



University of
Pennsylvania
motto...*Laws
without morals are
useless.*

The Bottom Line



NEW BEN HELPS SUPPORT PORTAL!

The BEN Helps Support Portal is now live! You can access the portal at <https://benhelptools.upenn.edu> using your PennKey and Password. This portal is a consolidated 'single-stop' for end-user support, services, and informational resources for various University systems and functional groups.

WHAT UNIVERSITY SYSTEMS ARE INCLUDED?

- BEN Financials
- SAP Concur, Travel & Expense Management
- Penn Marketplace
- MarkView – Imaging
- APEX – Reporting
- Greenphire ClinCard
- Payroll Reallocations
- BEN Deposits – Training & Access

WHAT FUNCTIONAL GROUPS ARE INCLUDED?

From the Division of Business Services:

- Penn Travel Services
- Procurement Services (including Card Programs)

From the Division of Finance:

- Disbursements: Accounts Payable/Greenphire ClinCard/Other Disbursements
- Financial Systems & Training: Applications Group and Financial Training Department

WHAT RESOURCES ARE AVAILABLE?

The BEN Helps Support Portal features an extensive library of 'Solution Articles' greatly increasing your self-service options, as well as electronic forms, links to relevant training, and user guides. If you are not able to find an answer to your question, click on 'New Ticket', in the upper right of the portal, to be addressed by the appropriate support team in a timely manner.

CAN I STILL EMAIL AND CALL FOR SUPPORT?

Any requests submitted via the existing support email addresses will automatically generate a support ticket in the BEN Helps Support Portal. Please do not copy multiple support email addresses, as they will all be linked to the BEN Helps Support Portal. You may also continue to call the BEN Helps phone line at 215-746-HELP (215-746-4357).



NEW! DIVISION OF FINANCE WEBSITE

On February 1, 2021 the Division of Finance launched a new website. It is the same URL: www.finance.upenn.edu. On the new website, content is organized around high-level topic areas, i.e. Payroll & Taxes, Accounting & Reporting, Payments and Disbursing Funds, etc., along with landing pages for each department and links for users to visit external websites for Research Services, Global Support Services, and Student Registration & Financial Services. We elevated content previously tucked away in tabs to the main menu structures. And by revamping the Financial Policy Manual, it should be easier to navigate and search.

There are a series of redirects that should allow you to continue to use many of the old URLs, but we encourage you to review your bookmarks and update them accordingly, especially if you link directly to documents in any of your materials.

If you notice any errors/edits needed, please submit a ticket at <https://financeits.freshdesk.com/support/home> or email financeits@upenn.edu.

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New Costing Allocations Security Role

A new security role, the costing allocations analyst, assigns costing allocation or changes organizational assignments for workers in their supervisory organizations. Formerly, someone would have needed the security role of HR analyst to perform these business sub-processes. With a more focused role, a costing allocations analyst benefits from reduced Workday notifications typically provided to an HR analyst. The new role retains the HR analyst view access necessary to perform the processes on costing allocations. Costing allocations analysts are identified by school/center security partners working in conjunction with Workday security. The security role of HR analysts will retain the ability to assign costing allocation or change organizational assignments.

New Duplicate Management Framework for Staff Recruiting

Recruiting-enabled security roles in schools and centers, such as primary recruiter and recruiting coordinators, have more control over duplicate record management for staff hires during the Workday staff recruitment business process. For more detail and a demonstration, access the recent [webinar recording](#) and [slides](#).

New PTO Payout Calculation for Exempt Staff

Workday's paid time off (PTO) balance payout calculation for full-time exempt monthly paid staff uses the calculation of annual salary divided by 2,080 to provide an hourly rate. Part-time exempt monthly paid staff is prorated, based on the percentage of a full-time schedule worked. Although exempt monthly paid staff are paid on a salary basis, PTO accrues and is used in hourly increments. For purposes of PTO accrual and usage, full-time exempt monthly paid staff are treated as working 40 hours per week (8 hours per day/5 days per week). This is for tracking purposes only and is not intended to reflect actual hours worked. Please refer to the [paid time off policy](#) of the Division of Human Resources.

Students Working Remotely Must Use a Campus Work Address

Effective January 1, 2021 students working remotely due to COVID-19, including student workers and work-study students as well as graduate students receiving

stipend payments, must have their work address changed to an on-campus work location. These students will be subject to Pennsylvania and City of Philadelphia withholding taxes, as appropriate. Additional information on the process is provided in [Return to Campus – Instructions for HR Analysts](#).

Updated Manual Timesheet

An [updated spreadsheet](#) has the complete series of weekly pay periods through fiscal year 2022. A manager or timekeeper uses this retroactive timesheet for pay periods greater than six weeks in the past. Use Workday for [retroactive time adjustments](#) less than six weeks in the past.

