

Payroll/Personnel Training Agenda

Day 1

- Payroll Overview
- Human Resources
- Payroll Database

Day 2

- Office of Int'l Programs
- Corporate Tax
- Payroll Database (Continued)

Day 3

- Payroll Database (Continued)
- WESD
- Quiz on Payroll Database

Day 4

- Risk Management
- Time Reporting
- Quiz on Time Reporting

Day 5

- Payroll Department
- Salary Management
- BEN Reports

Important Web Sites At-a-Glance

Payroll Department

<http://www.finance.upenn.edu/comptroller/payroll/>

University Human Resources

<http://www.hr.upenn.edu/>

Affirmative Action

<http://www.upenn.edu/affirm-action/>

Office of International Programs

<http://www.upenn.edu/oip/>

Corporate Tax Office

<http://www.finance.upenn.edu/comptroller/tax/>

Risk Management

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

School of Medicine

<http://www.med.upenn.edu/>

School of Medicine Departments

<http://www.med.upenn.edu/departments.html>

Post-Doctoral Programs

<http://www.med.upenn.edu/postdoc/>

School of Medicine Faculty Affairs

<http://www.med.upenn.edu/facaffrs/>

Student Employment

<http://www.sfs.upenn.edu/seo/>

Add Your Own Here:

Resources for Payroll System Administrators

Payroll Department

Web page: <http://www.finance.upenn.edu/comptroller/payroll/>

Contact e-mail: payroll@pobox.upenn.edu

Contact phone: (215) 898-6301

The mission of the Payroll Department is to fully utilize our employees, technological resources, and partnerships in order to deliver timely and accurate compensation to all of our customers.

Services provided by the Payroll Department include processing all weekly and monthly paychecks for the University, W-2 forms and City Wage Tax refunds, additional pay, and direct deposit forms.

The Payroll Department also provides general customer service support to departments and individuals for Payroll questions and issues.

The Payroll website contains key payroll processing information, such as:

- Closing Schedules for each pay period
 - Due dates for the receipt of all payroll-related documents
 - Deadlines for entering online changes for weekly paid staff
 - Deadlines for entering online changes for monthly paid staff
 - Dates when salary management reports in the Payroll system should be run in order to match that month's salary actuals and encumbrances in the BEN Financials General Ledger System
 - Accrual dates for Paid Time Off
 - A Payroll Forms Library and a listing of Policies and Procedures for the accurate and efficient processing of payroll and payroll-related documentation
- ☛ Note: Be sure to read the Payroll System Banner Screen and any messages from the Payroll Listserv for up-to-the-minute information for Payroll Administrators.

University Human Resources

Web page: <http://www.hr.upenn.edu/>

Contact e-mail: askhr@hr.upenn.edu

Contact phone: see website for contact listings for each School/Center

There are several areas of information available on the Human Resources web site that are of great use to Payroll Administrators, including:

- The Hiring Officer Resource Center
 - A compilation of policy, procedure, and reference information for University Hiring Officers

<http://www.hr.upenn.edu/recruitment/hiringofficer/default.asp>

- Human Resources Policy Manual
 - Listings of HR policies by title, number, or relevant category

<http://www.hr.upenn.edu/policy/>

- U@Penn
 - A “self-service” site where employees can find detailed information about their employment at Penn, including detailed Pay, Benefits, and personal profile information

<https://sentry.isc.upenn.edu/uatpenn/>

☞ Note: U@Penn is a secure site that may be accessed only by logging in by using your PennKey and PennKey password

- Human Resources Forms Library
 - A repository of Benefits, Compensation, Recruitment and Staffing, and Staff and Labor Relations Forms

<http://www.hr.upenn.edu/forms/>

☞ Note: Be sure to check here for commonly used documents such as Timesheets, Overtime Authorization, and Request for Time Off forms.

Affirmative Action

Web page: <http://www.upenn.edu/affirm-action/>

Contact phone: (215) 898-6993
Contact TDD: (215) 898-7803

The mission of the Office of Affirmative Action and Equal Opportunity Programs is to provide central leadership and support for the University's efforts to achieve an educational and work environment that is diverse in race, ethnicity, interests, abilities, and perspectives.

