

## How to Request/Update BEN Financials eForms

STEP-BY-STEP INSTRUCTIONS	HELPFUL HINTS
Navigate to <b>Penn eForms</b> ( <a href="https://provider.www.upenn.edu/computing/da/eforms/index.html">https://provider.www.upenn.edu/computing/da/eforms/index.html</a> )	<ul style="list-style-type: none"> <li>▪ <b>eForms</b> consist of several sections for <b>Requester Information, Supervisor Action, Form Routing</b>, etc.</li> <li>▪ As the form progresses along its routing paths, various fields will become editable or complete.</li> </ul>
Click the link with the appropriate form to begin your request.	You will be prompted for your PennKey and PennKey password unless you already have a Penn WebLogin session open.
Indicate the <b>Affiliation Type</b> (Employee or Consultant – <i>See #2 on Figure 1</i> ) and the <b>Request Type</b> ( <i>See #3 on Figure 1</i> ) to indicate whether you are requesting a New Logon ID, Delete Logon ID, Change Application Access, or Transfer	<ul style="list-style-type: none"> <li>• Requester information (Name, Title, and contact information is defaulted into the form using Penn ID (<i>See # 1 on Figure 1</i>))</li> <li>• Radio buttons: Employee, Consultant, New Logon ID, Delete Logon ID, Change Application Access, or Transfer</li> <li>• Consultants will be setup with 90 days access. Access Administrators will be contacted every 90 days to either terminate or extend access for the Consultants in their School/Center</li> <li>• If you are initiating a Transfer, you must select the <b>[Transfer]</b> radio button; then select 'Transfer To' or 'Transfer From' from the dropdown list (<i>See #4 on Figure 1 with the highlighted drop down</i>). If you are transferring from one School/Center to another, you will need to fill out two separate BEN eForms ( i.e. Transfer From: 02 School of Arts and Sciences and Transfer To: 06 School of Nursing)</li> </ul>
Identify your <b>Supervisor</b> by PennKey, name, or Penn ID using the <b>[Find Supervisor]</b> button ( <i>See #5 on Figure 1</i> ).	Once completed and submitted by the requester, the form will be routed to the supervisor for review and approval.
Indicate the <b>type of access</b> ( <i>See Figures 1, 2, and 3</i> ).	<ul style="list-style-type: none"> <li>• Click the radio buttons under <b>BEN Buys, BEN Balances, BEN Pays</b> or <b>BEN Assets</b> to <b>Add</b> or <b>Remove</b> a responsibility</li> <li>• If you click a radio button in error; click on the <b>[Clear]</b> button next to the responsibility</li> <li>• When selecting most 'Secured' responsibilities, you will get a dropdown list where you may select the <b>Org(s)</b> to which you require access (<i>See highlighted area of Figure 2</i>)</li> <li>• Use the 'Note' section, located under Form Routing (<i>See Figure 4</i>) to <b>request a range of Orgs</b> or to provide additional information regarding the Orgs being requested</li> </ul>
Indicate your acceptance of the confidentiality agreement by checking the <b>"I will abide by this policy"</b> box. ( <i>Figure 3</i> )	<b>REQUIRED!</b>
Click the <b>[Submit]</b> button in the <b>Form Routing</b> section ( <i>See Figure 4</i> ).	<ul style="list-style-type: none"> <li>• The form will be routed to your Supervisor</li> <li>• The form status (visible at the top right corner of the form screen) will change to 'ENROUTE' once the form has been submitted. (<i>See Figure 5</i>)</li> </ul>

# How to Request/Update BEN Financials eForms

Figure 1, top of the online eForm for BEN Financials access.

**Requester Information**

*This form must be completed by the person requesting access to the system. If you are requesting access on behalf of their former employee. **Note to Supervisors:** To initiate a request on behalf of another person, you must first select the person on behalf of whom you are initiating your request. Fields with an asterisk (\*) are required.*

**#1** -- Requester information (Name, Title, and contact information) is defaulted into the form using Penn ID.

**#2** -- Select the Affiliation Type.

**#3** -- Select the appropriate Request type.

**#4** -- Note that when the [Transfer] radio button is clicked, the additional fields of Transfer To and Transfer From appear.

**#5** -- Identify your Supervisor by PennKey, name, or Penn ID using the [Find Supervisor] button.

On behalf of Penn ID\*

On behalf of\* (auto filled from above) Janet C. Smith (smithjc, 10051662) (active) Service Provider - Isc-Ait (also: Alumni)

Affiliation Type\*  Employee  Consultant

Request\*  New Logon ID  Delete Logon ID  Change Application Access  Transfer

Transfer To

Transfer From

Department\*

PennKey smithjc E-Mail Address smithjc@upenn.edu

Supervisor Penn ID\*

Supervisor Name\* (auto filled from above) Janet C. Smith (smithjc, 10051662) (active) Service Provider - Isc-Ait (also: Alumni)

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**Requested Access-BEN Buys**

PO Manager  Add  Remove  Clear (Includes Requisitioner Responsibility)

Dollar Limit Approval Authority \$\*

*If PO Manager responsibility is being deleted, please provide a user name to which purchasing alerts will be sent*

User Name

Requisitioner  Add  Remove  Clear

Default Approver Penn ID\*

# How to Request/Update BEN Financials eForms

Figure 2, mid section of the online eForm for BEN Financials access.

