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Information for Faculty

Please take time to review the **Information for Faculty** on the Econ webpage. In order to access this information:

- 1) go to our web: <http://economics.sas.upenn.edu/>
- 2) click on Information for Faculty

Incoming faculty need to wait until they have arrived and have their Penn ID to enter the Info for Faculty website.

Undergraduate Teaching Reminders

The Course Absence Report System (CAR)

This can be found under course absence information.

Canvas

Canvas is the online Learning Management System

If you need help with any aspect of Canvas usage, please e-mail canvas@pobox.upenn.edu. You may also contact John MacDermott with special requests (macderm@sas.upenn.edu). There are many Canvas related sessions (both group and one-on-one office hours) at WIC: <http://wic.library.upenn.edu/wicshops/canvas.html>.

In addition if you are ordering bulk packets for your students through Study.Net please be sure to have them linked to your Canvas Course page.

Please be aware that the first days of class for AY2019 are Tuesday, Aug.28th and Wednesday, Jan. 16th.

Take a Student to Lunch

Faculty can be reimbursed for taking students to lunch; the form is attached. Instructors receive reimbursement by completing a form on the Office of student Life website

<http://www.nso.upenn.edu/take-your-professor-host-your-class-programs>. This form also provides some general guidelines including (a) faculty members will be reimbursed for only one event per semester, (b) the program does not support events for the summer session classes, (c) costs of alcoholic beverages will not be reimbursed, and (d) the program is not for departmental functions.

Required information to turn into the Undergraduate Coordinator

Please give the Undergraduate Coordinator, Emily Romanello, an electronic copy of your syllabus for posting on our website. Please be sure that you indicate on your syllabus **(1) prerequisites; (2) office hours; (3) dates of your midterm exams**. Your assistant or TA should make copies of your syllabus if you plan to distribute a hard copy to students.

Course Hero

Students frequently post course material (homework, homework solutions, exams lecture notes etc) on Course Hero, a note sharing web site.

It is possible to remove material from the site:

- 1) Type or write your name in big friendly letters on every document distributed in class along with a statement that says **the material is not for distribution beyond the class**.
- 2) Have a sentence on the syllabus to the effect that material they obtain is not to be shared with those outside of the class.
- 3) None of this will prevent students from posting to Course Hero; however, it does make it easy to identify on their site (e.g., you can search for econ 101 + vohra).

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4) Find the offending documents and then follow their procedures for having them removed. This is straightforward. Your name on the document establishes you are the copyright holder and the injunction against distribution makes it clear that it should not have been posted. They pull the documents immediately and then give the individual who submitted a chance to challenge.

5) All material will be removed.....at least on Course Hero. Who knows about the others. However, after typing your course # on google, you should not find any **non Course Hero** site that contained the same items even on the 4th search page. However, one does need to check the site periodically!

Proctoring of Exams

The department will provide additional proctors for midterm and final exams for any course section (not including Econ 101 thru Econ 104) that has 40 or more students enrolled. Please note that these proctors are ***in addition*** to your TAs assigned to the course. It is the duty of the TA to be there to proctor an exam. This is ***their first priority*** and if there is a class conflict, workshop, etc., they are to skip and proctor your exam. If for some reason, there is a truly legitimate reason they cannot be there, they must inform you, Gina Conway (Graduate Coordinator), and Emily Romanello (Undergraduate Coordinator), and they should find a replacement and inform Emily of that replacement.

To date, the following courses and sections for **Fall 2018** will have additional proctoring:

Econ 13	Econ 236
Econ 212	Econ 244
Econ 224	Econ 246
Econ 231	Econ 252
Econ 235	Econ 271

In order to begin the process of finding proctors please inform Emily of the following information for your courses:

- 1) date of exams (1st midterm, 2nd midterm). Finals will be determined later, but you may indicate whether or not you plan to give a final.
- 2) time of midterm exam (if it is not the full class time Emily will need to know start and stop times)
- 3) if you do not plan to give midterms and give quizzes, Emily will need to know all quiz dates and times.