The office will ensure the implementation of equal opportunity, affirmative action, and non-discriminatory policies through education, training, and active partnership with others from the campus and the broader Philadelphia communities. Services of the office include, but are not limited to:

Complaint Resolution

- Investigate complaints of harassment and other forms of prohibited discrimination.
- Coordinate the voluntary mediation of disputes related to harassment and other forms of prohibited discrimination.
- Provide advice to staff regarding discrimination issues.

Consultation and Training

- Provide educational programs on affirmative action, equal opportunity, and non-discrimination issues.
- Provide technical assistance to University personnel, departments, Schools, and Centers on affirmative action and non-discrimination issues.

Search and Selection

- Offer suggestions on outreach and recruitment strategies.
- Review searches for compliance with Penn's Affirmative Action and equal Opportunity policy.

Services for Faculty and Staff with Disabilities

- Consult with faculty and staff with disabilities on requests for reasonable accommodation, as well as consulting with managers and supervisors who need information on how to provide reasonable accommodation to employees with disabilities.
- Authorize the use of the Penn Access Transit (PAT) services for faculty and Staff, in conjunction with the office of Student Disability Services.
- Monitor construction and renovation projects to ensure that programs, services, and activities are accessible to people with disabilities.

Office of International Programs

Web page: <http://www.upenn.edu/oip/>

Contact e-mail: oip@pobox.upenn.edu

Contact phone: (215) 898-4661

The Office of International Programs (OIP) promotes, assists and coordinates international activities throughout the University of Pennsylvania. OIP articulates Penn's international character and global perspective - for internal and external constituencies, in the United States and in other parts of the world.

OIP's activities include the following:

- Working with schools and faculty members to enhance Penn's role as an international institution of education and research by providing services to international students and scholars at the University of Pennsylvania
- Coordinating the University's comprehensive linkages with selected higher education institutions outside the United States
- Advising Penn undergraduates about study abroad and administering Penn Abroad Programs

Risk Management & Insurance

Web page: <http://www.finance.upenn.edu/riskmgmt/>

Contact phone: (215) 898-4327

The Office of Risk Management & Insurance is responsible for coordinating the risk management activities of the University in the areas of property insurance, general and automobile liability insurance, **workers' compensation** and medical, dental and veterinary professional liability.

The Office identifies and evaluates areas of potential exposure to risk and implements measures to reduce the risk of loss University-wide.

Corporate/ Payroll Tax Office

Web page: <http://www.finance.upenn.edu/comptroller/tax/>

Contact phone: (215) 898-6573

The Corporate Tax Office has the primary responsibility for ensuring that the University of Pennsylvania and its subsidiaries/affiliates comply with all federal, state and local tax laws. This encompasses:

Preparing all tax returns for the University and it's subsidiaries/affiliates

Advising the University community on matters pertaining to unrelated business income tax, corporate income tax, excise tax, employment tax and Pennsylvania sales and use tax

Authorizing payments made to foreign nationals through the Payroll system and Accounts Payable

Other useful links/information on the Corporate Tax web site, includes:

- Guide to Graduate Student & Post-Doctoral Appointments
- Honoraria Payments
- Independent Contractor Determination & Certification (C-12 Form)
- Intermediate Sanctions

Student Employment

Web page: <http://www.sfs.upenn.edu/seo/>

Contact e-mail: seo@sfs.upenn.edu

Contact phone: (215) 898-6966

The mission of the Student Employment Office is to provide Penn students with job opportunities offered through the Federal Work-Study Program, International Student Work Program, and Job Referral Service.

Under the "Employers" tab on the Student Employment Office there are several sections of valuable information for Payroll Administrators including:

- Job Management
- Manuals
- Training
- Forms
- Schedules

Post-Doctoral Programs

Web page: <http://www.med.upenn.edu/postdoc/>

Contact email: postdoc@mail.med.upenn.edu

Contact phone: (215) 573-4332

The School of Medicine established the Office of Postdoctoral Programs in July 1997 to serve as a central resource and to enhance and support the work experience of postdoctoral appointees, their faculty mentors, and staff engaged in research and research training.

