



The Bottom Line



Workday@Penn

SEVEN WAYS TO STAY UP-TO-DATE WITH WORKDAY@PENN

1. Check out the [latest news and announcements](#).
2. Learn about [key business changes](#) that augment tip sheets.
3. Consult more than 86 [tip sheets](#), available 24/7, categorized by topic and security role.
4. Read the news round-up and calendar reminders in the [Workday@Penn Digest](#).
5. Attend live or view the videos of [Webinar Wednesdays](#).
6. Book 30 minutes of one-to-one or small group assistance during [Office Hours](#).
7. [Request a presentation](#) for your large group meeting.

Quick Tip: Use the Chrome internet browser to log on to the [Workday application](#).

DATES MATTER IN WORKDAY

Workday is date driven. Pay close attention to date fields including but not limited to: end date, start date, target hire date, and recruiting start date. Dates are connected across transactions including processes to recruit, hire, and manage a worker's job.

STEPS FOR A SEAMLESS ONBOARDING EXPERIENCE

Obtain [Clarification of Roles in Onboarding New Hires](#) after they are hired into a position in Workday, and the steps to optimize a seamless onboarding experience. The material includes an appendix with an onboarding checklist, a sample onboarding workflow for non-resident aliens, and sample email language to the new hire from Workday and Penn Community.

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25 YEAR CLUB CELEBRATION

The Division of Human Resources

Invites members of the University Community with 25 or more years of service to their annual celebration.

Thursday, October 10, 2019

5 – 7 p.m.

Join us for conversation

companionship and dinner!

Registration is required for attendance by

Friday September 27th 2019

Please contact 25yearclub@hr.upenn.edu

or

215-898-3463 with any questions.

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WORKDAY “CHANGE JOB”

FUNCTIONALITY & RELATED RESOURCES

When HR Analysts and HR Partners make a change to a Worker’s job, certain actions are available depending upon your access to the Worker.

When a Worker is in a Supervisory Organization you:

- Do not support, the initial transaction from the Job Change menu will be “Request Transfer.”
- Do support, the transaction from the Job Change menu will be “Transfer, Promote, or Change Job.”

To help explain these actions, here are a variety of resources:

1. [Video Recorded August 7 on the Updated Change Job Process](#) (36 minutes)

2. [Staffing Checklist Decision-Making Support Document](#) (2 pages)

Before performing a hire, add additional job, or change job, ask a series of questions and find their answers by searching for the Worker’s name in the “All of Workday” and “People” tab: Does the worker have a pre-hire record? External Student record? Affiliate record? Contingent record? An existing job in Workday in your organization? An existing job in Workday outside of your organization? Once you have confirmed whether the worker has an existing record, use the Staffing Checklist document to help you determine the appropriate Workday action (**along with a link to the accompanying tip sheet**).

3. [Staffing Events Tip Sheets](#) (Various)

HELPFUL COMPENSATION REPORTS IN WORKDAY

Compensation and payroll reports allow you to perform transactions and better understand and analyze compensation and costing data. Run the reports on an ad-hoc basis to help facilitate compensation and payroll job processes. Access tip sheets on how to run reports [here](#), and more detail on compensation reports [here](#).

COSTING ALLOCATIONS OVERVIEW

A costing allocation is a process in Workday to allocate payroll costs across various accounts. Consult this [tip sheet](#) for step-by-step instructions. Some notes: Historical costing allocations may be required to be deleted if segments are inactivated. Costing allocations can be updated with start and end dates. End dates for grant funds are key to accurate encumbrance calculations for budgeting purposes. Use the calendar icon to update an end date. Costing allocations do not need to be end-dated to match compensation end-dates, and can be left open-ended if not utilizing funds (e.g. 5-fund) with end-dates.

TIMESHEETS SENT BACK OR DENIED

If a timesheet is sent back to the Worker and is not updated in time by Monday at 1 PM, the timesheet will be paid out through the mass submit process. If Managers and Timekeepers do not want to pay out for time because the time was incorrect, they need to delete all of the timeblocks from the worker’s timesheet to ensure that the Worker is not paid for that time. You are able to perform retroactive time adjustments for the past four weeks.