Typically, within 2 weeks of the start of the semester, Emily will send out the filled proctor positions for those faculty who have given her their exam information. Emily will then send out updated lists as more faculty provide her with details of their exams. As a reminder, it is the *course instructor's* responsibility to inform all parties involved of any date, room or time changes. Proctors will receive payment forms in their mailboxes. If the date or location for any midterm exam is changed, it is imperative the instructor contacts the proctors and Emily to be sure that they are available at the new time.

Best Practices & Policies

Below is a summary of policy/procedure reminders and expense best practices should you have any questions, please feel free to contact Kelly Quinn and/or any of the McNeil Business Office staff members. A list of non-reimbursable items is attached via ccat.sas.upenn.edu/lhas/NonReimbursableItemsPolicy.pdf

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Meal Limits:

The current meal limits are:

- Lunch: \$30.00
- Dinner: \$75.00
- Meals that will exceed the above limits must receive **prior** approval. Please submit approval requests to [**mcneil-bas@sas.upenn.edu**](mailto:mcneil-bas@sas.upenn.edu)

Guest Speaker & Lecturer Guidelines

Please keep these guidelines in mind when booking workshop speakers and events surrounding guest speakers

- Happy hours should occur in separate establishment than the dinner with the guest speaker.
- A list of all guests attended is needed for both happy hour and dinner reimbursements. Please include your attendees (full name if possible) on the back of receipts when turning them in for reimbursements.
- Meals with a guest speaker or lecturer follow the SAS standard meal limits. The cost of these meals should not exceed \$30 per person for lunch or \$75 per person for dinner (including alcohol, taxes and gratuities).

Non-Employee Travel (workshop speakers, special event speakers, guest lecturers)

To reimburse US Citizens / Resident Aliens, the below items are needed including all receipts:

- Guest Travel Reimbursement Worksheet signed by Traveler
- W-9 signed

To reimburse Non-US Citizens / Non-Resident Aliens, the below items are needed:

- Guest Travel Reimbursement Worksheet signed by Traveler
- Foreign National Information Form
- All *original* related travel receipts or e-receipts
- Signed W-8BEN
- Copy of the photo page in their foreign Passport
- Copy of the photo page of their US VISA (unless it's a B-1, B-2, WB or WT type VISA, in which case we need a copy of this stamp located within their Passport)
- Copy of their most recent I-94 form
- If using this PDA-F form to pay this foreign visitor an Honorarium, a Honoraria Eligibility Form is also required.

For more information about paying honoraria and reimbursing travel expenses to Non-Residents Aliens or Foreign Nationals, please visit the following link ccat.sas.upenn.edu/lhbas/FNNRA_Payment.doc

Organizing a special conference or multi-day special event

For special conferences/events on campus in the upcoming year or next year, please let Kelly know the scope of the special event along with the planned dates, so that proper coverage and a special admin conference committee can be created to make your event run smoothly. All admins can assist with special conferences/events. You should keep in mind that we need 8-12 months notice – depending on the size of your event -- to lock in a space for your conference.

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Travel Related Best Practices

Submitting receipts for travel reimbursement

- Please include hard or electronic copy of your *itemized* receipts. This means if you have a hotel folio from your travels you will want the detailed breakdown which lists everything from the nightly rate to the room taxes applied. For meals, you will need the receipt that displays the number of guests and the break down per item ordered (the credit card overview receipt with the total cost for a meal is not enough detail).