Workday Reports and Notifications

- **Reports & Analytics Dashboard.** Workday users now have a convenient Workday dashboard to view Workday-delivered and custom-built reports for which they have the security role access to run. Find and use the new dashboard through the worklet on the home page. The [Report Inventory on the Web](#) will be removed by April 1, 2021.
- The **Timeblocks Not Approved** report has more actionable data: If a worker has multiple positions, the report will show total hours per position on separate lines with position title and supervisory org; scheduled weekly hours per position will now be visible as an additional data point. Drill down into the report to retrieve the specific timeblocks. You will be able to select a date range to view retroactive statuses.
- **Staff Timesheet Totals Not Matching Scheduled Weekly Hours.** Managers and timekeepers will receive a Workday email alert for staff workers whom they support and whose timesheet totals do not match their scheduled weekly hours. The purpose of the new alert is to help managers and timekeepers identify timesheets that may need additional review/editing.
- **Low Work-Study Balance Notification and Report.** A low work-study balance notification is provided by Workday every Wednesday evening to the affected work-study students, their managers, and the HR analyst of their supervisory org. The notification and report will only provide information of work-study students who had original award amounts for the specific work-study period. If you have any questions, please send an e-mail to seomail@pobox.upenn.edu.



Reports & Analytics

Coming Soon: Student Recruitment in Workday

Student Registration & Financial Services is excited to announce that recruitment for work-study and student worker jobs will take place in Workday beginning March 29, 2021. Workday will replace the Student Employment Management System (SEMS), which is currently used to appoint students to jobs and track their work-study earnings. Hiring managers who do not use SEMS for student recruitment, including monthly paid graduate student positions, will not be impacted by this transition and can continue to use their existing processes.

In addition to payroll activities that already occur in Workday, hiring managers will be able to use Workday to post work-study and non-work-study positions to a student-specific career site, accept online applications from the active student population, and extend offers and student offer letters. Students will search and apply for positions from this career site, all within Workday.

The Student Employment Office within SRFS will continue to oversee student employment policies and processes.

Combining recruitment, hiring, time tracking, pay, and reporting in one system of record will streamline and enhance the student employment experience for

both departments and students. The transition will also lead to the following benefits:

For hiring managers:

- Student information is integrated directly into Workday
- Automatic notification of low work-study balances (to student managers)
- View student eligibility for work-study within Workday
- Leverages growing Workday expertise among Schools and Centers since July 2019 launch

For students

- More efficient recruitment and hiring process leads to faster onboarding
- Real-time updates to job search listings when positions are posted or filled
- Automatic notification of low work-study balances
- View total work-study award (*future enhancement*)

The teams working on the student employment enhancement in Workday will respond to University and Workday requirements and developments as they occur. Student Employment will share more details about the transition to and timeline for Workday in the weeks to come, including new and updated resources and opportunities for training. If you have questions in the meantime, please contact:

seomail@pobox.upenn.edu

Work Address of Non-Philadelphia Residents

This is a reminder that as the University continues to return to work on campus, HR Analysts and HR Partners must update the Work Address of non-Philadelphia residents who were working remotely to the campus address as they return to their on-campus worksite. Additionally, non-Philadelphia residents will need to review and update their tax information.

Guidance for HR Partners/Analysts and for Individuals is available on the [Workday](#) website to assist with making these updates.

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

hcmsolutioncenter@upenn.edu

Comptroller's Office

IMPORTANT INFORMATION – CITY WAGE TAX PAID IN 2020

The year 2020 was an unusual year in many respects. **One of the impacts is that more individuals may be eligible for a refund of City Wage Taxes paid in 2020 than in prior years.** The City of Philadelphia has issued new guidance on applying for City Wage tax refunds for the calendar year 2020, which includes a new form for nonresidents working remotely due to the COVID-19 pandemic.

Previous guidance provided by the City, as set forth in our January 29, 2021 communication, outlined a process for institutions to submit requests for refunds on behalf of its nonresident employees. However, the University has made the determination not to make such a submission as this could cause a delay in employees receiving their refund.

Philadelphia City Wage tax refunds are available to nonresidents of Philadelphia who worked outside of the City but had Philadelphia wage taxes withheld for those days. Philadelphia residents are subject to the City Wage tax withholding regardless of where they worked and are not eligible to request a wage tax refund.

For calendar year 2020, there are two different forms (discussed in more detail below) that are available for individuals to claim a Philadelphia City Wage tax refund:

- 2020 COVID EZ Wage Tax refund petition - New 2020!
- 2020 Wage Tax refund petition - same as prior years

Any refund claim must be filed within three years from the date the tax was paid or due, whichever date is later.