HOLIDAY ADJUSTMENT IN TIMESHEETS

For the Labor Day holiday and other University holidays, non-exempt workers are automatically credited based on their assigned worker schedule. For workers without set schedules, they may receive 8 hours even though they normally work less or more than 8 hours/day. To compensate for this, apply the time entry code ‘Holiday Adjustment’ in the worker’s timesheet as needed and enter the negative or positive hours to offset the automatic 8 hour holiday credit. Click [here](#) for instructions.

HELPFUL TIPS FOR WORKDAY HR ANALYSTS

To improve operational efficiency, HR analysts can refer to [these Eight FAQs](#), such as: Help! Workday notifications are flooding my Outlook inbox -- or -- How can I update my search preferences in Workday?





Treaty Exemptions

As the new semester arrives and new students & scholars begin their educational journeys or appointments, please be aware that there are tax agreements between the US and some foreign countries that may exempt certain payments to foreign nationals from federal taxes. Tax Treaty exemptions are granted on a calendar year basis for payments such as scholarship/fellowships and employment income. As part of the Onboarding process, all monthly paid individuals who qualify for tax treaty benefits will be contacted through email by the Payroll Office. These individuals will receive instructions to log in to the Foreign National Information System (FNIS) and print/view their tax treaty document. They must sign, date and return the appropriate tax treaty documents for the 2019 tax year to the Payroll Office via [Secureshare](#). Please note, at this time, we are unable to provide treaty benefits to weekly paid individuals.

In order to meet the deadline for the September 2019 payroll, employees must respond with a signed tax treaty by Friday, September 20, 2019. If they do not meet the September deadline they may still apply for the exemption, however the treaty benefits will not take effect until October. Please note that Payroll **will not refund** the Federal Withholding Tax for individuals who miss the September 2019 deadline. The individual can claim the exemption when filing their 2019 tax return. Please contact the Penn Solution Center at (215) 898-7372 or hcmsolutioncenter@upenn.edu with any questions or concerns.

Avoid Identity Theft and Mail Delays – Turn off Printing of Paper Form W-2!

To secure your personal information, the Payroll Office strongly encourages all employees to turn off printing of paper W-2 forms. Doing so, will help avoid delays or errors in receiving your W-2 caused by mailing.

Beginning with tax year 2019, Forms W-2 will be available for viewing and printing in Workday. You will also still be able to upload your tax information into most tax filing software. To turn off printing of your W-2, refer to the [Self Service-Access Tax Withholding Forms](#) tip sheet. These steps should be completed before December 31 to ensure that a W-2 for the current tax year will not be mailed.

Note: If you had previously opted out of having your W-2 printed by ADP, you will still need to go into Workday and make the election to only receive electronic forms by following the steps outlined in the tip sheet.

Forms W-2 for tax years 2018, 2017 and 2016 are available on the ADP website by clicking on the “My Tax Info” link on [U@Penn](#). For copies of Forms W-2 for tax years 2015 and prior, contact the Penn Solution Center at (215) 898-7372 or hcmsolutioncenter@upenn.edu.

**Daylight Savings Time
November 3, 2019**



An upgrade to the PennERA (Electronic Research Administration) application is currently being planned with a target implementation date of **April 2020**. The upgrade is required to effectively respond to current and future business needs and will bring improved functionality to users.

WHAT WILL CHANGE?

Upgrade highlights include:

- Updated user interface – screens will have an updated look and feel with a more intuitive interface
- New user access and routing changes module – replaces paper processes for requesting and approving access to PennERA modules and changes to routing and approval paths
- Moving from NIH form set E to F
- Performance enhancements
- Fixes to known usability and interface issues

PROPOSAL DEVELOPMENT ENHANCEMENTS

Proposal Development-specific enhancements include:

- Improved Proposal Development Budget Tool
- Improved personnel selection function

- Multiple budget versions savable to the PD record

REFERENCE MATERIALS & DEMO SESSIONS

Updated reference materials, including the Proposal Development User's Guide and Quick Reference Guides, will be made available on the PennERA website upon rollout to help users transition to the upgraded system. In addition, demo sessions will be held to introduce users to the updated interface and enhancements. Training needs will be evaluated, and more information will be provided directly to users as the project progresses.

