

## *Highlights and Hot Topics*

### **University Payroll and Benefits Service Center (UPB)**

University Payroll and Benefits Service Center (UPB) is the new unit name that will be shared by Payroll and Benefits staff at all campuses. The Student Insurance Office at Urbana is also a division of the UPB organization, but will maintain its current name to be separately identifiable for students. These departments have been collectively working towards a merger that includes the combining of employees on all three campuses (Urbana, Chicago and Springfield). "Change is the law of life", John F. Kennedy once said, and nothing could be truer for the employees of the new UPB Service Center, who are not only experiencing all the changes taking place within these departments, but who are also involved in the decision making process of what the new unit will look and "feel" like. With this level of total staff involvement, the merger is expected to be a success that will enhance both customer service and the UPB staff work environment.

The staff's focus has been on the future for many months now, with everyone involved in space planning, cross training and process review and development. These preliminary efforts are laying the groundwork to ensure a smooth transition for UPB staff and their customers during the initial weeks surrounding the moves. The combining of offices is a significant step toward a goal of improving customer service and satisfaction through consolidated services which focus on the needs of the campus communities. By merging these services, faculty, staff and students will get answers to their benefits, insurance and payroll questions at a single location. The merged offices should reduce customer confusion on which department they should contact to seek assistance.

On June 19, Springfield was the first campus of the three to complete the merger/relocation process. The successful accomplishment of this task has allowed our Springfield UPB staff to provide valuable insights to staff at the Urbana and Chicago campuses as they prepare for their upcoming moves. With a plan for merging all Urbana UPB staff on the first floor of the Henry Administration Building during the Fall 2009 semester, Urbana will be the next location to complete the merger process. Chicago is also progressing nicely with merger activities, with move plans still under development and review. Additional information will be shared as it becomes available.

We are very pleased to announce that as a result of this departmental merger, this will be the final "University Payroll Newsletter". All further issues will be titled "University Payroll and Benefits Newsletter". We look forward to providing service to the University as one department, the University Payroll and Benefits Service Center.

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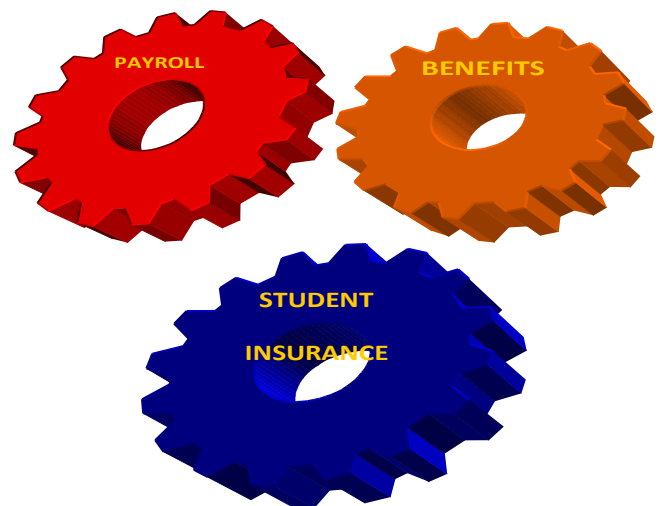
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# Year-End Information

By Sandra Hester

With the end of year quickly approaching, University Payroll would like to highlight important information including dates for all units and employees to take note of.

## 2009 BW 23 Pay date

Because of the Veterans Day bank holiday, payday will be Tuesday, November 10 as opposed to Wednesday, November 11.

## Holiday Payroll Schedule:

### Thanksgiving Week

#### *Adjustment Calc*

With the shortened week due to the Thanksgiving Holiday, all prior pay period adjustments will be paid on Wednesday, November 25. Therefore the deadline to submit these adjustments will be noon on Friday, November 20. All paper checks will be mailed to the employee's Campus Address on November 25.

#### *2009 BW 24 Pay Day*

Pay Day is November 25. All paper checks will be delivered to the employee's Campus Address on this day.

### Year-End Holiday Break

#### *Adjustment Calc*

With the shortened week due to the Holiday Break, all prior pay period adjustments will be paid on Wednesday, December 23. Therefore the deadline to submit these adjustments will be noon on Friday, December 18. All paper checks will be delivered to the employee's Campus Address on December 23.

This will be the last adjustment calc for Calendar Year 2009, please ensure all adjustment payments needing to be paid in 2009, are submitted by the December 18 deadline.

#### *BW26 Pay Day*

Pay Day is December 23. All paper checks will be delivered to the employee's Campus Address on this day.

#### *BW1 Calc*

Department approvers will have until noon on December 23 for timesheet approval. Superusers will also have until 5:00 p.m. on December 23. Current pay period adjustments can be submitted through ANA until 5:00 p.m. on Monday, December 28. All other calc deadlines pertaining to units will remain the same.

There will be **NO** adjustment calc the week of December 28.

#### *Adjustment Calc*

All prior pay period adjustments submitted by noon on Tuesday, January 5, will be paid on Friday, January 8.

