Select Penn Travel Card on the top of the page and then choose "Need to Know" on the left-hand side.

Training Opportunity: Business Objects Introduction and Advanced Classes

We have two BusinessObjects / WEBI classes coming up in April (Introduction and Advanced). These are for anyone who needs to query the data warehouse so you may want to share this information with your business office.

Seats are limited. To purchase a seat, please email your name, PennID#, budget code, and business administrator's email to:

learnit@isc.upenn.edu

The deadline to register June 18, 2018.

Please address any questions to:

learnit@isc.upenn.edu

JULY 16 (MONDAY) | 9:30 A.M. - 4:30 P.M. BUSINESSOBJECTS CLASS INTRODUCTION

This hands-on instructor-led course will give students the skills to create comprehensive BusinessObjects Web Intelligence reports. Students will learn how to analyze information, distribute information, and use the major reporting features of Web Intelligence.

Who Should Attend: This course is designed for business users who need to generate effective reports using BusinessObjects Web Intelligence.

Prerequisites: No prior reporting experience is required. Familiarity with Microsoft Office is helpful.

Fee: \$450

Course Topics: After completing the course, student will be able to:

- Understand BusinessObjects terminology and features
- Understand the BI Launchpad portal
- Build complete BusinessObjects reports
- Restrict data using conditions and filters
- Use various presentation styles

Location: ISC Training Lab 220 @ [Sansom Place West](#)

JULY 17 (TUESDAY) | 9:30 A.M. - 4:30 P.M. BUSINESSOBJECTS CLASS ADVANCED

This hands-on instructor-led course will give students the skills to create advanced BusinessObjects Web Intelligence reports. Students will learn how to analyze information, distribute information, and use the advanced reporting features of Web Intelligence.

Who Should Attend: This course is designed for business users who need to generate effective reports using BusinessObjects Web Intelligence.

Prerequisites: Prior BusinessObjects Web Intelligence reporting experience or training is required. Familiarity with Microsoft Office is helpful.

Fee: \$450

Course Topics: After completing the course, student will be able to:

- Understand Business Objects terminology and features
- Analyze data
- Use advanced query techniques
- Use report functions
- Create report variables
- Use the If Then Else statement
- Use calculation contexts
- Report from multiple data sources

Location: ISC Training Lab 220 @ [Sansom Place West](#)

Quarterly Quote

"Individual commitment to a group effort — that is what makes a team work, a company work, a society work, a civilization work." — Vince Lombardi

11

‘Office Hours’ for Business Objects

Enterprise Information & Analytics (EI & A), formerly Data Administration, is offering the following “office hour” sessions for all Data Warehouse users through June 2018. These sessions are hands-on, held in Sansom West, Training Lab Room 220, and open to users of any of the various data warehouse data collections.

You can use the time to work through pre-defined Business Objects reporting exercises or work on your own specific reports (or customized version of a Public folder report).

EI&A staff with knowledge of all data collections will be available for questions.

Wednesday, March 21, 2018

10 a.m. – 12:00 p.m.

Monday, April 23, 2018

1:00 p.m. – 3:00 p.m.

Wednesday, May 16, 2018

1:00 p.m. – 3:00 p.m.

Thursday, June 14, 2018

10 a.m. – 12:00 p.m.

To attend, you must register using [KnowledgeLink](#), searching for “freestylin” and selecting the date/time of your choice. Registration is limited to 12 persons/session, on a first-come, first served basis and maybe cancelled due to lack of participation.

Please only register for one or two sessions, so that as many people as possible may have an opportunity to attend.



Launches New Website

We are pleased to announce the launch of our new website, home for information about the Data Warehouse and centrally-supported supported query tools (BusinessObjects and QlikView). Since we are moving web content platforms and our former site is being retired, please change any bookmarks to point to the new Enterprise Information & Analytics page at:

<https://www.isc.upenn.edu/enterprise-information-analytics>

Some highlights of the new site:

- Data Collections are listed on the main page, grouped by broad subject area. The link to each will take you to the page for the collection which has tabs for easy access to table and element documentation, diagrams, refresh schedule, etc.
- The right-hand menu provides easy access to most commonly-needed resources – query tool logins and info, access forms, load status page, and the password changer.