On July 1, 2001, in accordance with Affiliation Agreements signed by the Schools of Veterinary and Dental Medicine, the role of OPP was expanded to support the postdoctoral appointees, faculty mentors and staff of these two schools.

Post-Doctoral Programs (cont'd)

Be sure to check this web site for useful information pertaining to Post-Doctoral Appointments, including:

- Appointment Letters
- Appointment Manual
- Open Positions/Post A Position
- Policies & Guidelines

School of Medicine Office of Faculty Affairs

Web page: <http://www.med.upenn.edu/facaffrs/>

Contact email: facaffrs@mail.med.upenn.edu

Contact phone: (215) 898-4621

The School of Medicine Office of Faculty Affairs maintains a web site that, while specific to the Medical School, contains useful reference information for all University personnel responsible for managing academic personnel processes.

Refer to the Faculty Coordinator section of this web site for additional information.

☞ Note: Faculty Coordinators in areas other than the School of Medicine should check with their own School for contact information as relating to Faculty Affairs.

Office of the Associate Provost

Web page: <http://www.upenn.edu/assoc-provost/>

Contact phone: (215) 898-4032

The Office of the Associate Provost manages the academic personnel process including recruitment, appointments, promotions, tenure cases, grievances, oversight of faculty policy changes, and administrative review of faculty policies.

Refer to this web site for useful information pertaining to Faculty Appointments, including:

- The Handbook for Faculty and Academic Administrators
- Forms and Templates, including Guidelines for Submission of Appointments and Promotions Dossiers and the Proposal for Personnel Action documents
- Affirmative Action Guidelines and Procedures For Faculty Appointments, Promotions and Terminations
- The Provost's Staff Conference (PSC) and Provost's Staff Conference Subcommittee(s) Schedules

☞ Note: The Provost's Staff Conference is an advisory body to the Provost that meets to consider proposals for academic appointments and promotions. These start at the departmental level and if approved, are then sent for review by the school's faculty personnel committee and dean.

Cases approved at this level are then considered by the Provost's Staff Conference.

Each case is documented with a vita, bibliography, and evidence of teaching and letters of evaluation, including those of external reviewers.

Appointments and promotions that are approved are forwarded to the President for consideration and then to the Trustees for their approval.

Payroll Quick Reference Guide

Exempt Employee Types – Monthly Paid

- TYPE 1 Includes all Faculty, Research Associates and Administrative employees.
- TYPE 4 Exempt (Graduate) Students. For example: Teaching Assistants, Teaching Fellows, Research Assistants, and Research Fellows. For a greater explanation of these job titles see The Guide to Graduate Student and Post-Doctoral Appointments on the following website:
<http://www.finance.upenn.edu/comptroller/tax/appointments.shtml>.
- TYPE 8 Educational Fellowship Recipients. These are graduate students on fellowships paid directly from University of Pennsylvania funds, such as a dean’s account. The compensation for these appointments is also referred to as “stipends”.
- TYPE 9 No employer/employee relationship exists. This type includes retirees, people on long-term disability, Post-Doctoral Appointments and other special situations.

Non-Exempt Employee Types – Weekly Paid

- TYPE 2 Includes Non-Exempt salaried Support Staff. These employees receive monetary compensation for all hours worked beyond 40 in a given workweek.
- TYPE 3 Includes hourly part-time, temporary workers, occasional workers, and full-time members of bargaining units, including the Library.
- TYPE 5 Includes all non-exempt hourly students. For example: Student Worker and College Work-Study students. Student Employees, during those weeks they are in class, should not work or be compensated for greater than 20 hours per week.

Exception Pay

Employees work a standard work week and receive a predetermined salary or pay amount. The standard workweek is determined at the time of appointment and may be 35, 37.5, or 40 hours. All Exempt and Non-Exempt Salaried Staff (Types 1, 2, 4, 8, 9) are paid on an Exception basis. The difference with Type 2 employees is the paid time off to which they are entitled is recorded on a positive basis, meaning you have to enter sick days or paid time off days into the On-Line Time Reporting System for the records to be accurate.

