The Bottom Line

PENN MARKETPLACE INFORMATION SESSSION

Looking to upgrade your Penn Marketplace knowledge and have a chance to ask your questions? If so this is the course for you. The first- half will cover topics of interest. The second-half of the program will be dedicated to questions from the attendees.

WEDNESDAY MARCH 13 10:30 A.M. – 12:00 P.M.

Please register for the session at: PennMarketplace Information Session (PennKey authentication needed). Space is limited.

The session presentation can be found by clicking here:

NEW FOREIGN SUPPLIER QRG

Responding to Penn Marketplace feedback a working group was formed to better understand the challenges faced with processing foreign supplier/payee procurement and payments. As a result, a new "Doing Business with Foreign Suppliers/Payees" QRG (quick reference guide) has been posted to the Penn Marketplace website:

https://cms.business-services.upenn.edu/purchasing/making-purchases/marketplace-enhancements/training/reference-guides.html

Additional Newsletters

Office of Research Services
http://www.upenn.edu/researchservices/newsletter.html

Prior Issues of *The Bottom Line*
https://www.finance.upenn.edu/financial-training-department

Workday@Penn

Human Capital Management (HCM) News https://www.hr.upenn.edu/hcm
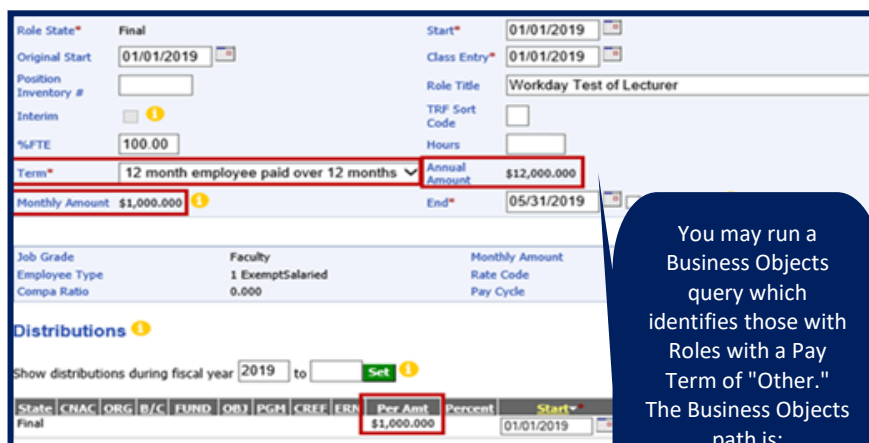
Term Changes in PennWorks

PennWorks' "Term" selections changed on February 19 in order to support Workday data conversion.

When entering salary data, PennWorks users had been able to select a Term of "Other."

As of February 19, any employee whose term is not updated and remains "Other" will be converted to a 12/12 term to support Workday data conversion.

Moving forward, as you update or enter new pay, pick a term and adjust annual salary to achieve the appropriate amount for that term. For example:

You may run a Business Objects query which identifies those with Roles with a Pay Term of "Other." The Business Objects path is: Payroll>Salary Management>HCM Legacy Data Review>HCM Legacy Cleanup - Roles with Pay Term of Other.

- 12 month worker paid over 12 months (12/12); Annual Salary = Monthly Amount x 12
- 10 month worker paid over 10 months (10/10); Annual Salary = Monthly Amount x 10
- 9 month worker paid over 9 months (9/9); Annual Salary = Monthly Amount x 9
- 9 month worker paid over 12 months (9/12); Annual Salary = Monthly Amount x 12

Workday@Penn Virtual Learning Conferences

Develop your understanding of core concepts, terminology, commonly used business processes and how to navigate in Workday by attending one or more of a series of webinars called Virtual Learning Conferences. They are neither required nor a substitute for formal end user training. Anyone in the Penn community may register and attend. We will record each of the webinars and place recordings on the Workday@Penn website. More information is available on the website.

The schedule, topics, and registration links are below:

- **3/7 – Staffing Events**
- **3/14 – Compensation & Payroll**
- **3/21 – Time Tracking**

Onboard@Penn

The University will launch a new service center called Onboard@Penn that will provide onboarding services for new hires. Located on the street level of 3401 Walnut Street, the office will be the first stop for

all new hires. As part of service delivery for the HCM Transformation Initiative, Onboard@Penn will streamline in-person onboarding activities, ensure compliance with federal regulations and policies, and increase worker engagement and productivity from day one.

Contact hcm-announcement@upenn.edu for more information.

Penn Employee Solution Center Celebrates One-year Anniversary

Penn Employee Solution Center Celebrates One-year Anniversary

Launched in late January 2018 and introduced gradually to schools and centers through the summer of 2018, the Penn Employee Solution Center has answered more than 5,000 calls, replied to more than 3,600 emails, and resolved close to 9,000 cases.