2020 COVID EZ Wage Tax Refund Petition

Non-residents of Philadelphia may claim a refund of Philadelphia City Wage tax withheld for days they were required to work remotely outside of the City and had Philadelphia wage taxes withheld. **To claim a refund, individuals must:**

- Complete the form according to instructions.
 - Both the employee and their supervisor must sign the form if a [paper form](#) is submitted.
 - If the form is submitted [online](#), only the letter from the employer needs to be included.
- Attach a letter from the employer on company letterhead with the dates you were required to work remotely. This [letter](#) is available on the Division of Finance website. This letter covers the period March 16, 2020 (the date remote work began) to May 31, 2020 (the date employee's work locations were updated to reflect their remote work location). Philadelphia City Wage Tax was no longer withheld and local taxes based on the updated work location were withheld effective June 1, 2020.
- Attach a copy of your 2020 W-2 indicating Federal, Medicare, State, and Local wages.

2020 Wage Tax Refund Petition

As in previous years, employees who are required to work at various times outside of Philadelphia within a calendar year and who are **non-residents of Philadelphia**, may file for a wage tax refund claim directly with the City of Philadelphia. This [form](#) should be used for time worked outside of the City not related to COVID, such as for the time period from January 1, 2020 through March 13, 2020. The completed petition form must include the following:

- 2020 W-2 w/Federal, Medicare, State, and Local wages
- Statement of dates worked outside the City of Philadelphia signed by both the employee and the employer
- Signatures from both the employee and the employer
[Guidance](#) for supervisors who must sign the employee's petition is available on the Division of Finance website.

If you have any questions, please contact the Employee Solution Center at solutioncenter@upenn.edu.

Note that for any days worked outside Philadelphia, the employee may be liable for taxes in other jurisdictions within Pennsylvania or in another state. It is the employee's responsibility to determine whether they have any such liability, to file the appropriate tax forms, and to make any payments due to such jurisdictions.

Comptroller's Office

W-2's FOR 2020

Your 2020 Form W-2 is now available for view, download and print in Workday under the Pay icon after logging in. For questions on how to view and print the form, please refer to the Self Service: Access to W-2, W-4, and State Reciprocal Forms tip sheet.

Individuals who did not elect to go paperless for their W-2 may receive more than one W-2 in the mail. This is due to individuals having more than one state and/or local tax jurisdiction related to the change to remote working caused by the COVID-19 pandemic. If an individual's W-2 prints on more than one page, each page will be mailed in a separate envelope by ADP and will be numbered 1 of x, 2 of x, etc.

The 2020 W-2 form will have the recipient's Social Security Number (SSN) masked for security purposes. Only the last four digits of the SSN will be visible and the remaining digits will be replaced with asterisks or X's, for example ***-**-1234. This masking applies to W-2 forms sent in the mail or made available electronically in Workday or via the ADP website.

The ADP version includes the Control Number which is used to upload your tax information into your tax preparation software. If you need to review the ADP version for filing purposes, access it electronically by clicking on the "My Tax Info" link on the U@Penn portal. For more information on understanding your W-2, including FAQs from the Payroll Tax office, the Payroll Tax website explains the contents of the various boxes on the form. If you have additional questions, please contact the Penn Employee Solution Center at:

solutioncenter@upenn.edu

PAYROLL TAX UPDATES 2020

Federal Taxes: The federal withholding tax tables for 2021 can be found in the IRS Publication 15 at: <https://www.irs.gov/pub/irs-dft/p15--dft.pdf> Note that as of early February this information is still in draft form and subject to change.

Social Security Wage Rate: The 2021 Social Security wage base is \$142,800.

Social Security Tax Rate: The 2021 tax rate remains at 6.2% and the maximum tax that an employee would pay will be \$8,853.60.

Medicare Tax Rate: The Medicare tax rate remains at 1.45% in 2021 for wages under \$200,000. Wages in excess of \$200,000 are taxed at 2.35%.

PA State Unemployment Insurance

Employee Rate: The tax rate remains at 0.06% for 2021.

PA State: The tax rate for 2021 remains at 3.07%.

Philadelphia City: As of July 1, 2020, the Resident Rate is 3.8712% and Non-Resident Rate is 3.5019% and remains the same for the beginning of 2021.



Comptroller's Office

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 that meet certain eligibility requirements. If this is your first time filing for the EITC, you can get refunds for 2017, 2018, and 2019. The average EITC tax refund in Philadelphia is about \$2,500 per year.

The deadline to file is April 15, 2021!

You could qualify to receive an EITC if:

- You (and your spouse, if filing a joint return) have a valid Social Security number (SSN)
- Your 2020 earned income is \$56,844 or less,
- You are 25 to 65 years of age OR have a qualifying child

Here's all you need to do:

File your federal tax return and claim your credit.

File for Free

The City of Philadelphia is partnering with the United Way of Greater Philadelphia and Southern New Jersey to provide FREE tax preparation so that you can get your full refund. Log on to <https://www.myfreetaxes.com/> to get started and skip the tax prep services that charge up to 40% of your refund.