Positive Pay

Positive pay employees work a variable number of hours per week. This time must be reported using the On-Line Time Reporting option on the Payroll/Personnel system to receive any pay. All Type 3 and Type 5 employees are paid on a positive pay basis.

- P - Positive (Hourly employees, types 3 or 5)
- E - Exception (Salaried employees, types 1,2,4,8, or 9 employees)

Student Workers

<p><i>Student Worker A – In Class</i></p> <p>ERN Type: SW1 Object Code: 5134/5135 Job Class Code: 599070</p>	<p><i>Work-Study – Regular</i></p> <p>ERN Type WSR Object Code: 5139 Job Class Code: Begins with 5153xx</p>
<p><i>Student Worker B – Not in Class</i></p> <p>ERN Type: SW2 Object Code: 5134/5135 Job Class Code: 599071</p>	<p><i>Work-Study – Summer</i></p> <p>ERN Type WS2 Object Code: 5139 Job Class Code: Begins with 5153xx</p>

Temporary Employees

Departments at times hire temporary help to cover for regular employees away on paid time off or to supplement the staff for short periods of time. Temporary Extra Workers may work up to 999 hours in a given year.

The usual codes used for **weekly temporary** employees are as follows:

ERN Type: REG
Object Code: 5134/5135
Job Class Code: 599050

The usual codes used for **monthly temporary** employees are as follows:

ERN Type: RMO
Object Code: 5130/5132
Job Class Code: 399070

ERN (Earnings Type) – Indicates how the employee’s pay will be taxed. This is a 3-character alpha field. Valid codes for this field are:

Professional/ Administrative Employees and Faculty	
RMO	Regular Monthly Pay (Type 1 only)
Administrative Support Staff	
REG	Regular Weekly or Hourly Pay (Type 2 and 3)
S10	Shift Differential at 10% (Type 3 only)
S15	Shift Differential at 15% (Type 3 only)
SHF	Shift Differential at a flat amount (Type 2 only)
Student Worker (Type 5 only)	
SW1	Student Worker A - In class
SW2	Student Worker B - Not in class
WSR	Work Study Student - Regular
WS2	Work Study Student - Summer
Post-Docs (Type 9) *	
PD3	Fellow Job Class: 217603 and 217703, Object Code 5043
PD4	Researcher Job Class: 217500 Object Code 5047
Graduate Students (Type 4) *	
GF1	Teaching Assistant: 217002, Object Code 5049
GF1	Research Assistant: 216061, Object Code 5070
GF5	Teaching Assistant: 217004, Object Code 5040
GF5	Research Assistant: 216060, Object Code 5041
GF6	Teaching Fellow: 217003, Object Code 5048
GF6	Research Fellow: 217303, Object Code 5044
Educational Fellowship Recipients (Type 8) *	
GF2	Job Class: 217401, Object Code 5046

LV (Leave)	
FNL	Funeral Leave
HOL	Holiday Pay
JUR	Jury Duty
MIL	Military Leave
SCH	Sick in the household
SCK	Sick leave
VAC	Paid Time Off
DC (Distribution Change)	
REG	Regular weekly or hourly pay
SHF	Shift at a flat amount
TX (Taxable Income)	
CLL	On-call pay
OS1	Overtime at double time & shift differential at 10%
OS2	Overtime at double time & one-half & shift differential at 10%
OS3	Overtime at time & one-half & shift differential at 15%
OS4	Overtime at double time & shift differential at 15%
OS5	Overtime at double time & one-half & shift differential at 15%
OSH	Overtime at time & one-half & shift differential at 10%
OT2	Overtime at double time
OTD	Overtime at double time & one-half
OTP	Overtime at time and one-half
OTS	Overtime at straight pay
REG	Regular weekly or hourly pay
S10	Shift differential at 10%
S15	Shift differential at 15%
S20	Shift differential at 20%
SHF	Shift at a flat amount
SHV	Shift differential at a variable rate
UBS	Union business

* Note: For all Postdoctoral and Graduate Student appointments, please refer to the “Guide to Graduate Student and Post-Doctoral Appointments,” found at <http://www.finance.upenn.edu/comptroller/tax/appointments.shtml>

Note: There should only be one ERN Type per Job Class Code.