## Calendar Year 2009 Taxable Benefits:

All taxable benefit reporting for CY 2009 must be submitted to Payroll by close of business Friday, November 13 to ensure proper reporting on the W-2. These benefits include the taxable amounts relating to the personal use of employer provided vehicles, country club dues paid for members on behalf of the University, qualified moving expenses, complimentary athletic event tickets, car mileage (value of fuel for personal commuting use of an University vehicle), gifts, per diem amounts reimbursed to employee exceeding the IRS limits, expense reimbursements (greater than 60 days), non-qualified moving expenses, non-qualified taxable benefits (value of benefits supplied to a domestic partner of an employee), tuition waiver amounts greater than \$5250, miscellaneous taxable benefits, and nonresident housing expense.

## Calendar Year 2009 Overpayment Processing:

To facilitate effective payroll adjustment processing for the 2009 year end, all adjustment requests related to overpayments need to be submitted to University Payroll by Tuesday, December 1. Employee repayments due to overpaid wages or salaries need to be received in Payroll Customer Service by Tuesday, December 15 to facilitate correction of payroll records. In addition, any paper payroll checks that have not been distributed to an employee should be returned to payroll by this date. Any ANA Overpayment request or employee repayment received after these deadlines may result in delayed processing and may not be reflected on the 2009 W-2 tax statement.

Significant tax consequences on behalf of the employee could occur as a result of the delayed processing.

Should processing be delayed due to units submitting ANA Overpayment requests after the December 1 deadline, the employee's 2009 W-2 will report earnings higher than the employee should have received. The employee will then be required to pay taxes based on this reported amount when filing 2009 taxes.

Employees with repayments processed in 2010 for a 2009 overpayment will be required to file and pay taxes on the entire amount received and reported on the 2009 W-2. A tax letter will be issued to the employee indicating the amount of earnings that can be adjusted. This letter can be used when filing their tax return. Employees who have questions regarding their personal income tax return or the tax letter should seek tax advice from a tax professional.

For more information on Payroll Processing, refer to the Transaction Processing section of the Payroll and Earnings site or Business and Financial Policies and Procedures, Section 4, Payroll found on the OBFS website, <http://www.obfs.uillinois.edu/>. If you have questions about University Payroll processing, please contact the Payroll Customer Service Center at Chicago 312-996-7200, Urbana 217-265-6363, Springfield 217-206-7211 or [payinq@uillinois.edu](mailto:payinq@uillinois.edu).

## National Payroll Week Winner!



*Robin Bryant*

University Payroll spent Tuesday, September 8 celebrating National Payroll Week (NPW) on each campus. Volunteers from the Payroll staff set up tables in various locations in an effort to allow the campus to take part in the celebration and make them aware of the electronic services University Payroll has to offer.

- \*Direct Deposit
- \*Electronic earnings statements
- \*W-2 consent
- \*Address updates
- \*W-4 changes

\*These services also assisted us in promoting “going green” and becoming a paperless society.

In preparation for the NPW event, University Payroll held a contest for their employees seeking the best design of a NPW poster that was to be displayed at each location. The winner of the contest was Robin Bryant, a 5 year veteran within the Payroll Department working as a Payroll Processor. Her design captured all the elements of celebrating NPW while incorporating the electronic services the University offers and the promotion of “going green”.

### *Foreign National Lab Dates for October, November and December*

**Foreign National Mass Appointment labs for status review of new employees and for current employee renewals are listed at the lab registration site.**

<http://training.obfs.uillinois.edu/index.cfm?campus=F>

## Customer Service Metrics

### July – August 2009

	July	August	September
Closed Cases	2219	2016	1539

Total Closed represents the number of Unicenter cases resolved by Payroll Customer Service during the specified month.

## Payroll Operations Metrics

During the last quarter, a total of **311** timesheets fell into an error status at Disposition **05** and had to be manually fixed by Payroll Operations. This error occurs when an employee’s required statutory deductions are not active or do not exist during the pay period

## Adjustments Processed

### July – September 2009

July	August	September
5080	3641	5422

## Payroll Training Events Now Open for Registration

### UIUC

#### *Payments to Foreign Nationals Overview*

November 12, 2009 – 1:00 p.m. to 4:00 p.m.

### UIS

*There are no classes listed at this time.*

# Important Payroll Dates

## Payroll Training Events Now Open for Registration

### UIC

#### Payments to Foreign Nationals Overview

November 3, 2009 – 1:00 p.m. to 4:00 p.m.

#### One Time Payments, HRPPR135

December 9, 2009 – 11:00 a.m. to 12:30 p.m.

#### Labor Redistributions, HRPPR130

December 9, 2009 - 9:00 a.m. to 10:30 p.m.

#### Department Time Entry, HRPTA105

November 17, 2009 – 1:00 p.m. to 4:00 p.m.

#### Payroll Adjustment Processing for Units, HRPPR120

November 17, 2009 – 9:00 a.m. to 12:00 p.m.

For further information on the Payroll courses or to register for a class, please visit the [OBFS Training Center](#).