With the launch of this new site, attempts to access our old documentation pages (with /computing/da/dw, /computing/da/bo, etc.) will soon automatically redirect to the new pages. We do recommend that you remove bookmarks to the old Warehouse site, as well as any to particular data collection subsites or BusinessObjects document-tation, and create new bookmarks refer-encing the new site as you need them.

We hope you find the new site to be useful and straightforward to navigate. If you have any questions about it, or find any broken links, please let us in the Enterprise Information & Analytics team know by emailing:

da-staff@isc.upenn.edu

ISC continues to add services to the Apptio Bill of IT, the new automated monthly billing system introduced in March 2017. About 60 percent of ISC services are now included via Apptio, with most of the remaining services expected to be invoiced out of Apptio by the end of the fiscal year 2018.

WHY APPTIO?

- It replaces manual invoices that have been previously sent via email annually, quarterly and/or monthly with an easy-to-access online billing system.
- The Bill of IT consolidates multiple invoices for different services in one combined interface, and is available at the midpoint of each month.
- It is now simple to manage and view bills, drill down on invoice details, and export data to Microsoft Excel for further review and analysis.
- A robust and graphical dashboard provides clients with critical data and trends such as YTD invoiced amount for top five services, as well as YTD invoiced amounts for applications and projects (if applicable). See sample below:

REQUEST ACCESS TO APPTIO NOW

If you haven't yet registered for Apptio Bill of IT, click on [request access](#). After your account is created, you will receive a confirmation email with instructions.

LEARN MORE ABOUT BILL OF IT OFFICE HOURS

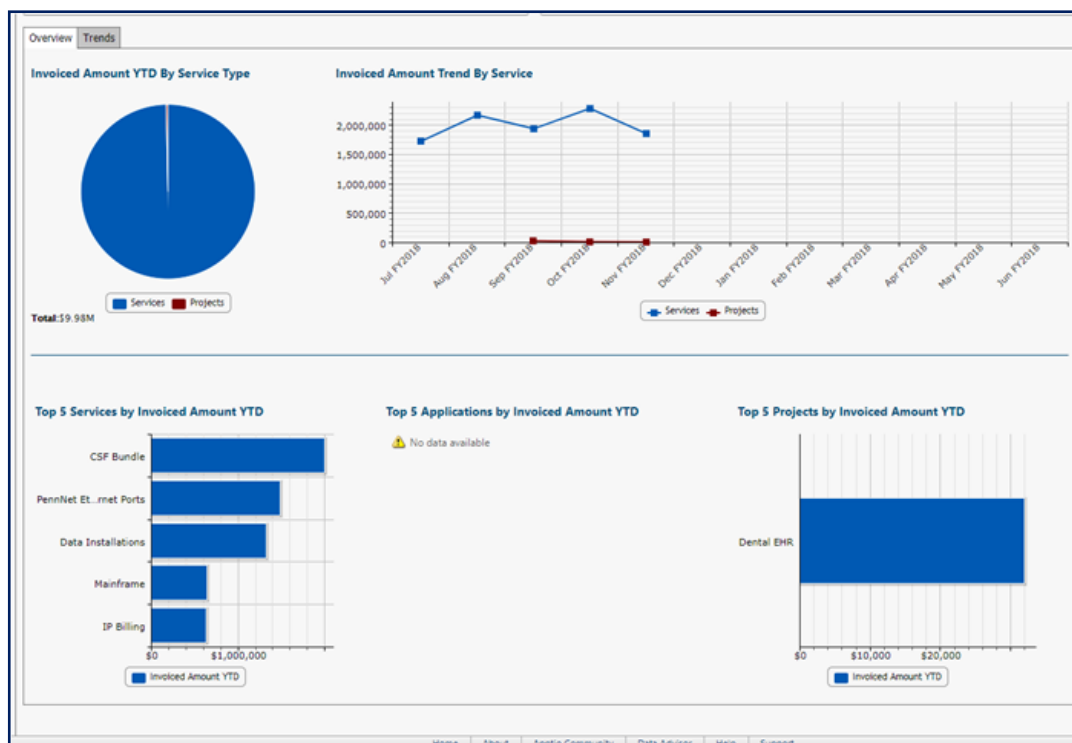
The ISC Finance team holds Apptio "Demystify Your Bill" walk-in office hours on several Thursdays from 1:00 p.m. – 2:00 p.m. in Van Pelt Library, Room G102. Clients with questions about their bills may bring a manual or Apptio invoice to discuss with a member of the ISC Finance team. Apptio Walk-in Office Hours: March 22, 2018.

