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Important Year-End Deadlines

With the end of year quickly approaching, University Payroll and Benefits would like to highlight important information including year-end deadlines for all units and employees.

Thanksgiving Week

**BW 24 2018 Calculation Deadlines**

*Please pay special attention to BW 24 2018 pay calculation deadlines moved up due to the Thanksgiving holiday.*

Time entry for employees and department timekeepers (originators) will end at 12 noon, Monday, Nov. 19. Department approvers have until 3 p.m., Monday, Nov. 19 for timesheet approval. Superusers have until 5 p.m., Monday, Nov. 19 for additional timesheet edits and approval.

Feeder files are due by 5 p.m. on Monday, Nov. 19.

Current pay adjustments can be submitted through the Payroll Adjustment Request Interface System (PARIS) until 10 a.m., Tuesday, Nov. 20.

All other calculation deadlines for BW 24 2018 pertaining to units will remain the same.

BW 24 2018 pay day is Wednesday, Nov. 28.

**Adjustment Calculations with Pay Date of Nov. 23**
The deadline for approving all prior pay period adjustments (PUAs) in the Payroll Adjustment Request Interface System (PARIS) will be moved up to 12 noon, Thursday, Nov. 15, and will be paid on Friday, Nov. 23.

Any prior pay adjustments approved after 12 noon, Thursday, Nov. 15, and before 12 noon, Tuesday, Nov. 27, will be paid on Friday, Nov. 30.

**Reduced Holiday Service Schedule**

**Adjustment Calculations with Pay Date of Dec. 21**
The week before the holiday reduced service schedule, the deadline for approving all prior pay period adjustments (PUAs) in the Payroll Adjustment Request Interface System (PARIS) will be moved up to 12 noon, Friday, Dec 14. Adjustment pay date will be Friday, Dec. 21.

*Continued on Page 2...*
This will be the last adjustment calculation for calendar year 2018. Please ensure that all prior pay period adjustments needing to be paid in 2018 are submitted by the 12 noon, Dec. 14, deadline.

**BW 26 2018 Calculation Deadlines**

Feeder files are due by 9 p.m., Monday, Dec. 17. Department approvers have until 12 noon, Tuesday, Dec. 18, for timesheet approval. Superusers have until 5 p.m., Tuesday, Dec. 18, for additional timesheet edits and approval. Current pay adjustments can be submitted through the Payroll Adjustment Request Interface System (PARIS) until 10 a.m., Wednesday, Dec. 19.

**BW 26 2018 pay day is Wednesday, Dec. 26.**

**Adjustment Calculations for week of Dec. 24**

There will be NO adjustment calculations scheduled for the week of Dec. 24.

**Adjustment Calculations with Pay Date Jan. 4**

The first adjustment calculations scheduled for 2019 will be paid on Friday, Jan. 4, therefore the deadline to submit prior pay adjustments will be 12 noon, Wednesday, Jan 2.

**BW 1 2019 Calculation Deadlines**

*Please pay special attention to BW 1 2019 Pay Calculation Deadlines due to the Reduced Holiday Service Schedule.*

Feeder files are due by 5 p.m., Wednesday, Jan. 2.

Time entry for employees and department timekeepers (originators) will end at 12 noon, Wednesday, Jan. 2. Department approvers have until 3 p.m., Wednesday, Jan. 2, for timesheet approval. Superusers have until 5 p.m., Wednesday, Jan. 2, for additional timesheet edits and approval.

Current pay adjustments can be submitted through the Payroll Adjustment Request Interface System (PARIS) until 10 a.m., Thursday, Jan. 3.

All other BW 1 2019 calculation deadlines pertaining to units will remain the same.

**BW 1 2019 pay day is Wednesday, Jan. 9.**

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**Calendar Year 2018 Overpayment Processing**

The following deadlines must be met to facilitate timely correction of payroll records and avoid significant tax consequences for employees who received overpayments in 2018.