University of Pennsylvania
Financial Training Department

New Hire Information

Offer Letter _____ HR 1/2 _____ W-4 _____ I-9 _____ Vol. ID _____

Instructions: Complete the required information. Where applicable, have the new hire complete their information.

Hire Date: _____ Job Title: _____ Position No: _____

SS#: _____ Name: _____

Local Address: _____

City: _____ State: _____ Zip: _____

Local Phone Number: _____

Permanent Address: _____

City: _____ State: _____ Zip: _____

Permanent Phone Number: _____

Work Phone Number: _____ Work Mail Code: _____

Emergency Contact Name (must be completed): _____

Relationship: _____ Emergency Contact Phone Number: _____

Employee's Birthdate: _____

Marital Status (Circle one): Single Married Divorced Widow or Widower

Ethnicity:

(Optional for employee; mandatory for Payroll data entry)

- A - Native American or Alaskan Native
- B - Black/African American
- C - White/Caucasian
- P - Pacific Islander
- R - Asian
- S - Spanish/Latino

Military Status (Optional)

- A - Active Reserve
- N - Inactive Reserve
- O - Veteran (Other than Vietnam)
- R - Retired
- V - Vietnam Era Veteran
- S - Newly Separated Veteran
- BLANK - No Veteran Status

Education Level: (Circle all that apply)

	Year		Year
B No academic credentials	_____	H Master's degree	_____
C High school diploma or equivalent	_____	I Medical doctorate (M.D., D.D.S., D.V.M., V.M.D.)	_____
D Trade certificate	_____	J Other doctorate (D.Ed., D.So., LL.D., J.D.)	_____
E Some college (most recent year)	_____	K Doctor of Philosophy (Ph.D.)	_____
F Associate degree	_____	L Other (explain: _____)	_____
G Bachelor's degree	_____		

The following may be required for this position:

- | | | |
|------------------------|--|-----------------------------|
| _____ PennCard | _____ Payroll/Personnel Access | _____ Code to Training Room |
| _____ Keys to Office | _____ BEN Financials Access | _____ Desktop Orientation |
| _____ Phone/Voice Mail | _____ (Includes PO, BEN Reports, etc.) | _____ New EE Orientation |
| _____ Computer Access | _____ Purchasing Card | _____ Intro E-mail |
| _____ E-mail | _____ Knowledge Link Access | _____ Other _____ |

University of Pennsylvania
Voluntary Self-Identification Form

The University of Pennsylvania (Penn) is an equal opportunity employer with a policy of non-discrimination. As a federal contractor, Penn must comply with federal regulations pertaining to affirmative action, equal opportunity, and non-discrimination. We ask your assistance in helping us to meet our federal compliance obligations of monitoring our hire, internal hire and transfer processes.

Completion of this form is strictly voluntary. Refusal to complete this form will not subject you to any adverse treatment. The information you provide on this form will be maintained confidentially.

Name _____ Sex: (M) (F) _____ Job Requisition-Ref. No. _____

Job Title _____ Org. No. _____ Department No. _____

The concept of race as used by the Federal government does not denote clear-cut scientific definitions of anthropological origins. A person may be included in the group to which s/he appears to belong, identifies with, or is regarded in the community as belonging. The race/ethnicity categories below have been defined by the U.S. Office of Federal Contract Compliance.

1. Please identify your race/ethnicity by checking one of the categories listed below.

American Indian or Alaskan Native

A person with origins in any of the original peoples of North America who maintains cultural identification through tribal affiliation or has community recognition as an American Indian or Alaskan Native.

Asian – Pacific Islander

A person with origins in any of the original peoples of the Far East, Southeast Asia, the Indian subcontinent or the Pacific Islands. This area includes, for example, China, Japan, Korea, the Philippine Republic and Samoa; and, on the Indian Subcontinent, includes India, Pakistan, Bangladesh, Sri Lanka, Nepal, Sikkim and Bhutan.

Black (or African American)

An individual, not of Hispanic origin, with origins in any of the black racial groups of Africa.

