Vacation and Sick Leave Reporting for Academic and Civil Service Exempt Employees

By Jami Painter, Human Resources

The University implemented a new Exempt Leave Reporting Policy for both Academic and Civil Service exempt employees, that is, those who are not eligible for overtime, on 8/16/06 for Academics and 8/27/06 for exempt Civil Service employees. This policy states that all exempt Academic and Civil Service employees who are not eligible for overtime should be reporting absences in half- and full-day increments only (except when leave is taken under the FMLA or VESSA). Absences in increments less than half- or full-days should not be charged against vacation or sick leave balances.

As an example, a full-time exempt Academic Professional (40 hour workweek) would report absences in four (4) and eight (8) hour increments. A full-time exempt Civil Service employee on a 37.5 hour workweek would report absences in 3.75 and 7.5 hour increments. Part-time and alternative schedule employees report absences as appropriate based on their appointment.

Generally speaking, the employee reports either half-day or a full-day equivalent to the value of their “normal” day.

Specific provisions regarding exempt reporting include:

- Only half- and full-day absences are recorded as usage against vacation and sick leave time.
- Accumulation of leave time to reach half- or full-day increments is not allowed.
- An exempt employee’s pay will not be reduced if sufficient accrued leave benefits are not available to cover the leave.
- Unit processes and guidelines for requesting and approving absences must be followed.

Specific information regarding exempt leave reporting may be found in DART at https://hrnet.uibr.uillinois.edu/dart-cf/index.cfm?Item_id=2754.

If you have any questions regarding Academic leave reporting, please contact your campus Academic Human Resources office.

UIC: (312) 413-4848 or UIC (Faculty) (312) 355-2412
UIS: (217) 206-6616
UIUC: (217) 333-6747
UA: (217) 333-2600

If you have any questions regarding Civil Service leave reporting, please contact your campus Human Resources office for Civil Service staff.

UIC: (312) 413-4848
UIS: (217) 206-7096
UIUC: (217) 265-5620
UA: (217) 333-2600
Consent to Receive an Electronic W-2 for 2006

By Deb Moreton

Last year, over 15,000 University employees consented to receive their W-2 electronically. By consenting to receive an electronic W-2, these employees had access to their W-2 at least two weeks earlier than their coworkers. This year the electronic W-2 will be available on January 12, 2007. Paper W-2 forms will be mailed to the rest of the employee population on January 31, 2007.

Employees who consent to receive their W-2 electronically can access it at their convenience and need not worry that the W-2 will be lost in the mail. Even if the employee misplaces the printed copy of the electronic W-2, he or she can retrieve a duplicate.

Some have asked whether or not a W-2 retrieved electronically is a legal document. The Internal Revenue Service has approved the use of electronic W-2 distribution. However, IRS regulations require that 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.

You may consent using the following steps:

1. Go to Nessie
2. Select the Compensation tab.
3. Click the link W-2 Wage and Tax Statement.
4. Click the link W-2 Consent form.
5. Log in using your Bluestem logon and password.
6. Enter your Personal Identification Number (PIN) or create one.
7. Once you are on the W-2 Wage and Tax Statement Consent Form page, click continue, which will take you to the online consent form on the JAT Web site.

8. Follow the instructions at the bottom of the form to provide consent (identify your employer as University of Illinois and give your UIN as the Logon ID).

Once the employee submits the information, they will receive an e-mail from JAT Software indicating they have consented to receive their W-2 electronically. During the second week in January, University Payroll will send out a notification that their W-2 is available online, and instructions on how to access it.

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

Printed W-2 forms will be mailed on January 31, 2007 to employees who DO NOT consent to receive their W-2 electronically by January 18, 2007.

Mailing Process

JAT Software will do the annual mailing of W-2 and 1042-S (for Foreign National employees) forms. The W-2 will be mailed to the mailing address (MA) listed on the employee’s Personal Information tab in NESSIE. If the employee does not have an active mailing address, the W-2 will be sent to the permanent address.

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, 2006 for 2006 W-2 purposes.

If employees do not receive their W-2 in the mail, they can request a duplicate copy by calling our W-2 vendor, JAT at (866) 923-6767 after February 7, 2006. Employees can also access a duplicate W-2 electronically through NESSIE after February 7, 2006 even if they have not consented to receiving their original W-2 electronically.

More Information

The Tax Information section of the Payroll & Earnings Web site provides details on how to access the electronic form and about the reissue process.
Customer Service Metrics
August – October 2006

<table>
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<tr>
<th></th>
<th>August</th>
<th>September</th>
<th>October</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Activity</td>
<td>2,683</td>
<td>2,719</td>
<td>2,420</td>
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<tr>
<td>Pending Resolution</td>
<td>4</td>
<td>13</td>
<td>51</td>
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<tr>
<td>Closed</td>
<td>2,573</td>
<td>2,586</td>
<td>2,291</td>
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Payroll Operations Metrics
During the last quarter, a total of 267 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
August – October 2006

<table>
<thead>
<tr>
<th></th>
<th>August</th>
<th>September</th>
<th>October</th>
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<tbody>
<tr>
<td></td>
<td>4,447</td>
<td>4,533</td>
<td>4,154</td>
</tr>
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</table>

Important Payroll Dates

Payroll Training Events
Now Open for Registration
UIUC
Payroll Overview
December 5 – 9:00 a.m. to 12:00 p.m
Payments to Foreign Nationals Overview
December 5 – 1:00 p.m. to 4:00 p.m.
UIUC Town Hall
February 7 – 1:00 p.m. to 5:00 p.m.