QUESTIONS

PennERA users will be contacted directly with information about the upgrade as rollout approaches. If you have any questions, please send an e-mail to:

pennerahelp@lists.upenn.edu

For general information on PennERA, please visit the website at:

<https://www.pennera.upenn.edu/>

– The PennERA Project Team

NEW FEDERAL AGREEMENT FOR FY20

EMPLOYEE BENEFIT RATES FOR SPONSORED PROGRAMS

The employee benefits rates for use on sponsored programs during FY20 and for all new proposals

FY20 Full-Time Employees: 29.5%

FY20 Part-Time Employees: 9.0%

FY21 Provisional Rate Full-Time Employees: 32.3%

FY21 Provisional Rate Part-Time Employees: 8.9%

The Employee Dependent Tuition Benefit Rate component decreased from 2.3% to 2.2%.

For more information, go to: <http://www.upenn.edu/researchservices/penndata.html>

Effort Reporting Update



The Spring 2019 effort forms (ERS period 063019) have been available for review and are due for completion (PreReview and Certification) by **Friday, October 4, 2019**.

ERS v10 SYSTEM ENHANCEMENTS

- Updated system security
- Remote access (without VPN) is restored
- New Payroll Reallocation application manages ALL reallocations
- Auto-update of Effort Report when reallocations occur (reduces need for manual effort forms)

EFFORT REPORTING PROCESS UPDATES

- After the 063019 period, effort forms for weekly paid staff no longer required
- Effort period 083019 will be the last stand alone summer reporting cycle
- Elimination of PostReview (Certifiers cannot change effort %s on reports)

- Online training replaces instructor led training for new administrative roles

EFFORT REPORTING REVISED/NEW TRAININGS

Revised/updated content can be found by clicking on 'Item Details' here:

[SP@P: Effort Reporting - Knowledge Building](#)

Additionally, a new online training module **replaces** the former in-class training. Current ERS users who seek additional guidance on how to PreReview in version 10 of ERS are also welcome to complete the application training. This training can be found here:

[Effort Reporting System - Application Training](#)

FUTURE

Possible Data Warehouse availability of ERS reporting data.

REMINDER

NIH over-salary-cap cost sharing on applicable effort forms must be recorded during PreReview in the 'Cost Sharing' column in the effort form. We will begin monitoring if PreReviewers are recording over-the-cap cost share, where required.

Upcoming Business Objects Classes

Introduction Business Objects*

Tuesday, September 24, 2019

9:30 a.m. – 4:30 p.m. \$450

Tuesday, September 25, 2019

9:30 a.m. – 4:30 p.m. \$450

To register email learnit@isc.upenn.edu. Seats fill up fast!

*Note: Only the Introduction class is being offered at this time. These are two separate dates.

Important Guidance from NIH on What to Include in "Other Support"



NIH has released new guidance and FAQs on disclosure of foreign activities in NIH grants. This includes clarification of what information should be included in Other Support documents as well as what should be included as a Foreign Component in NIH grant applications. The guidance may be found at:

<https://grants.nih.gov/grants/guide/notice-files/NOT-OD-19-114.html>

The guidance includes the following, which may be different from current interpretations of the requirements:

- Expands individuals for whom other support reporting is required beyond PI and Key Personnel

- Requires reporting of in kind support
- Expands current projects and activities to include reporting regardless of effort committed to those activities
- Clarifies that activities including non-U.S. resources conducted in the U.S. should be reported on other support, even though they are not a foreign component.

Please take the time to review this important notice. As a reminder, new foreign components require prior NIH approval. ORS pre-award staff is happy to assist with any requests for new foreign components, and I am happy to assist in resolving any issues that may arise out of this change.



HOME EVENTS RESOURCE CENTER FALL 2019 GRANTS CONFERENCE NSF POLICIES AND PROCEDURES

Search

FALL 2019 GRANTS CONFERENCE

November 18 - 19, 2019 / Boston, MA

Boston Marriott Cambridge. Registration Cost \$450.

Who Should Attend?

These events are primarily designed to provide new faculty, researchers and administrators with key insights into a wide range of current issues as NSF, including proposal preparation and merit review basics, award management topics and other important information.

Why Attend?