2020 Income Eligibility Based on Filing Status

# Qualifying Children	Single	Married (Filing Jointly)	Maximum Benefit
None	\$15,820	\$21,710	\$538
One	\$41,756	\$47,646	\$3,584
Two	\$47,440	\$53,330	\$5,920
Three or more	\$50,954	\$56,844	\$6,660

Quarterly
Quote

Tell me and I forget. Teach
me and I remember. Involve
me and I learn.

Benjamin Franklin

Comptroller's Office

PAYROLL CHECK PRINTING OUTSOURCED TO WELLS FARGO

The Payroll Department initiated a project to evaluate University operations during the COVID-19 pandemic. As most operations have been moved to remote, the payroll check printing process still remained on-site. In an effort to promote safety and sustainability and to implement a more efficient process, the payroll check printing process will be outsourced to Wells Fargo Bank. This change will be effective March 5, 2021.

The Wells Fargo payslip will look very different than your Workday payslip. Wells Fargo will only display the gross payment, employee deductions, and your net pay. Any and all other information will continue to be displayed on your Workday payslip. Employees are able to view their payslips by following the tip sheet - [Self Service: Understand Your Payslip](#).

Payroll Operations strongly encourages employees to sign up for direct deposit. For infor-

mation on how to sign up for direct deposit, refer to the [Self Service: Manage Pay Elections](#) tip sheet. The benefits of direct deposit are the following:

- free and/or reduced-fee banking services;
- elimination of a trip to the bank;
- automatic deposit of funds when the employee is away from home;
- elimination of "holds" on out-of-state checks;
- elimination of lost or stolen checks;
- minimization of delays due to delivery services outside of company control; and
- flexibility to deposit into multiple accounts.

If you have any questions or concerns, please contact Employee Solution Center at:

solutioncenter@upenn.edu

or

215.898.7372

A NEW REQUIREMENT FOR INTERFUND JOURNALS (OBJC 15XX) IN BEN FINANCIALS

Manual Journals that are recorded in BEN Financials to the Health System Interfund using object codes 15XX are now required to be accompanied with a **six-digit Lawson Accounting Unit (AU)** and a **five-digit UPHS Chart of Accounts number (HSCOA)**. The Health System Interfund is the combination of object codes 15XX with either CNAC-Fund 210-000000; CNAC-Fund 400-014003; or with CNAC-ORG-Fund 510-5194-000000.

For most journal categories, a mandatory drop-down list of the Lawson AU and the UPHS COA accounts will be provided in the Descriptive Flexfield (DFF) at the end of each journal line using the Health System Interfund. An optional field will be available to enter the **nine-digit Lawson Activity Code** for those Lawson AU's that require it.

For a handful of journal categories which already require information to be entered into the journal line's DFF, free-form DFF space is available for the six-digit Lawson Accounting Unit (AU) and the five-digit UPHS Chart of Accounts number (HSCOA) because drop-down lists for these accounts are not currently populated in

these journal categories. The six-digit Lawson Accounting Unit (AU) and the five-digit UPHS Chart of Account number (HSCOA) should be entered manually to record Health System Interfund activity when the drop-down lists are not available.

IMPORTANT! Users should obtain the correct Lawson information from the Health System contact person or department closely related to the transaction before entering the Health System Interfund transaction in BEN.

Please also refer to the webpage below for more information on booking Health System Interfund journals in BEN:

Go to <https://www.finance.upenn.edu/Accounting-Operations>

- Click on the box 'Accounting and Reporting Topics'
- Click on 'Health System Interfund'

For questions, go to the BEN Helps Support Portal at <https://benhelps.upenn.edu/support/home>.

ANNOUNCING PENN PROCUREMENT SERVICES!

Penn Purchasing Services is now *Penn Procurement Services*. This name change best represents the department's full portfolio of services that covers purchasing systems, sourcing, contracting, supplier management, and innovative programs in alignment with the [Penn Compact](#) supporting sustainability, supplier diversity, and economic inclusion.

Although it is not necessary to take action on any existing documents, in the weeks and months ahead, you will notice the new name and logo on Procurement Services' website at www.upenn.edu/procurement, the department's standard email templates, and in other places such as contracts, RFP documents, and policies.

Questions may be directed to:
procure@upenn.edu



INTRODUCING THE PENN SUPPLIER DIVERSITY AND ECONOMIC INCLUSION IMPACT AWARD

The call for nominations is now open for the new [Penn Supplier Diversity and Economic Inclusion Impact Award](#). This award recognizes the leading actions of any individual or team that drives intentional impact in the area of supplier diversity and economic inclusion at Penn. This award program is a chance to spotlight those individuals who are championing supplier diversity and inclusion across campus, as well as to celebrate projects that are driving economic impact with diversity-owned businesses.