Hispanic (or Latino)

A person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish culture or origin, regardless of race. This does not include persons of Portuguese descent or persons from Central or South America who are not of Spanish origin or culture.

White

An individual, not of Hispanic origin, with origins in any of the original peoples of Europe, North Africa. or the Middle East.

Decline to Identify

2. Veteran status is Federally defined by the following categories. Please check all that apply to you)

Vietnam Era Veteran

A person who served on active duty for a period of more than 180 days, and was discharged or released with other than a dishonorable discharge, or was discharged or released from active duty for a service-connected disability if any part of such active duty occurred in the Republic of Vietnam between 02/28/1961 and 05/07/1975, or in all other cases between 05/05/1964 and 05/07/1975.

Recently Separated Veteran

Any veteran during the one-year period beginning on the date of such veteran's discharge or release from active duty. (Effective December 1, 2003, recently separated veteran shall include any veteran during the three-year period beginning on the date of such veteran's discharge or release from active duty).

Other Eligible Veteran

A person who, as a member of a reserve component under an order to active duty, served on active duty during a period of war or in a campaign or expedition for which a campaign badge is authorized and who was discharged or released from such duty with other than a dishonorable discharge.

Employee Signature: _____

Date: _____

BUSINESS ADMINISTRATOR USE ONLY

Personnel Payroll Codes:

R = Asian

C = Caucasian

A = Native American

B = African American

S = Hispanic

Upon entering the correct code into the Personnel Payroll System, please forward this form to Human Resources, Records Department



Web Enabled Salary Distribution Frequently Asked Questions

Q1. When will updates in WESD actually update payroll data?

A1. Updates from WESD take effect immediately. WESD is a different face on the current payroll data found on the 004 screen.

Q2. Which employees do I have access to?

A2. WESD uses the same security structure as payroll. You should have access to the same employees that you have access to in payroll unless you have Proxy access whereby the Home ORG may authorize access to an individual upon completion of the WESD Proxy Security Request form.

Q3. What happens if I transfer to a new ORG, will I need to change my access to WESD?

A3. As long as you fill out the appropriate payroll security form to include your new ORG responsibilities, access to WESD should happen the day after your payroll access has been granted/modified. If you require Proxy access to an individual, the WESD Proxy Security Request form must be completed and authorized/signed by the Home ORG.

Q4. Is there any place where the 'action history' is shown if a person makes an adjustment in WESD and not from the Payroll system?

A4. Yes, the 'Last Action' field on the 003 screen will be 024 to indicate a WESD update.

Q5. What happens when two people are logged onto the same person at the same time? This may be typical in the 'proxy' situation. Who gets locked out? Can both make changes?

A5. It works the same as the payroll system today. No one gets locked out. As soon as you click on [commit] the record is updated. If someone also commits, then they potentially can change what the last person just did.

Q6. Can I access WESD after 3:00 p.m. on Mondays?

A6. Yes. WESD is available during the published payroll hours. However, please be aware, changes that are made between the hours of 3:00 and 5:00 p.m. to the 004 screen may affect the current payroll period vs. the future payroll period. It is recommended that you wait until the following day (Tuesday) to perform any future adjustments to salary.

Q7. How long is the salary plan data kept?

A7. Indefinitely.

Q8. Can one person be in the Payroll System and one person be in WESD viewing and/ or updating the same person at the same time.

A8. Yes.

Q9. Can I duplicate the line above instead of re-typing the information on the next line?

A9. No.

Q10. Does the entire salary plan get replaced/ erased if I click on [import dists from payroll]?

A10. Yes. Except if the number of lines on the imported payroll does not exceed the number of lines on the salary distribution. For example, if you have 6 lines of payroll and 8 lines on the salary plan, line 7 and 8 will not be overwritten.

Q11. Are employees with a Rate Code of H (Hourly) included in WESD?

A11. No. Rate Code 'H' is an hourly paid employee who is 'positive' paid via on-line time reporting (OTR) and these individuals are not part of WESD.

Q12. How is the annual salary calculated in the upper-right hand side of the WESD screen?