Preferred Travel Agencies Should You Decide to Use An Agent (Air and Rail)

- Penn's preferred travel agencies should you decide to use a travel agent for your business travel are: World Travel or Premier Travel: <http://cms.business-services.upenn.edu/penntravel/preferred-vendors/travel-agencies.html>. Penn's travel agency can assist when making travel arrangements for not only faculty, staff, students, but for non-Penn employees (i.e. guest speakers, workshop speakers, etc.). When making travel reservations using the World Travel Online application, please utilize your administrative assistants in Economics who will be sure to complete the applications in the system listing the mcneil-bas@sas.upenn.edu email address. This will ensure that reservations are approved in a timely manner.
- For Amtrak travel arrangements, please be reminded that your departmental administrator can use his University issued purchasing card to pay for Amtrak tickets. When possible, please utilize this method for paying for Amtrak tickets. Amtrak tickets can be changed easily by the traveling party online or at a kiosk should they need to alter their train times for any reason.

Concur:

Faculty have the option to utilize the Econ Admin Team to process receipts on their behalf via Concur in which case an admin assistant is made a delegate for the faculty member and enters in all the details from the travel, including scanning the receipts into the system. Upon completion, the faculty member approves the reimbursement electronically. Alternatively, faculty who wish to use the online system on their own can process their own reimbursements without utilizing a delegate.

- For travel reimbursements submitted by faculty, staff, and students, and guests of the Department please be reminded to submit your travel receipts via the Concur System <http://cms.business-services.upenn.edu/penntravel/> within 10 days after returning from the trip. ***Any travel reimbursements submitted after 182 days of the return date of the trip will not be reimbursed.*** It is extremely important to remind your faculty, staff, students, and visitors of this important time frame.
- Receipts such as conference fees, airline tickets, etc. that are purchased for attending a conference can be submitted for reimbursement prior to attending that conference. You do not have to hold on to a prepaid conference registration receipt until the conference occurs, especially if the conference will be held six months after the date you paid for the conference fee.

Per Diem Meal Policy (Effective 9/1/2015):

- Personal meal reimbursements - University financial policy #2359 was revised in April, 2015 to make clear that personal meals/per diem are only reimbursable if an overnight stay is involved. Enforcement of this policy is ***effective September 1, 2015***. Business meals with a colleague(s) are still reimbursable,

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as long as an appropriate business purpose is provided with the request. Same day commute, out of town meals with business contacts are also reimbursable.

Bank of America Card Approved Uses:

- Travel (airfare, meals, taxis, hotel, etc.)
- University business entertainment (i.e lunch with business guests). SAS Limit for dinner is \$75.00 per person. SAS Limit for lunch is \$30.00 per person.
- Conference fees/Registration
- Professional memberships
- Subscriptions
- Books used for research (tax not reimbursed). To avoid taxes either ask Kelly or Cortni to order books for you using the Department credit card.

If you are interested in applying for a Bank of America card <http://cms.business-services.upenn.edu/penntravel/creditcard.html> be sure to list as your approver Kim Peurifoy.

Car Rentals:

- It is a requirement to take the Driver's safety online training course, available in knowledgelink <http://knowledgelink.upenn.edu/> for those faculty, staff, and students renting cars on behalf of University for business purchase. Failure to take the course could lead to your own personal liability in the event of an accident or loss. This means that if you take and pass the course, and are later involved in an accident in the rented vehicle, the liability falls on the University (insurance). However, if you do not take the online course, the liability falls onto the department, program, or center and/or possibly the individual.
- It is expected that the loss waiver (LDW/CDW) option, supplemental liability coverage, personal accident insurance (PAI), and any other additional insurance options are declined when renting a car for business purposes on domestic travel.

Non-Travel Related

- **Office Supplies:** should be ordered through Office Depot and/or other approved vendors via BEN Buys purchasing system. Please send your requests to the Econ Admin Team to assist in making the purchase on your behalf.
- **Computer Supplies/Software/Hardware:** should be purchased using a Computer Connection requisition. Forms must be tac'd and signed by a business office staff member. Or, these items can also be purchased by purchase order or departmental purchasing card, depending on the amount of the order.
- **Books:** books can be purchased by an admin with our corporate Amazon account (both hard copies and ebooks), from the University Bookstore using University bookstore requisitions. *Reimbursements will be issued, less the sales tax for books purchased at other book stores.*
- **IPAD/Kindle purchases:** before purchasing such items, please write a business justification for the purchase and send it to mcneil-bas@sas.upenn.edu. The request will be reviewed and decision will be communicated to the requester.