Visit the [Supplier Diversity and Economic Inclusion Impact Award page](#) to review the nomination guidelines and information about the submittal process. Nominations will remain open until Friday, April 2, 2021. Award recipients will be honored at the University's annual supplier diversity and inclusion event.

2020 Green Purchasing Awards Announced

Penn Purchasing and Penn Sustainability recently announced the 2020 Green Purchasing Award recipients. They are:

- *Megan Ryerson, Ph.D., UPS Chair of Transportation, Associate Dean for Research, Weitzman School of Design* who led an innovative initiative in the Spring of 2020 with her students to explore the sustainability impact associated with Penn's air travel consumption. The results of the students' findings provided the [Environmental Sustainability Advisory Committee's](#) air travel working group with valuable information that supported them in better understanding Penn's air travel practices and options for addressing the resulting carbon emissions.
- *Cheryl Hickey, Faculty Recruiting/Distinguished Lecturer Coordinator, Computer & Information Science Department, School of Engineering and Applied Science* who eliminated a waste stream from the Department's kitchens. She made a switch from disposable cups and purchased 150 permanent ceramic replacement mugs to meet the department's needs. The move will stop approximately 12,000 disposable cups from reaching a landfill each year.

You can learn more about these novel approaches by [clicking here](#).

FALL 2020 EFFORT FORMS (ERS PERIOD 123120) ARE NOW AVAILABLE

Fall 2020 effort forms (ERS period 123120) for Pre-Review and Certification and are now available for review and due for completion by **Friday, April 2, 2021**.

As a **guideline**, we strongly recommend that depts follow the below timeline:

Dates	ERS Role/Function	ERS Activity for the 123120 Effort Reporting Period
2/1/2021 – 2/7/2021	Department Coordinators	Department Coordinators review/correct effort form assignments - especially for new and terminated employees
2/8/2021 – 3/15/2021	Pre-Reviewers	Pre-Reviewers correct/adjust effort forms by making needed reallocations in PRA, record required cost sharing, and complete Pre-Review
3/16/2021 – 4/2/2021	Certifiers	Certifiers discuss questions about effort forms with Pre-Reviewers and settle any discrepancies and certify all effort forms in their queue. Certifiers can begin certification on an effort form as soon as Pre-Review is complete.

Reminders

- 1) Negative account balances on effort forms **MUST** be resolved prior to completing PreReview. These are often the result of retroactive Workday changes and must be corrected through the Payroll Reallocations Application. ERS will **NOT** allow effort forms to proceed with negative balances.
- 2) DHHS over-salary-cap cost sharing on applicable effort forms and other reportable cost-shared effort must be recorded during PreReview in the "Cost Sharing" column in the effort form. To avoid processing errors, it is best to report cost share by % (not by \$) on the effort form. ORS will continue to monitor the reporting of over-salary-cap cost share, where required.
- 3) If any ERS user has **NOT** enrolled in Penn's two-step verification, they will be blocked from accessing ERS
- 4) Effort forms must be reviewed and re-certified if payroll reallocations are completed after the initial reporting period closes. As a best practice, prereview and certification must be completed within a reasonable time from the date the effort report is re-generated for payroll reallocations.
- 5) Effort reporting for weekly-paid employees has been eliminated beginning with the Fall 2019 reporting period. Managers and department timekeepers should make sure to approve timesheets in Workday.
- 6) For schools with 9-month faculty appointments and summer pay, summer payments are incorporated into the regular effort reporting process according to the pay period end date. June 2020 payments are folded into Spring 2020 effort reports and **July and August payments are reported on Fall 2020 effort reports.**

EFFORT REPORTING CALENDAR

Effort Reporting Period	Description	Start Date	End Date	Date Forms are Available	Closing Date / Due Date
123120	Fall Semester	07/01/20	12/31/20	02/01/21	04/02/21
063021	Spring Semester	01/01/21	06/30/21	TBD	TBD

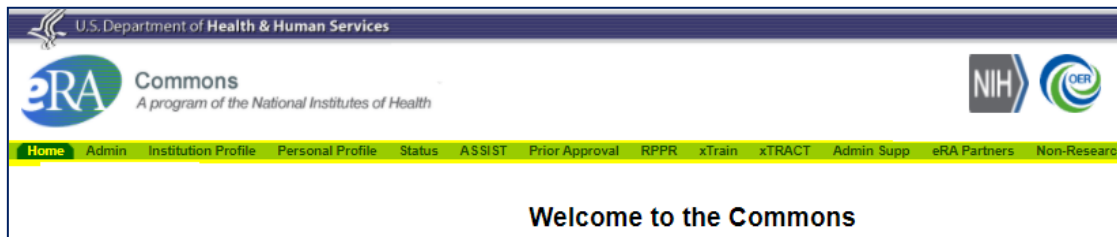
For additional effort reporting resources and reference materials, including FAQs, go to:
<https://researchservices.upenn.edu/systems/effort-reporting-system/>

On Tuesday, **January 12, 2021**, NIH transitioned to a new eRA Commons login-in screen and landing screen after initial login.