The Solution Center is available at 215-898-7372 or hcmsolutioncenter@upenn.edu.

Cutover Calendar for Workday@Penn

The Workday@Penn project has planned the calendar of Workday and legacy systems activities in June and July to facilitate go-live on July 1, 2019. See the calendar, payroll processing dates, and cutover activity key dates.

June – July 2019						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
June 16	June 17 **WEEKLY PAYROLL LEGACY**	June 18 **MONTHLY PAYROLL LEGACY**	June 19 **PennWorks FREEZE**	June 20	June 21	June 22
				BLACK OUT PERIOD		
June 23	June 24 **WEEKLY PAYROLL LEGACY**	June 25	June 26	June 27	June 28	June 29
			BLACK OUT PERIOD			
June 30 **FINAL SYSTEM CHECK** ▬▬▬	July 01 **GO-LIVE** **7/1 TRANSACTIONS** **WEEKLY PAYROLL LEGACY**	July 02	July 03	July 04	July 05	July 06
July 07	July 08	July 09 **WD WEEKLY PAYROLL**	July 10	July 11	July 12 **WD WEEKLY PAY DATE**	July 13

Payroll Processing

Pay Cycle	Pay Period	Payroll Run	Check Date
Last Monthly Pay in Legacy	6/1 – 6/30	6/18 (Tuesday)	6/28
Last Weekly Pay in Legacy	6/24 – 6/30	7/1 (Monday)	7/5
First Weekly Pay in Workday	7/1 – 7/7	7/9 (Tuesday)	7/12
First Monthly Pay in Workday	7/1 – 7/30	TBD	7/31

Cutover Activity Key Dates

Activity	Cutoff Date	More Information
PennWorks	6/18/19	Beginning with run of monthly pay cycle
Blackout Period	6/19/19 to 7/1/19	Only key transactions allowed in legacy (e.g., time reporting)
Workday in Production for Core Team	6/26	Activities for core team begin, manual updates, validation, etc.
Catch-Up Transactions	6/27 - 6/29	Replay key transactions that occurred during blackout period
Go-Live	7/1	Workday available
Payroll Balance Catch-Up	7/2 - 7/6	Convert balances from final legacy payroll run

Office of the Comptroller

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 15, 2019!

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 2018 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 15—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 2015, 2016, and 2017 is also eligible. So you could get back even more than this year's maximum of $6,318. File for 2015, 2016, and 2017 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.

2018 Income Eligibility Based on Filing Status

# Qualifying Children	Single	Married (Filing Jointly)	Maximum Benefit
None	$15,270	$20,950	$519
1	$40,320	$46,010	$3,461
2	$45,802	$51.492	$5,716
3 or more	$49,194	$54,884	$6,431

Accessing W-2's for Tax Years 2016 and Later

The Tax Office has received numerous requests from employees for instructions on how to access their W-2s. Please share the below information with your employees to assist them in accessing their tax information.

To Access W-2s for Tax Years 2016 and later:

- Click on **My Tax Info** in the **My Pay** section at U@Penn.
- Log in using your **Pennkey** and **Password**.
- Enter your **birthdate** (mm/dd/yyyy) and the last four digits of your SSN. Click on **[Continue]**.
- Read about protecting your tax information. Click on **[Continue]**.
- Click on the link that reads **Click here for W-2 information for tax years 2016 and later**.
- You are redirected to the ADP website. Click on the **Pay** icon on the left.
- In the **Tax Statements** box, select the tax year of the Tax Statement you want to view.
- Click on **Download Statement** to download the W-2.

International Student and Scholar Services (ISSS) is pleased to offer the following PSOM Brown Bag Workshops for Department Administrators in Spring 2019:

Go to Knowledge Link
http://knowledgelink.upenn.edu/
and type 'PSOM Brown Bags' in the Find Learning Search Box

J-1 Exchange Visitors Workshop	March 4th 1:00 – 3:00 p.m.
H-1B Visa Workshop	March 28th 1:00 – 3:00 p.m.

INDIVIDUAL SERVICE PROVIDERS: CLASSIFICATION AND PAYMENT TRAINING

The following **Individual Service Provider** training has been added to Knowledge Link:

> More will be added!

Friday, March 15, 2019 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

Save the Date

MODELS OF EXCELLENCE

20th Anniversary

Award Ceremony & Reception

April 23, 2019
4pm
Irvine Auditorium

2019 Models of Excellence Honorees
Presented
by
Amy Gutmann, President
Wendell Pritchett, Provost
Craig Carnaroli, Executive Vice President
Jack Heuer, Vice President for Human Resources

Penn Human Resources   www.hr.upenn.edu/models

Congratulations to this year's honorees! This year Penn's Models of Excellence Program honors 92 exceptional staff members who play key roles in Penn's successes every day.