A12. Annual salary is calculated by adding all of the annual salary amounts (Ann. sal. field on left hand side of each job) from all of the active jobs (job end date is within or exceeds the current fiscal year).

Q.13 Can I update SALINC from WESD.

A.13 No.

Q.14 Can I add a job for an employee through WESD?

A.14 No. You can only add new jobs for an employee in the Payroll system. You can add a job to the Salary Plan; however, you cannot move this new job from the Salary Plan to Payroll.

Q.15 Can I change an employee's annual salary in WESD?

A.15 No. You can only change the annual salary amount in the Payroll system.

On-Line Time Reporting

Following are the time sheets that have been turned in to you from your respective supervisors for **Positive Employees**. Please process the payroll for each employee according to the information provided on the timesheet.

Business Office:

Last Name	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Total	Notes
Egitto	1pm-5pm	1pm-5pm	1pm-5pm	1pm-5pm	1pm-5pm			20 hrs.	
Grazianni		10am-12pm		1pm-4pm		9am-12pm		8 hrs.	Change Earn Type to SW1; change job class accordingly
Irwin	9am-5pm	9am-5pm	9am-5pm	9am-5pm	9am-5pm			35 hrs.	Please charge to Dr. Lafferty's grant
McCann	9am-1pm	9am-1pm	9am-1pm	9am-1pm	9am-1pm			20 hrs.	
Tamao									Did not work this week
Signature: Leslie Tyler 07/05/xx					Week Ending: 07/08/xx				

Lafferty Lab:

Last Name	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Total	Notes
Jaffe	8am-5pm	8am-5pm	8am-5pm	8am-5pm		8am-5pm	8am-5pm	48 hrs.	Change hourly wage for this week to \$10
Maccarone							8am-5pm	8 hrs.	
Martin	9am-12pm	2pm-5pm	1pm-5pm	9am-5pm	9am-5pm			24 hrs.	
Proud	1pm-2pm	3pm-5pm	10am-12pm	4pm-5pm	9am-1pm			10 hrs.	
Signature: Theresa V. Lafferty 07/05/xx					Week Ending: 07/08/xx				

1. What is the Penn Policy regarding hours worked by a student in class? How would this effect the hours reported for Martin?
2. Dr. Lafferty informs you on Monday that Maccarone did not show up for work on Sunday. What can you do to correct this?
3. Dr. Lafferty also informs you on Monday that Proud came in to cover for Maccarone on Sunday, in creasing her total hours to 18. How do you make this adjustment? What would you do if Dr. Lafferty informed you of this situation on Tuesday?

Helpful Tip: Pressing the [Ctrl] and [Enter] keys simultaneously moves your cursor to the next line.

On-Line Time Reporting

Following are the time sheets that have been turned in to you from your respective supervisors for **Exception Employees**. Please process the payroll for each employee according to the information provided on the timesheet.

Business Office:

Last Name	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Total	Notes
Campbell	8:30am-5pm	8:30am-5pm	8:30am-5pm	8:30am-5pm	JUR			37.5 hrs.	Mandatory jury duty on Friday
Rodney	8:30am-5pm	8:30am-5pm	SCH	8:30am-5pm	8:30am-5pm			37.5 hrs.	Son was sick Wed.
Harmon	8am-5pm	8am-5pm	8am-5pm	8am-5pm	8am-5pm			40 hrs.	
Mosca	9am-5pm	9am-5pm	9am-5pm	9am-5pm	9am-5pm	9am-5pm		42 hrs.	Object code 5112
Signature: Leslie Tyler 07/05/xx					Week Ending: 07/08/xx				

- Object codes 5112 and 5113 should be substituted for 5110 and 5111 respectively to record OTS and/or OTP.
- The recommended way to perform a Distribution Change (DC) can be found on page 85 in the manual.
- Your dept. BA Barbara Murray informs you on Monday that Mosca only worked until 3pm on Saturday, changing total hours to 40. How will you go about adjusting this entry?

Tip: It is never necessary to mark a "P" in the Action field for process in Exception Time Reporting, it is assumed.