Notably, the new design will result in a change in how the various eRA modules (e.g., Personal Profile, Status, RPPR, xTrain) are accessed.

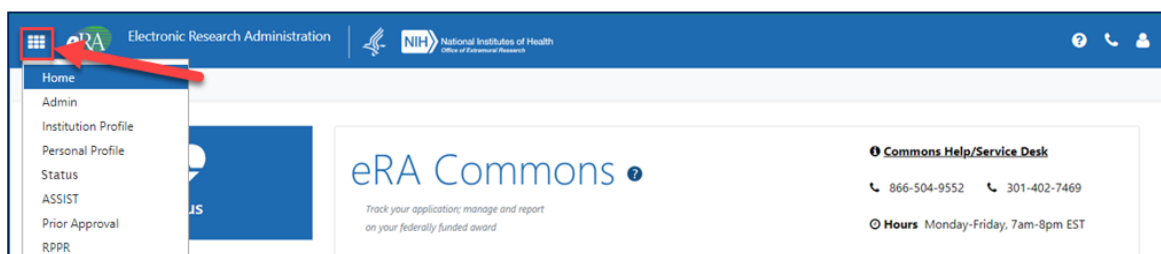
Currently, when you access the landing page (the page on first login), the eRA modules are available on a navigation bar at the top of the screen (see Figure 1 below).

Figure 1. Current eRA Commons landing page



The newly designed landing page requires the user to select an Apps menu icon to access the eRA modules (see Figure 2 below).

Figure 2. eRA Commons landing page eRA modules access in new design effective 1/12/2021

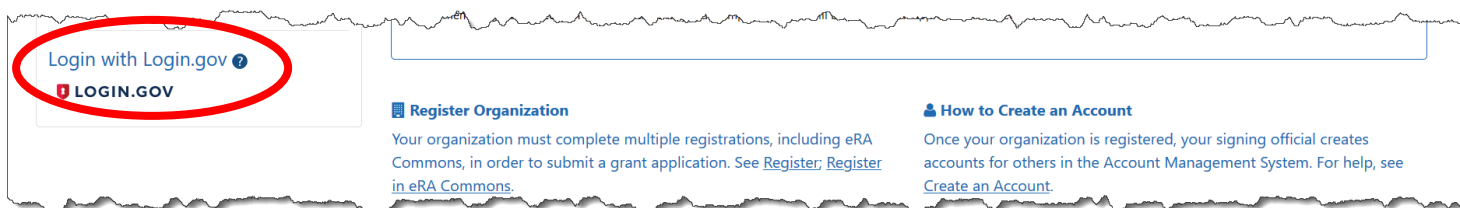


2-Factor Authentication via Login.gov

Notice the new login page, like the current version, has an additional login option called “**Login with Login.gov.**” NIH is currently working to make 2-factor authentication (2FA) a requirement for access to eRA Modules, which will be mandatory as of **September 15, 2021**.

NIH encourages users to switch to the 2FA through login.gov as soon as possible before the mandatory date. Information on login.gov and detailed step-by-step instructions on initial setup at login.gov can be found at:

[Two-Factor Authentication: Access eRA Modules via login.gov.](#)



Additional Resources:

[New eRA Commons screens Youtube video \(5 minutes\)](#)

NIH Guide Notice: [NOT-OD-21-028- Rollout of Redesigned eRA Commons Home and Landing Screens in January 2021](#)

[Two-Factor Authentication via login.gov Videos](#)

[Access eRA Modules via login.gov FAQs](#)

[Login.gov Help](#)



Upcoming ISSS Workshops

We are pleased to let you know that ISSS will be hosting a series of workshops over the next couple of months to help familiarize Penn business administrators and other departmental stakeholders with the logistics involved in hiring different categories of foreign nationals.

You can find out more information and register by clicking the links below. Please note that these events are intended **only** for business administrators and others involved in the hiring of foreign nationals at Penn; we kindly ask that you do not share these invitations with international students or scholars.

- [Overview of Hiring Foreign Nationals](#)
Wednesday, March 10, 2021 | 1:00PM EST
In this workshop, participants will learn about H-1B, O-1, OPT, Permanent Residence, and other immigration options.
- [J-1 Exchange Visitor Workshop](#)
Monday, March 22, 2021 | 1:00PM EST
This workshop is designed to provide an overview of different J-1 Exchange Visitor categories at Penn (e.g., research scholar, visiting professor).
- [H-1B Visa Workshop](#)
Monday, April 12, 2021 | 1:00PM ET
This workshop is designed to provide an overview of the H-1B Specialty Occupation Worker status and internal procedures.
- [International Case Study Session for Penn Business Administrators](#)
Wednesday, April 21, 2021 | 1:00PM ET
Learn about common international hiring scenarios at Penn and how to approach them.