**Requested Access-BEN Balances:**

- Journal Entry - General**  Add  Remove  Clear
- Journal Entry - Cash**  Add  Remove  Clear
- Journal Entry - Special**  Add  Remove  Clear
- Journal Entry - G&C Cost Transfers**  Add  Remove  Clear
- Maintain C-Ref Values (Secured)**  Add  Remove  Clear
- Senior BA Reporting (Unsecured)**  Add  Remove  Clear
- Budget Entry (Secured)**  Add  Remove  Change Org List  Clear

For most 'Secured' responsibilities, when clicking the [Add] or [Change Org List] buttons, a drop down (highlighted here) appears so that you can fill in a variety of ranges if necessary.

Center #\*

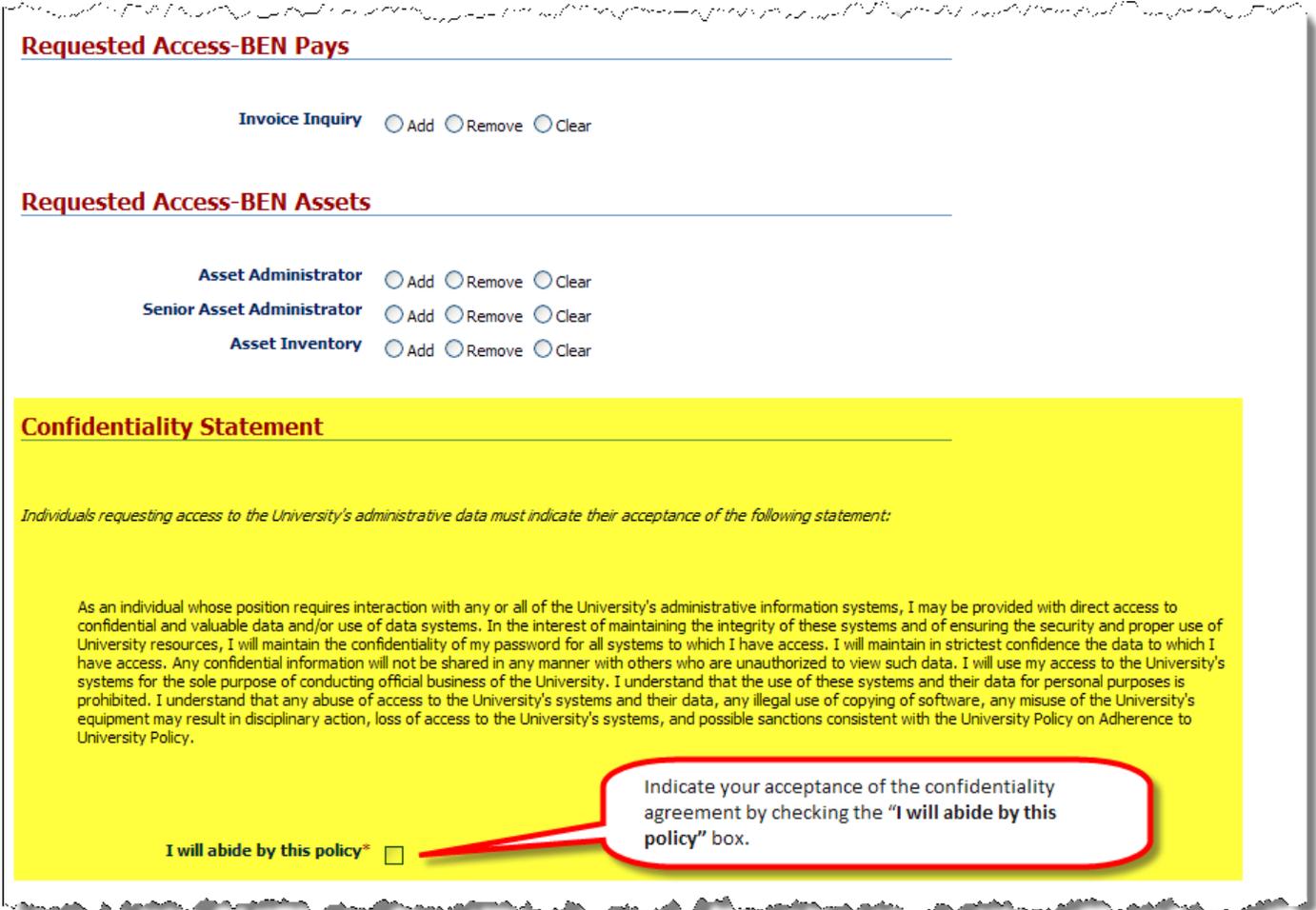
*For secured functions, complete the following:  
List all Organizations to which requestor should have access. To provide additional information, please use the "Notes" section located under the heading "Form Routing".*