Lafferty Lab:

Last Name	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Total	Notes
Algeo	10am-2pm	2pm-5pm	9am-1pm		2pm-5pm	9am-5pm	9am-5pm	28 hrs.	Worked a flex schedule this week due to exams; has no PTO
Seabury	VAC	8am-5pm	8am-5pm	SCK	8am-5pm	8am-5pm	8am-1pm	52 hrs.	"Worked" only 36 hrs.
Signature: Theresa V. Lafferty 07/05/xx					Week Ending: 07/08/xx				

Monthly Late Pay*

You are informed that Professor MacCarter was never paid for the month ending 08/31/98. The total due is \$14,583.333, and it should be charged to 070-0707-1-000000-5010-1000-9629. MacCarter's SSN = 100278325.

*** Monthly Late Pays require additional approval from someone else in your organization. Weekly Late Pays do not require approvals.**

Payroll/ Personnel Database Questions for Discussion

1. You must hire an employee who **resigned** six months ago. What action should you use?
2. You are notified that an employee's **birth date** is incorrect. What should be done to correct it?
3. You must hire an employee who previously **worked in another department**. What steps should be taken to pay the employee from your department?
4. An employee informs you of **a recent marriage** and would like you to change her name. What action should be taken?
5. You have recently **terminated** an employee. The employee informs you of a change of address. Can you change the address? What steps should be taken?
6. An employee decides to **resign his position** with the University next week. When should you terminate this employee and why?
7. An active employee has recently **moved**. Can you change the address? What action should be used?
8. An employee's **Social Security Number** is incorrect on the Payroll/Personnel System. What steps should be taken to correct it?
9. While reviewing a **reclassification**, you realize that you entered the wrong Class Entry Date. How do you correct this field?
10. You are notified that an employee in your department is **deceased**. What should you do?

University of Pennsylvania
Financial Training Department
Payroll Next Steps

Below are some things to consider on an on-going basis in the course of hiring, maintaining and terminating your faculty and staff members:

- Who are **all of the employees** I am responsible for administering payroll?
- What are my upcoming **cutoff dates** for payroll, for additional pay forms, for time reporting, for database updates?
- Have all of my **positive employees** (Temps, Student Workers, etc.) turned in a timesheet?
- Have all of my **exception employees** turned in a **time sheet** for the sick, vacation, etc. time?
- Do I have need to consider **HOLiday** pay for anyone this pay cycle?
- Does my **new employee** have **minimum record** yet?
- Do I have any **additional pay forms** for which I need a signature(s)?
- Do I see a 'Y' on my **check roster** which means an employee's distribution is ending next week/month?
- Does everyone have **Direct Deposit**?
- Do we keep **undelivered checks/ advices** in a **secure location**?
- Do we have any **stale dated checks**?
- Do I have any 'A'ctive employees who have **not active distributions**?
- Is anyone entitled to 'Late Pay' for this pay period? Have monthly 'Late Pays' been **approved**?
- Is anyone going on **medical leave** or **sabbatical**?
- Am I taking a **vacation day** and need to be sure there is someone to handle **my payroll transactions**?
- Has any **personal data** - address, phone number, marital status of one of my employees **changed** recently?
- Do I have all the **paperwork from the Hiring Officer** for our new employee - Signed Offer Letter, HR 1/2 (if applicable), Provost Staff Conference Minutes, copy of Affirmative Action form, etc.?
- Is a **new employee** joining the department? If so, have they been contacted to let them know what **identification to bring with them** the first day?
- Has someone been **injured on the job**?
- Have I checked to be sure my **temporary workers** have not worked over **1,000 hours**? Over **1,250 hours**?
- If someone is **terminating** has their distribution and status been updated?
- If someone is **terminating** has their supervisor been informed to **retrieve all of their cards**: PennCard, Purchasing Card, TAC, etc.?
- If someone is **terminating**, were they an **Access Administrator, Super User, Building Administrator**, responsible for Petty Cash, etc. or some other critical role to the department?
- Have their **access forms** been **processed** to **remove** their access to BEN Financials, Payroll, etc.?
- Do I know someone in **Payroll** and am I **inviting them** to my next party?