Sincerely,
ISSS Staff



Important! Remote Work Relocation

Dear Colleagues:

Remote work at Penn, at present, is largely a temporary response to a global health crisis. As we've managed work in this environment, we've found that many of our roles accommodate a temporary remote work arrangement in whole or part and many of our employees have come to like working remotely, at least some of the time. To address this, Penn is in the process of developing short and long-term remote work visions and policies.

As we finalize our post-COVID remote work strategy, we are advising employees who are looking to relocate out of the tri-state area to work remotely from a new location in the future to hold off on making such long-term plans until Penn's Post-COVID procedures are finalized and publicized. If waiting is not feasible, you will be required to seek formal approval for this change under Penn's current [Flexplace Policy](#) prior to finalizing arrangements or making a move. Of course, consistent with governmental COVID-19 mandates and requirements, Penn has supported employees working remotely. However, in normal times, this policy requires both a written request to work remotely and formal approval for this arrangement, via a written agreement.

A non-temporary remote work arrangement has legal, tax and benefit implications. At this point employees should not relocate/permanently leave the Tri-state area without notifying their manager and Human Resources Designee who will then review with the Divisions of Finance and Human Resource and the Office of the General Counsel.

If you have any questions regarding remote work relocation please contact your Human Resources representative.

Jack Heuer
Vice-President of Human Resources and MaryFrances
McCourt
Vice President of Finance and Treasurer

NGSS RELEASE 1 INFORMATION SESSION, FRIDAY MARCH 5TH

The Next Generation Student Systems (NGSS) project is a large-scale effort to deploy modernized student information technology to better support the University's [student records](#) and [financial aid](#) systems.

In order to implement these systems within the planned [timeline](#), the NGSS project needs to limit changes to current systems that would impact functionality for both Release 1 (August 2021) and Release 2 (March 2022). As of January 1, 2021, the NGSS project began a Current Systems Freeze Period, which will continue until the Release 2 Go-Live in March 2022.

Exceptions to the freeze period will be made for known regulatory changes and those identified on the [Academic Calendar](#). In addition, the NGSS team, in collaboration with appropriate University stakeholders, will review requests for non-regulatory exceptions during the freeze period to determine whether the need warrants an exception. The linked [NGSS Current Systems Freeze Information Packet](#) and the [NGSS Current Systems Freeze](#) page on the NGSS website provide further details on the freeze period, including the list of impacted systems, contacts for exception requests, and specific data/transactions with freeze dates occurring in Spring 2021.

Please reach out to the team with questions or concerns related to the Current Systems Freeze period by emailing:

ngss_freeze_cr@lists.upenn.edu

On **Friday, March 5, 2021**, the project will host a virtual Information Session about the systems that will be available starting in Fall 2021. For those who would like to learn more or are interested in attending the session, please visit the [Information Session](#) page on the NGSS website.



FROM THE DESK OF THE CASHIER...

Cash and Check Deposits

Cash Deposits

- Franklin Building lobby complete. Smart Safe is still operational for cash deposits.
- Access to lobby and Smart Safe area is still limited. Contact Cash Management if you need to make deposits and don't have access.

Check Deposits

- Cash Mgmt on site weekly to process deposits.
- New mailboxes in hallway beside security desk. Drop in Cash Management mailbox.
- Provide Remote Deposit Capture (RDC) scanners to Schools/Centers using [on campus](#).
- One per school/center at no charge
- Additional scanners can be ordered for \$468 ea.
- Depending on office set up, one scanner can be used by multiple people/computers
- IT Resources Required/Driver installation

Desktop Deposit Module

Check Handling Policies

- Check Storage
 - Store processed checks in a secure location, such as a locked drawer or box.
 - Checks have valuable MICR data and have an obligation to protect our vendor/customer data
- Check Retention
 - 14-30 days for checks returned for image quality
 - Check Destruction
 - SHRED all checks after the retention period. Do not discard checks in the trash.

Mobile Deposits

- Phasing out. Worked well during the crisis, but not meant for long-term.
- Reconciliation difficulties/challenges with check quality.
- Encourages users to deposit remotely; we want to keep checks on campus and ensure they're properly handled and destroyed.

Electronic Receipts

- Still encouraging vendors to send payments electronically. Cash Mgmt. can provide the account information and verification letter from bank.

FreshDesk

- New support email address
support@penncdm.freshdesk.com
- Old cash inbox continues to be operational. Autoreply set up to send email to FreshDesk.