LUNCH AND LEARN

Apptio Lunch and Learn sessions are held 12 p.m. – 1:00 p.m. at Conference Room 201A, 3401 Walnut Street, on a monthly basis. Lunch is provided. Registration is required. Click on link to RSVP via [Knowledge Link](#).

QUESTIONS

Contact help@isc.upenn.edu or 215.898.1000
For more information, visit the [ISC Finance website](#).



Effort Reporting Deadlines

Below are the remaining FY18 deadlines for effort reporting for planning purposes:

Effort Reporting Period	Description	Start Date	End Date	Last Date for Reallocations through Payroll	Date Forms are Available	Closing Date / Due Date
123117	Quarter 2 - Weekly	10/01/17	12/31/17	03/02/18*	02/05/2018	04/06/18
	Fall Semester – Monthly	07/01/17	12/31/17			
033118	Quarter 3 - Weekly	01/01/18	03/31/18	04/23/18	04/30/18	06/29/18
063018	Quarter 4 - Weekly	04/01/18	06/30/18	08/06/18	08/13/18	10/12/18
	Spring Semester – Monthly	01/01/18	06/30/18			

* Due to the emergency maintenance performed on ERS during the reporting period, UMIS was reopened for reallocations through 3/2/18.

These dates can also be found in the Effort Reporting section of the ORS website:

<http://www.upenn.edu/researchservices/effortreporting.html>

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 no later than **May 1, 2018**

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

1. What is the new object code for a Post Doc Researcher?
2. Name one person who is receiving a Models of Excellence Award this year.
3. What is the extended deadline date for employees to submit a W-4 for 2018?
4. What is the date of the Research Supplier Show?
5. What is the Tip: for Accessing BEN Financials for new End-Users?

**Last Quarter's Winner
Congratulations!!
Helen Poulos**

**Program Coordinator for Faculty Affairs and Fellowship
Division of Endocrinology, Diabetes, and Metabolism
Institute for Diabetes, Obesity, and Metabolism**



*March 11th
2:00 a.m.*

BEN Knows

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



Accessing BEN Financials – New End Users

New BEN Financials end-users must successfully complete BEN Financials training and submit a BEN Financials Access Request eForm within 60 days of completing training. If the 60 day requirement is not met, the eForm will be disapproved and routed back to the Requestor. The end-user will need to be retrained and submit a new eForm upon completion.

The BEN Financials Access Request eForm can be obtained at the following URL:

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

To access the form:

- Expand section under BEN Financials
- Select 'BEN Financials Access Request eForm'
- If you are not currently authenticated into a U@Penn secured site, you will be prompted to enter your PennKey and Password

IMPORTANT: Once the form has been processed by Financial Systems, an email will be sent to the individual who initiated the request. Be sure the "Initiator" is the end-user requesting access. The email will contain your BEN Financials username and detailed instructions on how to generate your password.

You can also get detailed instructions by [clicking here](#) for the "Self-Service BEN Financials Password Generation" documentation.

Tip: It is best *not* to submit your eForm in advance of training as the eForm will be rejected back to the Requestor until the training has been completed.

Did You Know...

...if you have **students who will be submitting expenses through Concur**, please consider sharing with them this newly created [Instructional Guide](#). The guide will walk them through the process of how to become and expense user in Concur, how to set up their direct deposit account, Tips and Tricks and much more.

... as part of our ongoing effort to help the Penn community better leverage its learning tools and resources, **ISC is making a set of templates available to individual Schools and Centers to encourage the use of [Lynda.com](#) for academic and professional development.** [Lynda.com](#) is an online video training service with thousands of courses taught by industry leaders and experts. Beginner to advanced courses are available in business, software, and technology.

Penn's [Lynda.com](#) subscription is available to Penn students, faculty, and staff with a valid PennKey and password. The templates are designed to be customized with each School or Center's branding and tailored to their audiences. **Please find the templates at the following link located on Penn+Box:**

<https://upenn.box.com/s/bphptme8lhxoibylcm33zzcgect63w5>.

If you have any questions about the templates please contact kl_help@lists.upenn.edu.