<table>
<thead>
<tr>
<th>Transactions</th>
<th>Deadline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submitting overpayment adjustment requests through the Adjustment Notification Application (ANA).</td>
<td>Must be submitted to University Payroll by 5 p.m., Friday, Nov. 30.</td>
</tr>
<tr>
<td>Submitting employee repayments (money order, cashier’s check, or personal check) due to overpaid wages or salaries.</td>
<td>Must be received in UPB Customer Service by 3 p.m., Friday, Nov. 30.</td>
</tr>
<tr>
<td>Returning paper payroll checks that have not been distributed to an employee.</td>
<td>Must be returned to UPB Customer Service by 3 p.m., Friday, Nov. 30.</td>
</tr>
</tbody>
</table>

If these deadlines are not met, the processing of adjustments will be delayed and may not be reflected on the 2018 W-2 tax statements. Significant tax consequences on behalf of the employee could occur if repayments for 2018 overpayments are delayed and processed in 2018:

- The employee’s 2018 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 2018 taxes.
- Employees will be required to file and pay taxes on the entire amount received and reported on the 2018 W-2.
- Repayment of a prior year overpayment will result in a tax letter being 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.
How Tax Residency Status Affects Benefits Eligibility: J-1, J-2, F-1, F-2 Visas

Employees who have a change in tax residency status from Resident Alien (RA) to Nonresident Alien (NR) effective January 1, 2019, based on the Substantial Presence Test, are no longer eligible to be members of the State Universities Retirement System (SURS).

Only participants in SURS are eligible for state insurance administered by the Illinois Department of Central Management Services (CMS). Employees who lose SURS eligibility will also lose their employee and dependent insurance coverage at midnight on December 31, 2018.

After CMS receives notification of an employee’s termination date, a COBRA Offer Letter and a rate sheet showing the premiums, is sent to the employee’s home address. The COBRA premium includes the employee and state cost plus a 2 percent administrative fee. COBRA will allow a temporary extension to health, dental and vision coverage for an employee and any dependents.

New employees and employees who have a change in tax residency status from Non-resident Alien (NR) to Resident Alien (RA) effective January 1, 2019, must have a job that meets the criteria for benefit eligibility to be eligible for state insurance. CMS allows 30 calendar days from benefit eligibility date to attend a Benefits Orientation Session and submit an election for their State of Illinois health, dental and life insurance. Employees can register for a New Hire Benefits Orientation Session at https://www.obfs.uiillinois.edu/training/registration/.

In most cases, new foreign national employees should be coded as non-benefits eligible. They are informed of benefit eligibility based on the Substantial Presence Test (SPT) determination and the job. An appointment for the SPT can be scheduled by contacting UPB customer service, or online at http://training.obfs.uiillinois.edu/index.cfm?campus=F.

Benefit eligibility is verified when Resident Alien status is updated in Banner. A valid social security number is required for the employee to be entered in the CMS Membership database and to make insurance plan elections.

Foreign national employees are required to have health insurance coverage to maintain their visa status as part of their U of I agreement. Employees who are not eligible for the State Universities Retirement Systems (SURS) are not eligible for State or University insurance benefits.
Are You Retiring or Separating from the University of Illinois System?

The appropriate form(s) must be completed and received by University Payroll and Benefits (UPB) no later than 60 days before your last day of employment. Even if you have an existing 403(b) or 457 account, you must complete and submit these forms to defer your payout.

- If you do not have an active account under one of these plans, then you must open an account to defer your payout. Go to the Systems HR Services website to view plan information and to open a 403(b) and/or 457 Plan account.
- Ask your unit HR contact or business manager to complete and fax to UPB the Unit HR Calculation Worksheet estimating your payout amount. This is required to complete the 403(b) and/or 457 Plan deferral forms below.
- You are encouraged to contact UPB for assistance in completing these forms:
  - 403(b) Plan Deferral – Complete a paper Salary Reduction and/or Redirection Agreement form. The Payout Designation section is at the top of Page 2.
  - 457 Deferred Comp Plan Deferral – Contact UPB to complete the appropriate paper form.
- Submit your completed form(s) to UPB no later than 60 days before your last day of employment.

Verify Your State Benefit Elections and Payroll Deductions

**Personal benefit information**
Verify your benefit elections and personal information at [https://MyBenefits.illinois.gov/](https://MyBenefits.illinois.gov/).
- Remember, your MyBenefits login and password are different than your UIN, NetID, Enterprise ID, or other university logins. For help registering or logging in, see the MyBenefits FAQs.