<https://benhelps.upenn.edu/support/home>

Solution Article Spotlight

Non-PO Preparer & Approver in the Penn Marketplace

Preparers of Non-PO Payment Requests

A Preparer is a person within a School and Center who can create and submit Non-PO Payment Requests. There is no limitation on the number of Preparers in any given School or Center and anyone with Penn Marketplace access can be a Preparer. These individuals are tasked with accurately creating a Non-PO Payment Request for submission. To gain access as a Non-PO Payment Request Preparer, you need to take the below training in Knowledge Link*:

1. Penn Marketplace Non-PO Payment Request - Knowledge Building (October 2020)
2. Penn Marketplace Non-PO Payment Request - Application Training for Preparers*

Approvers of Non-PO Payment Requests

Approvers have the ability to approve a Non-PO Payment Request to authorize payment. Each Approver will be assigned a dollar-level approval and can authorize payments up to that amount for their assigned ORGs. The three standardized approval levels are \$5,000, \$50,000, and \$250,000 for Approvers across the University. An Approver also may forward Non-PO Payment requests. It is the responsibility of an Approver to review all of the information on the Request and any attachments for complete and accurate information, a valid University business purpose, and compliance with all University policies before authorizing it for payment.

To gain access as a Non-PO Payment Request Approver, you need to complete the above training courses in Knowledge Link for Preparers, and then the below for Approvers:

1. Penn Marketplace Non-PO Payment Request - Application Training for Approvers*

* Once the above training courses are complete, a [Penn eForm - BEN Financials Access Request](#) will need to be submitted - in the 'Requested Access-Penn Marketplace Non-PO Payment Requests' section, you should click the radio button for 'Add' for Preparer/Approver. Do not click 'Add' for the SP Payment Request Preparer unless you need access to the SP Payment Request form. SP="Special Payment". SP (Special) designation is limited to the review and approval of high-dollar corporate-type disbursements for transactions that have been previously approved at higher authority levels. Please consult with your School/Center Business Office if you are unsure if you need to have SP Payment Request access.

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, 2021**

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

1. What two forms can I use to apply for City Wage taxes paid in 2020?
2. My department will be posting a Work-Study position in Fall 2021. Where do I post this position?
3. What is HSCOA and when/why is it used?
4. Who is the current ABA Chairperson?
5. In what application would a Costing Allocations Analyst make an update?
6. If you have a question regarding BEN Financials, Payroll Reallocations and/or Purchasing Cards, what new support resource is available?

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

Kate Marini

**Business Administrator
Department of Fiscal Operations
School of Dental Medicine**



***Spring Forward
March 14th 2:00 a.m.***

Association of Business Administrators (ABA)

CALL FOR NOMINATIONS TO STEERING COMMITTEE

It's that time of year when we come to you and ask for nominations for the FY2022 and FY2023 ABA Steering Committee. **Nominations are due by April 30, 2021.**

The Association of Business Administrators Steering Committee is comprised of 7 members and we are looking for 4 new members. Steering Committee members serve an elected terms of two (2) years from July through June. Current Steering Committee members Kelly Hartman, Val Morgan, and Nyzinga Patterson will be rotating off at the end of this year. Those remaining on the Steering Committee for FY2022 are Judy Farrell, Paul Weidner, and Alketa Katie Xhori. (Yes, that's only 6 people for those counting. One person left early & the FY2021 Steering Committee has been operating with only 6 members).

The ABA was formed to promote the exchange of information among those responsible for administration of the University's business and to improve communication among members of the association, and between those members and the faculty and the University administration.

If you would like to nominate someone you think would be a good choice for a leadership position, please send their name, email, and school/center name to Val Morgan, ABA Secretary, at vmorga@upenn.edu. If you would like to serve on the ABA Steering Committee, you may nominate yourself by sending your information to Val. We will reach out to all who are nominated to get their approval before we open up the voting.

Again, the last date to submit nominations is **Friday, April 30, 2021**. Voting will begin Monday, May 17, 2021 and end on Tuesday, June 1, 2021. A special link for voting will be sent to ABA members on Monday, May 17, 2021.

Please send any questions about being a Steering Committee Member or the nomination & election process to Nyzinga Patterson, ABA Chairperson, at nyzinga@upenn.edu.

Did You Know...

... You can join the University's Association of Business Administrators by going to the link below:

<https://www.finance.upenn.edu/aba/>

Fiscal Year 2020-21 Steering Committee

Nyzinga Patterson Chair

215-898-7594
nyzinga@upenn.edu

Paul E. Weidner Co-Chair

215-898-1447
weidnerp@upenn.edu

Alketa Xhori Treasurer

215-898-3547
alketa@upenn.edu

**Val Morgan
Secretary**
215-573-8111
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**Judy Farrell
RSVP/Member Management**
215-573-3224
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**Kelly Hartman
Event Planner/Web Master**
215-573-6629
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