UIS
Payroll Overview
December 8 – 1:00 p.m. to 4:00 p.m.
Payments to Foreign Nationals Overview
December 8 – 9:00 a.m. to 12:00 p.m.
UIUC Town Hall
February 8 – 1:00 p.m. to 5:00 p.m.

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

Other Dates
Payroll Calculation deadlines can be found on the posted Payroll Schedule for 2006.

**Thanksgiving Week:**
Payday: Nov. 29 (Wed.)

**Year End holiday break:**
- BW 26 Calc: Dec. 19 (Tues.)
- Timesheet Approvers: Dec. 19 – Noon
- Superusers: Dec. 19 – 5 p.m.
- Direct Deposits Credited: Dec. 27 (Wed.)
- Paper Checks Mailed*: Dec. 26 (Tues.)
- Paper Earnings Statements**: Jan. 2 (Tues.)
- Electronic Earning Stmtts.: Dec 22 (Fri.)
- Adjustments Approved: Dec. 20 (Wed.) – 5 p.m.
- Adjustments Paid: Dec. 22 (Fri.)
- Direct Deposit: Dec. 26 (Tues.)
- Paper Checks: Dec. 26 (Tues.)

* To the mailing address in Banner. If no mailing address exists, the permanent address will be used.

** To the campus address in Banner.

The [Payroll Schedule for 2007](#) is now available on the OBFS Payroll & Earnings website.

Foreign National Mass Appointment labs for status review of new employees and for current employee renewals are listed at the [lab registration site](#).
Questions and Answers

Q: I'm trying to adjust the labor charges across multiple C-FOAPs in PZAREDS and the form won’t let me complete the steps because of a rounding problem with the hours. What can I do to complete this transaction?

A: Occasionally, PZAREDS will encounter a rounding problem with hours, percents or dollar amounts depending on how you adjust the charges across the multiple C-FOAPs. To complete the steps in Edit Labor Distributions, the totals in OLD Earnings Labor Distributions and NEW Earnings Labor Distributions have to match exactly. If hours total 173.33 in the OLD, but 173.34 in the NEW, the transaction will not be successfully completed. In order to proceed, you should select Round Labor Distributions from the Options menu. This function will round the 173.34 in the NEW Earnings Labor Distributions to 173.33.

Q: How will the Holiday schedule affect payroll?

A: Payday will be Wednesday, November 29, 2006.

For the Year End holiday break, BW 26 calc will occur on Tuesday, Dec. 19. Timesheet submitters and approvers have until noon on Dec. 19. Superusers have until 5 p.m. on Dec. 19. Direct deposits will be credited on payday, December 27. Paper checks will be mailed on December 26 to the mailing address in Banner. If no mailing address exists the permanent address will be used.

Paper earnings statements will be mailed to the campus address on January 2, 2007. Electronic earning statements will be available in NESSIE on Friday, December 22.

One adjustment calc is scheduled between Dec. 18 and Dec 30. Adjustments submitted and approved by 5 p.m. on Wednesday, December 20 will be directed deposited on Friday, December 22. Paper checks will be mailed to the mailing address in Banner on Dec. 26. If no mailing address exists the permanent address will be used.

Q: When should I use ANA (Adjustment Notification Application) to submit an adjustment?

A: Currently, ANA is used to submit adjustments for overpayments, current pay periods, and leave balances. It is also used to request pay stops, report taxable benefit and pay employee awards. Please refer to the ANA Guide for step-by-step procedures.

Work has begun on expanding ANA’s functionality, but in the meantime, adjustments for underpaid employees for previous pay periods are still done through PZAADJT and workflow. Expect more information regarding ANA in the future.

URLS:

Foreign National Mass Appointments (lab registration site)
http://training.obfs.uiinois.edu/index.cfm?campus=F

Payments to Foreign National Employees
http://www.obfs.uiinois.edu/obfshome.cfm?level=1&Path=foreign&XMLData=foreign1

Payroll Schedule for 2006
http://www.obfs.uiinois.edu/earnings/2006payrollschedule.xls

Payroll Schedule for 2007
http://www.obfs.uiinois.edu/earnings/2007payrollschedule.xls

OBFS Training Center
http://www.obfs.uiinois.edu/obfshome.cfm?level=1&path=trainin&XMLData=trainin1

Tax Information
http://www.obfs.uiinois.edu/obfshome.cfm?level=2&Path=earnings&XMLData=taxinfo

ANA Guide