This two-day conference is a must, especially for new faculty, researchers and administrators. Program officers representing each NSF directorate will be on hand to provide up-to-date information about specific funding opportunities and to answer attendee questions.

Click here for more information and to register:

<https://nsfgrantsconferences.com/fall-19-conf/>



Penn Marketplace's supplier portal has been in place for over a year, and more and more suppliers are adopting the additional tools and invoicing the University directly. With the transition to more automated processes, centralized processing, and common payable practices, Penn is adjusting payment to suppliers based on invoice receipt date.

As of October 1, 2019, the timing of payments made to suppliers will be based on **when an invoice is received and entered in Accounts Payable**. As was previously communicated with the suppliers and within Penn, this transition is applicable regardless of whether payment terms are *Immediate*, Net 10, Net 30, or Net 45. For those suppliers following best practice and using Penn's supplier portal, the invoice date, and invoice receipt date are essentially the same; therefore, it will be seamless to those suppliers.

DISCONTINUING ACCOUNTS PAYABLE'S PAYMODE PROGRAM

We are planning on discontinuing the use of our Bank of America Paymode program on January 31, 2020. Communications will be going out to Paymode vendors to notify them of the change. They will be given the option to sign up for the Epayables virtual credit card program or ACH/Direct deposit by registering in the Penn Marketplace. Suppliers will be instructed to contact their buyers if they want to become a registered Supplier. If no action is taken on the part of the Supplier they will be transitioned to check payments with Net 45 day terms based on invoice receipt date starting February 1, 2020. Terms for suppliers with exception terms will not be impacted.

If you have any questions please contact Renee Nowaczyk (reeneenow@upenn.edu).

This change also does not affect suppliers/payees who are individuals currently paid on *Immediate* terms and the timing of their payments will not be impacted by this transition. Furthermore, those suppliers that have been onboarded since the launch of the supplier portal are already on receipt-date timing.

Those suppliers most impacted by this change will be those businesses that continue to mail invoices to Penn. Time will be added to their end-to-end invoice-to-payment cycle, particularly if there is a delay in moving the invoice through the physical receipt and approval process. This change will help drive direct, electronic invoicing, while also eliminating excessively early payments to those suppliers that back-date invoices to expedite payment.

Additional communications will be sent to suppliers, and should you field any questions or concerns from suppliers or payees with whom you do business, please direct those inquiries to SupplierSupport@upenn.edu.

RESEND A PO VIA PENN MARKETPLACE

Within Penn Marketplace, users have the ability to resend a copy of an approved Purchase Order directly to the supplier or a contact. Purchasing will, therefore, discontinue the use of the Resend Purchase Order form found on its website effective **Monday, September 9, 2019**.

Instructions on how to resend an approved Purchase Order from Penn Marketplace can be found by clicking [here](#). In the event you are not able to resend the Purchase Order, please contact PurchasingSupport@upenn.edu for assistance.



PENN PURCHASING SERVICES SUPPLIER SHOW 2019

TUESDAY, SEPTEMBER 24

10 AM - 2 PM ANNENBERG CENTER FOR PERFORMING ARTS 3680 WALNUT STREET



DATA-DRIVEN PURCHASING POWER

OVER 50 SUPPLIERS SUPPLIER SAMPLES DOOR PRIZES LUNCH

Green Purchasing Award Presentation 12:15 PM
Office Supply Swap Pop-Up Store
Office Ergonomics 101 Demo - Lower Ambulatory

 **Penn**
Purchasing Services

For more details and preregistration: www.upenn.edu/purchasing/supshow19

Did You Know...



...Starting August 1, 2019, Penn-affiliated international travel are able to register using MyTrips!

Registering Penn Travel is now easier! For more information, or to schedule a training for your department, contact Jaime Molyneux.



You can register your international travel via MyTrips via the Penn Global International Travel Guidance website:

<https://global.upenn.edu/travel-guidance/register-your-trip>

Penn TEM International Travel site:

<http://cms.business-services.upenn.edu/penntravel/international-travel.html>

Quarterly Quiz

Instructions: To participate in the contest, please submit your answers to the questions at the right, found in this issue of *The Bottom Line*, via email to doftraining@pobox.upenn.edu no later than **December 1, 2019**

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

Last Quarter's Winner

Congratulations!