2019 marks the 20th anniversary of the Models Awards. Since 1999, the Division of Human Resources has received 3,200 nominations, recognized 1,100 honorees and more than 7,500 faculty and staff members have cheered on their colleagues. Please save the date for the 2019 Models Ceremony on April 23, 2019 in Irvine Auditorium, 4pm-5pm. Reception immediately following.

SRA International
Society of Research Administrators International

2019 Delaware Valley Chapter Meeting

DELAWARE VALLEY CHAPTER MEETING

May 13, 2019
Houston Hall, University of Pennsylvania
Philadelphia, PA

Save the date for now…click here for more information.

'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 2019. These sessions are hands-on 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.

Monday, March 4, 2019
10 a.m. – 12:00 p.m.
Wednesday, April 3, 2019
1:00 p.m. – 3:00 p.m.
Thursday, May 2, 2019
10 a.m. – 12:00 p.m.
Monday, June 3, 2019
1:00 p.m. – 3:00 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.

Quarterly Quote

"An investment in knowledge always pays the best interest."
-Benjamin Franklin

HOW TO ORDER A NEW ENDORSEMENT STAMP QRG

Below are the steps for how to order a new Endorsement Stamp from Telrose Office Depot

- Navigate to **BEN Financials** https://benapps.isc-seo.upenn.edu/
- Click on **BEN Financials**
- Logon using your **BEN Financial User Name** and **Password**
- Click on **Requisitioner>Requisitioner Home Page**
- Click on **Non-Marketplace Request**
- Select/Enter the following information for each field:
  - o **Item Type: Goods Billed by Quantity**
  - o **Description: 221381datestamper**
    - ☞ *Enter the six digit number plus the name of the item with no space.*
  - o **Category: OFFICE.PROMOTIONAL**
  - o **Quantity: Enter the amount needed**
  - o **Unit of Measure: Each**
  - o **Unit Price: 68.99**
  - o **Supplier Name: TELROSE CORPORATION**
  - o **Site: PHILADELPHIA-6**
  - o **Supplier Item #: 221381datestamper**
- Click on **[Add to Cart]**
- Click on **[View Cart and Checkout];** continue with the checkout process

Once the Requisition has been submitted an approved, create and send an email to support@telrosecorp.com and include the PO # in the Subject. In the body of the email, include the details of the stamp.

According to Telrose/Office Depot this will enhance the success and efficiency of this order.

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
123118	Quarter 2 - Weekly	10/01/18	12/31/18	01/28/2019	02/04/19	04/05/19
	Fall Semester – Monthly	07/01/18	12/31/18			
063019	Spring Semester – Monthly	01/01/19	06/30/19	TBD	TBD	TBD

These dates can also be 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, 2019**

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

1. What is the Check Date for the first weekly pay in Workday@Penn?
2. Name one person who is receiving a Models of Excellence Award this year.
3. When is the next Individual Service Providers: Classification and Payment Training?
4. When is the next Penn Marketplace Information Session?
5. What is the Tip: for Accessing BEN Financials for new End-Users?

Spring Forward
March 10th 2:00 a.m.

Last Quarter's Winner
Congratulations!!
Rhonda Frenkel
Assistant to the Vice-Dean and Directors
Wharton MBA Program for Executives

BEN Knows

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…

… All **Non-PO payments** are to be entered using the Non-PO Payment Request form on the Penn Marketplace. If you are paying a **new vendor**, they **must be onboarded** and approved as a supplier/payee into the Penn Marketplace. The Non-PO Payment Request form will route through the appropriate approvals before it will be sent to BEN for payment processing.

…Will Calls
- When submitting a Non-PO Payment Request form in Penn Marketplace, check the box for **Will Call** on the **Additional Information** page.
- If submitted and approved by **3:45 p.m.** the check should be **issued the next day**. *Note: The check will be issued if there are no issues such as validation errors or duplicate invoice numbers.*
- It is the responsibility of the department to check BEN financials to see if the check is ready for pick up. Checks can be picked up in the **Accounts Payable** office during open hours between **10 a.m. and 2 p.m**.
- Please have a **valid Penn I.D.** when picking up Will Call checks. Guest cards are not honored as a valid Penn I.D.

Please see the below **criteria Accounts Payable will use** for determining Will Calls:
- Immediate Attachments
- Deposits and Final Payments that are due the day of the event
- Conference and Hotel Registrations
- Payments to the Department of Homeland Security
- Advances for Study Participants
- Awards
- Honorariums