**Payroll deductions**
Verify payroll deductions on your Earnings Statement.

**Questions?**
Contact University Payroll & Benefits Department:
Email: .......................................................... benefits@uillinois.edu
Urbana-Champaign: ........................................ 217-265-6363
Chicago: .......................................................... 312-996-7200
Springfield: ..................................................... 217-206-7144
Calendar Year 2018 Taxable Benefits

Please make certain all taxable benefits are reported to University Payroll and Benefits at the time the benefits are received by an employee. This will 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, moving expenses, complimentary 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 taxable benefits (value of benefits supplied to a domestic partner of an employee), tuition waiver amounts greater than $5,250, miscellaneous taxable benefits, and nonresident housing expenses.

Please refer to the link below for additional information and instruction related to taxable benefit reporting: http://www.obfs.uillinois.edu/bfpp/section-4-payroll/submit-taxable-fringe-benefit-payments/.

Out-of-State Salary/Wage Payments

If a University of Illinois System employee receives compensation paid in another state, and the system is registered as doing business in that state the compensation is considered paid outside of Illinois. The U of I System is often required to withhold according to that state’s withholding regulations.

Departments and employees should contact University Payroll and Benefits to discuss the necessary steps to ensure proper state withholding.

Please refer to the link below for additional information and instruction related to state tax withholding: https://www.obfs.uillinois.edu/payroll/tax-information/withholding-allowance/.
Supplemental Long Term Disability Plans

Employees may notice a change in their December paychecks for the Prudential LTD deduction. Premiums are calculated annually based on salary and age. As salary changes, the deduction amount may change accordingly. Therefore, an increase in salary may result in an increased deduction amount. A decrease in salary, as with a job change, may result in a decreased deduction amount.

The rate categories are determined by age. Reaching an age in a higher rate category may increase the deduction amount. Premium changes are effective for the period of December 1, 2018 through November 30, 2019.

- **For bi-weekly paid employees:** Any change to University LTD Plan premiums will be effective with the December 12 paycheck.
- **For monthly paid employees:** Any change to University LTD Plan premiums will be effective with the December 14 paycheck.

**Benefit**

The University LTD plan with Prudential is a supplement to the SURS Disability plan. If not enrolled in this plan, your SURS disability benefit is 50 percent for qualifying disabilities. When also enrolled in the University LTD plan the benefit increases to 66.67 percent (50 percent SURS + 16.67 percent University LTD). If there are no disability benefits under SURS, then the University LTD plan benefit is 66.67 percent for qualifying disabilities.

**Questions?**

Additional plan information is available at [Systems HR Services](mailto:). Contact your campus UPB office with any questions.

UPB Customer Service Metrics

**Customer Satisfaction:**

Emails, calls and walk-ins made to University Payroll and Benefits Customer Service Center are tracked using Service Desk Manager Software, TouchPoint Phone System and Microsoft Office. The following is the total number of University Payroll and Benefits (UPB) customer service cases resolved each month between July and September 2018.

<table>
<thead>
<tr>
<th>Month</th>
<th>Cases Closed</th>
</tr>
</thead>
<tbody>
<tr>
<td>July</td>
<td>4,192</td>
</tr>
<tr>
<td>August</td>
<td>4,244</td>
</tr>
<tr>
<td>September</td>
<td>4,022</td>
</tr>
<tr>
<td><strong>TOTAL:</strong></td>
<td><strong>12,458</strong></td>
</tr>
</tbody>
</table>

**Payroll Operations Metrics**

During the third quarter of 2018, there were 54 Disposition 05 errors that had to be manually fixed by UPB Payroll Operations. This error occurs when an employee’s required statutory deductions are not active or do not exist during the pay period.

**Payroll Adjustments Processed:**

The total number of adjustment pay transactions processed by UPB Payroll Operations for the third quarter 2018 is:

<table>
<thead>
<tr>
<th>Month</th>
<th>Adjustment Pay Transactions</th>
</tr>
</thead>
<tbody>
<tr>
<td>July</td>
<td>4,516</td>
</tr>
<tr>
<td>August</td>
<td>4,223</td>
</tr>
<tr>
<td>September</td>
<td>5,114</td>
</tr>
<tr>
<td><strong>TOTAL:</strong></td>
<td><strong>13,853</strong></td>
</tr>
</tbody>
</table>
Payroll Calculation Deadlines

When do I get paid?
The University and Payroll Benefits calendar is available online at [http://www.obfs.uillinois.edu/payroll/schedules](http://www.obfs.uillinois.edu/payroll/schedules).