Gabriella Frisone

Administrative Assistant

Wharton Department of Statistics

1. What is the date the timing of payments made to suppliers will be based on when an invoice is received and entered in AP?
2. What is the date the 'Resend Purchase Order' form will be discontinued?
3. What is the date for the Purchasing Supplier Show?
4. Where do I go in BEN Financials to add my 'Deliver-To' location? Hint: Two words.
5. From the **Helpful Tips for Workday HR Analysts** what is the navigation path for adjusting Workday notifications?

QUARTERLY QUOTE

"If you fail to plan, you are planning to fail."

Benjamin Franklin



ACCESS CURRENT/ACTIVE SHOPPING CART

From the **Requisitions Home Page**:

- Click the **Shopping Cart** link located at the top right of the screen or click on the link within the Shopping Cart box to access your cart
- Continue shopping or checking out

VIEWING REQUISITIONS APPROVAL HISTORY

From the **Requisitions Home Page**:

- Select the **'Shop'** tab and look for **'My Requisitions'**
- Click on the link in the **Status** column to view **Approval History** for a specific requisition
- To see additional Requisitions click on **[Full List]**

VIEWING REQUISITIONS TO APPROVE

From the **Requisitions Home Page**:

- Select the **'Requisitions'** tab
- Select the **'Approvals'** tab
- Leave the View set at **'Requisitions to Approve'**
- Select the Requisition you want to approve by clicking on the **Requisition Number**

REMINDERS REGARDING DELIVER-TO LOCATION

New Users: Please be sure to add your Deliver-To Location in **'My Profile'** **prior to** shopping. Otherwise an error message will appear.

Current Users: Once your Deliver-To Location is added it remains in your User Preferences. When you transfer to another Department, please remember to update your Deliver-To Location.

Please note: On occasion your Deliver-To location may be deleted, e.g. system updates, and you may need to Add your Deliver-To Location again.

Here is how to **add the 'Deliver-To Location'**.

- From the **'Requisitioner'** responsibility, go to **Requisitions Home Page**
- Click on **'User Preferences'** link in the top right corner of the page
- On the General Preferences page, click the **'My Profile'** link
- Under the **'Delivery'** section, enter a default location in the **'Deliver-To Location'** field
 - Tip: Type %the room number% to locate
- Click **'Apply'**

VIEWING INVOICE HOLD(S) INFORMATION*

In addition to Markview, you can view Invoice Hold(s) information from the Invoice Inquiry, PO Manager, or Requisitioner responsibility.

- From **Invoice Inquiry** select **Invoices** or from **Purchase Order** select **Inquiry** then **Invoices**
 - Enter **PO number** and click on **[Find]**
 - From **Invoice Details** form, select **Holds** tab
 - The information shown on one line is for one Invoice. Be sure to select the proper line for multiple Invoices.
 - The Invoice Holds form is now shown. This form contains the **Hold Name, Hold Reason, Held By, Hold Date, Release Name, Release Reason, Released By, and Release Date.**
- From **Markview**:
 - Towards bottom of Invoice screen click **Holds**
 - The following information will be displayed: **Hold Lookup Code, Hold Reason, Hold Date, PO Number, and PO Line Number**
- From **Requisitioner***:
 - Click on the **requisition number** or the **requisition description** to view the details
 - Scroll down to the requisition lines, click on the **'Detail'** icon for the hold information
 - Under the **'Invoice'** section, click on the **'Unhide'** link to view active hold information

***Note:** You still have to manage all active holds by either placing the appropriate stamp in MarkView and/or entering the receipt in BEN Financials.

INVOICE HOLDS Holds are placed on PO invoices for the following reasons:

Request Comment by Accounts Payable (AP)

- AP requires add'l information or clarification

Maximum Shipment Hold (MAX SHIPMENT)

- Total invoice line amount > total PO line amount by \$25 or more

Quantity Ordered Hold (QTY ORD)

- Quantity billed on invoice > 10% of quantity ordered on PO.

Quantity Received Hold (QTY REC)

- Created when an invoice for a PO exceeding \$10,000 or a PO line has been marked 'receipt required' and no receipt was entered in BEN.