## Foreign Nationals Renewing Tax Treaty Benefits for 2010 Tax Year

By Emily Lange

Employees who receive tax treaty benefits on their payroll checks are required to complete a Tax Status Review Appointment each tax year. These appointments are considered renewal appointments, and can be completed any time after November 1, 2009. Although tax treaties may allow for several years of benefits, the IRS procedures require tax treaty benefits to be extended for only one tax year at a time. Therefore the 2009 tax treaty benefits expire December 31.

Employees on the Chicago and Urbana campuses can schedule renewal appointments using the Foreign National Tax Status Review Appointment web site:

<http://training.obfs.uillinois.edu/index.cfm?campus=F>, or by contacting Payroll Customer Service. Those employees needing to schedule a renewal appointment at the Springfield campus can either visit our office at BSB 85, or contact Payroll Customer Service.

University Payroll Customer Service can be contacted by e-mailing us at [payinq@uillinois.edu](mailto:payinq@uillinois.edu). University Payroll Customer Service can be contacted via phone Monday through Friday, 9:00 am to 4:30 pm. On the Chicago campus, please call 312-996-7200, on the Urbana campus dial 217-265-6363, and on the Springfield campus dial 217-206-7211.

# Important Payroll Dates

October 15, 2009	MN10 Pay date
October 16, 2009	University Payroll Closed (Banner 8 Upgrade)
November 10, 2009	BW 23 Pay date
November 13, 2009	Reporting of Taxable Benefits to Payroll
November 20, 2009, Noon	Adjustments Approved
November 25, 2009	Adjustments Paid
December 1, 2009	Overpayment adjustments for 2009 due date
December 15, 2009	Employee repayments due to overpaid wages
	Paper checks that have not been distribute to employee should be returned to payroll
December 18, 2009, Noon	Approved Adjustments due
December 23, 2009	Adjustments Paid
	BW 26 Pay Date
December 23, 2009, Noon	BW 1 2010 Time Approval due
December 23, 2009, 5:00pm	Superusers deadline
December 28, 2009, 5:00pm	BW 1 2010 Current pay period adjustments due
January 5, 2010, noon	Adjustments Approved
January 8, 2010	Adjustments Paid



**Q:** How and when can I obtain my W-2 for 2009?

**A:** The University of Illinois offers the convenience of electronic W-2s. You can consent to receive your W-2 electronically by going to the [NESSIE](#) website. Employees who consent to receive their W-2 electronically will access it at their convenience via the NESSIE website. This year the electronic W-2 will become available no later than Friday, January 15, 2010. If you haven't consented by then it's not too late; **consent will remain open through January 17, 2010, only until 10:59 p.m. Central Time.**

Printed paper W-2 forms will be mailed on January 31, 2010, to employees who **DO NOT** consent to receive their W-2 electronically by January 17, 2010, by 10:59 p.m. CT.

**Q:** How can I get a duplicate copy of my W-2?

**A:** To request a duplicate copy of your W-2, please call our W-2 vendor, JAT at 866-923- 6767 after February 12, 2010. Employees can also access a duplicate W-2 electronically through NESSIE after February 12, 2010, even if they have not consented to receiving the original W-2 electronically.

**Q:** Is an electronic W-2 a legal document?

**A:** Yes, the Internal Revenue Service has approved the use of electronic W-2 distribution. However, IRS regulations require that the employees consent to the electronic distribution and the manner of consent must prove the employee has access to receive the W-2 electronically. The University has met this requirement by providing a link within NESSIE where employees can provide this consent. The consent process is open now.

**Q:** What happens after I consent to receive my W-2 online?

**A:** Once the employee submits the information to receive their W-2 online, they will receive an email from JAT Software indicating they have consented to receive their W-2 electronically. University Payroll will send out a notification when your W-2 is available online, and instructions on how to access it.

Employees who have previously consented to receive their W-2 form electronically do not need to do anything to receive their W-2 electronically again this year.

**Q:** If I want to receive my W-2 via mail, why do I need to make sure that my address is up-to-date in NESSIE?

**A:** University Payroll will access the mailing address (MA) listed on the employee's Personal Information tab in [NESSIE](#) to print on the W-2s. If the employee does not have an active mailing address, the W-2 will be sent to the permanent address. If your address is not updated and you are receiving a paper W-2 it may be delayed or returned.

Employees can update both their mailing and permanent address through NESSIE following the instructions on the Employee Address Change Web page. This should be completed by December 31, 2009, for 2009 W-2 purposes.

#### **More Information**

The [Tax Information](#) section of the Payroll and Earnings Web site provides details on how to access the electronic form and about the reissue process. This information also will be communicated through MASSMAIL.

**Q:** I heard that Banner will be down October 16. Isn't that a monthly payday? When will I get paid if I am a monthly paid employee?

**A:** Yes, the university is upgrading to a newer version of Banner. This is a major upgrade and the system will be unavailable Friday, October 16 through Sunday, October 18. The system will be back up and running under the new version on Monday, October 19. Since the system will be down we have moved the payday for monthly paid employees up one day. Payday will be Thursday October 15. To accommodate time entry for the Biweekly 22 pay period, we have moved the payroll calculation as well. Time entry for Biweekly 22 will be due on Wednesday, October 21 at noon, and superusers have until 5:00 p.m. to submit/approve any late timesheets.