Org*	<input type="text"/>	<input type="button" value="Find org"/>	<input type="button" value="Clear"/>	<input type="radio"/> Add	<input type="radio"/> Remove	
Org	<input type="text"/>	<input type="button" value="Find org"/>	<input type="button" value="Clear"/>	<input type="radio"/> Add	<input type="radio"/> Remove	
Org	<input type="text"/>	<input type="button" value="Find org"/>	<input type="button" value="Clear"/>	<input type="radio"/> Add	<input type="radio"/> Remove	
Org	<input type="text"/>	<input type="button" value="Find org"/>	<input type="button" value="Clear"/>	<input type="radio"/> Add	<input type="radio"/> Remove	
Org	<input type="text"/>	<input type="button" value="Find org"/>	<input type="button" value="Clear"/>	<input type="radio"/> Add	<input type="radio"/> Remove	
Org	<input type="text"/>	<input type="button" value="Find org"/>	<input type="button" value="Clear"/>	<input type="radio"/> Add	<input type="radio"/> Remove	
Org	<input type="text"/>	<input type="button" value="Find org"/>	<input type="button" value="Clear"/>	<input type="radio"/> Add	<input type="radio"/> Remove	
Org	<input type="text"/>	<input type="button" value="Find org"/>	<input type="button" value="Clear"/>	<input type="radio"/> Add	<input type="radio"/> Remove	
Org	<input type="text"/>	<input type="button" value="Find org"/>	<input type="button" value="Clear"/>	<input type="radio"/> Add	<input type="radio"/> Remove	
Org	<input type="text"/>	<input type="button" value="Find org"/>	<input type="button" value="Clear"/>	<input type="radio"/> Add	<input type="radio"/> Remove	

- GL Inquiry (Secured)**  Add  Remove  Change Org List  Clear
- GL Reporting (Secured)**  Add  Remove  Change Org List  Clear
- Freeze Grant (Secured)**  Add  Remove  Change Org List  Clear
- Freeze/Unfreeze Grant (Secured)**  Add  Remove  Change Org List  Clear

## How to Request/Update BEN Financials eForms

Figure 3, next section of the eForm. Note the Confidentiality Statement that you must agree to in order to gain access to the data.



**Requested Access-BEN Pays**

Invoice Inquiry  Add  Remove  Clear

**Requested Access-BEN Assets**

Asset Administrator  Add  Remove  Clear

Senior Asset Administrator  Add  Remove  Clear

Asset Inventory  Add  Remove  Clear

**Confidentiality Statement**

*Individuals requesting access to the University's administrative data must indicate their acceptance of the following statement:*

As an individual whose position requires interaction with any or all of the University's administrative information systems, I may be provided with direct access to confidential and valuable data and/or use of data systems. In the interest of maintaining the integrity of these systems and of ensuring the security and proper use of University resources, I will maintain the confidentiality of my password for all systems to which I have access. I will maintain in strictest confidence the data to which I have access. Any confidential information will not be shared in any manner with others who are unauthorized to view such data. I will use my access to the University's systems for the sole purpose of conducting official business of the University. I understand that the use of these systems and their data for personal purposes is prohibited. I understand that any abuse of access to the University's systems and their data, any illegal use of copying of software, any misuse of the University's equipment may result in disciplinary action, loss of access to the University's systems, and possible sanctions consistent with the University Policy on Adherence to University Policy.

I will abide by this policy\*

Indicate your acceptance of the confidentiality agreement by checking the "I will abide by this policy" box.

# How to Request/Update BEN Financials eForms

Figure 4, bottom section of the online eForm.

**Supervisor Action**

*For Supervisor use only. Please select the appropriate School/Center Access Administrator from the list.*

School/Center Access Administrator\*

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**Form Routing**

*To add a comment to your request or approval action, enter it in the Note field provided and click the **save** button. Click the appropriate button (**submit**, **approve**, **disapprove**, etc.) to submit the form for continued processing in the workflow.*

Create Note			
Author	Date	Note	Action
Janet C. Smith (smithjc, 10051662) (active) Service Provider - Isc-Ait (also: Alumni)	02/08/2012	<input type="text"/>	save

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**Implementation Notes**

*For internal Financial use only. The following implementation notes apply to this form.*

Training Requirement(s) have been\*  See Training Notes below

Training Notes

ID Assigned (PennKey)

Finally, click the **[Submit]** button. The form will be routed to your Supervisor and the form status (visible at the top right corner of the form screen) will change to 'ENROUTE' once the form has been submitted.

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**Contact Information**

Financial Systems  
 BEN Helps 6-HELP or 215-746-4357

Form template last revised 11/15/2010

If you wish to include a comment as you submit the form, enter it in this **Note** area in the **Form Routing** section and click the **[save]** button.

Figure 5, form status (visible at the top right corner of the form screen) Changes to 'ENROUTE' when the form is submitted.

Form name:	BEN Financials Access Request Form
Form status:	ENROUTE
Create date:	12:08 PM 02/08/2012
Document ID:	8896