Furniture Purchases:

- Please be reminded that all furniture requests and purchases must be approved by SAS Facilities to help ensure the quality of furniture we are purchasing is commercial-grade and will last over time. In order to simplify this process, SAS Facilities has created an online furniture request form on their new website (see attached link) <https://www.sas.upenn.edu/fpo/forms>. Please be reminded that furniture purchases made outside of the above process on any funding source are un-allowable.

Hiring of External Editors, Programmers, Non-Penn Employees, etc.

It is highly recommended before hiring someone from outside of Penn to first speak to Phil Thomas in the Business Office to insure there will be no red tape in processing payments or any additional paperwork necessary in advance of the work being completed.

External Hires (aka Independent Contractors):

- For those who will be hiring non-foreign independent contractors with work performed in the US, please contact the departmental administrator to arrange payment to the independent contractor in advance of the work being done. ***Independent contractors must be paid by University check due to tax related issues. Please do not pay anyone for services with personal funds to later be submitted as a request for reimbursement.*** The Independent contractor must submit the following forms for payment:
 - Invoice, should include invoice date, invoice #, and description of services provided.
 - W9 <http://www.finance.upenn.edu/comptroller/forms/>
 - (if the independent contractor is new to Penn, or if a period of one year has lapsed from the last time of payment to the independent contractor)
- For those who will be hiring foreign independent contractors with work performed outside of the US (this includes students who have recently graduated and returned to their home country and no longer at Penn on a visa), please contact your departmental administrator to arrange payment to the independent contractor.
- This type of independent contractor must submit the following forms for payment:
 - Invoice, should include invoice date, invoice #, and description of services provided
 - Independent Contractor instructions: https://www.hr.upenn.edu/docs/default-source/service-provider-classification/procedural-guide-for-ic-and-le.pdf?sfvrsn=e16e8756_26
 - CFSI Form <http://www.finance.upenn.edu/comptroller/forms/>
 - W-8BEN for an individual
<http://apps.irs.gov/app/picklist/list/formsInstructions.html?value=w-8&criteria=formNumber>
 - W-8BEN-E for a company/organization <http://apps.irs.gov/app/picklist/list/formsInstructions.html?value=w-8&criteria=formNumber>

For independent contractors paid on an outside grant (sponsored project), please see Philip Thomas or Peggy Fendt in the McNeil Business Office, 153 McNeil Bldg, 3718 Locust Walk, about the additional forms needed.

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Faculty	Admin
Adusumilli	Swinton
Agostinelli	Venne
Atal	Venne
Behrman	Swinton
Bohren	Venne
Bossi	White
Burdett	Venne
Cheng	White
Cole	Vatza
Diebold	Swinton
Dillenberger	White
DiTraglia	Swinton
Dovis	Vatza
Duchene	White
Fang	Swinton
Fernandez-Villaverde	White
Gandhi	Venne
Greenwood	Swinton
Krueger	Venne
Liang	White
Luflade	Vatza
Mailath	Venne
Manovskii	Venne
Matthews	Vatza
Mendoza	Tracy
Nevo	Vatza
Ordonez	Swinton
Postlewaite	Venne
Rios-Rull	Venne
Saka	Swinton
Schorfheide	Venne
Shephard	Swinton
Sieg	White
Todd	Swinton
Vohra	White
Yamamoto	Vatza

Please note the Economics Administrative Staff work together as a team therefore we are able to assist with back-up coverage whenever needed. If your assigned admin is ever out unexpectedly we can assist in time sensitive requests simply see Kelly in Suite 150 or email kquinn@sas.upenn.edu for assistance.