<table>
<thead>
<tr>
<th>Pay Event</th>
<th>Time Entry Cutoff Noon</th>
<th>Pay Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>BW 21</td>
<td>10/09/2018</td>
<td>10/17/2018</td>
</tr>
<tr>
<td>BW 22*</td>
<td>10/23/2018</td>
<td>10/31/2018</td>
</tr>
<tr>
<td>MN 11</td>
<td>N/A</td>
<td>11/16/2018</td>
</tr>
<tr>
<td>BW 23</td>
<td>11/06/2018</td>
<td>11/14/2018</td>
</tr>
<tr>
<td>BW 24</td>
<td>11/19/2018</td>
<td>11/28/2018</td>
</tr>
<tr>
<td>MN 12</td>
<td>N/A</td>
<td>12/14/2018</td>
</tr>
<tr>
<td>BW 25</td>
<td>12/04/2018</td>
<td>12/12/2018</td>
</tr>
<tr>
<td>BW 26</td>
<td>12/18/2018</td>
<td>12/26/2018</td>
</tr>
</tbody>
</table>

* Denotes no voluntary deductions taken

UPB Foreign National Tax Status Review Appointments

Chicago
December 6, 12, 18, 19, 20: 9:30 - 11 a.m., 11:30 a.m. - 1 p.m., 2 - 3:30 p.m.
January 9, 15, 17, 24, 30: 9:30 - 11 a.m., 11:30 a.m. - 1 p.m., 2 - 3:30 p.m.
February 5, 13, 19, 21, 27: 9:30 - 11 a.m., 11:30 a.m. - 1 p.m., 2 - 3:30 p.m.

Urbana-Champaign
December 3, 4, 10, 11, 17, 20: 9 - 10:30 a.m., 11 a.m. - 12:30 p.m., 1:30 - 3 p.m.
January 8, 10, 14, 16, 17, 24, 28, 30, 31: 9 - 10:30 a.m., 11 a.m. - 12:30 p.m., 1:30 - 3 p.m.
February 4, 7, 11, 13, 19, 21, 25, 28: 9 - 10:30 a.m., 11 a.m. - 12:30 p.m., 1:30 - 3 p.m.

NOTE: The Urbana-Champaign appointments have been permanently relocated to Room 63 in the basement of Henry Administration Building.

For updates or changes to the Foreign National Mass Appointment Lab offerings, please refer to the registration site at [http://training.obfs.uillinois.edu/index.cfm?campus=F](http://training.obfs.uillinois.edu/index.cfm?campus=F).
Q: I am going on a leave, what do I do?
A: Please review the leave information on the System Human Resources Services website: https://www.hr.uillinois.edu/leave. For further questions please contact UPB.

Q: Should I fill out a Leave of Absence Worksheet prior to going on leave?
A: The Leave of Absence Worksheet provides you necessary information and options during your leave. As well as, providing UPB on what you would like to do with your insurance while on leave. The Leave of Absence Information and Form are available at: https://www.hr.uillinois.edu/leave/forms/.

Please submit the LOA worksheet to: obfsupbfiscalcontrol@uillinois.edu.

Q: When I return to work, is there anything I need to do?
A: You may contact our office to let us know that you have returned to work. However, we are unable to update any information of your return until your department updates necessary forms in Banner.

Next, please log in or call MyBenefits to confirm that your coverage is correct. If you Opted Out of your insurance or terminated for non-pay while on leave you will need to re-enroll yourself and any dependents. You will have 60 days from the date you return to work to make any changes or re-enroll. MyBenefits is located at www.MyBenefits.illinois.gov or by calling 1-844-251-1777.

Q: Who do I contact about my benefits if I am going on leave?
A: Please contact University Payroll & Benefits – Fiscal Control and Management Group for questions about benefits while on leave.
   a. Email: obfsupbfiscalcontrol@uillinois.edu
   b. Call: select “Leave of Absence Questions”
      • Urbana-Champaign: (217) 265-6363
      • Chicago: (312) 996-7200
      • Springfield: (217) 206-7144

Q: How do I pay for my benefits while on leave?
A: Monthly billing statements are mailed by CMS/MyBenefits to employees’ mailing addresses on file. Please update your mailing address on the System Human Resources website – My UI Info Tab, My Profile: https://www.hr.uillinois.edu/cms/One.aspx?portalId=4292&pageId=858105.