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# UNIVERSITY PAYROLL NEWSLETTER

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Volume 3, Issue 4

February 2008

## *Highlights and Hot Topics*

### Earning Statements

By Kassandra Hester

Several years ago, NESSIE <https://nessie.uhr.uillinois.edu/cf/comp/index.cfm> became the University's standard mechanism for notification of employee pay. With this change, most employees began receiving their payroll statements through NESSIE. At that same time, an option was also provided enabling employees to continue receiving printed (paper) payroll earnings statements, for each payroll, delivered through their respective employing unit.

Given the changing information needs of University employees and in an effort to align our processes with a paperless society, University Payroll has updated their policy for providing printed payroll earnings statements. Effective May 1, 2008 an **annual** reaffirmation of the need to receive a paper earnings statement during Benefits Choice time will be required. Individuals currently receiving a paper earnings statement can reaffirm by clicking on the Renew Paper Earnings Statement link located in

NESSIE under Compensation tab then Earnings Statement. Employees that do not have access to a computer can also visit their campus Payroll Service Center to complete the Request for Paper Earnings Statement form during the designated enrollment period of May 1 – 31, 2008. If the employee chooses to do this, the employee would receive paper earnings statement throughout the fiscal year.

After the enrollment period ends, current employees who have not elected to continue receiving paper earnings statement will no longer be allowed to access the link in NESSIE. Any attempt to enter the link will prompt an error message referring them to the Payroll Customer Service Center.

NESSIE provides an efficient and secure method for providing employee payroll information. We encourage everyone to use this as the source for earnings statement information.

Questions or concerns regarding this change in policy can be referred to University Payroll Customer Service at [payinq@uillinois.edu](mailto:payinq@uillinois.edu) or call at Chicago (312) 996-7200, Urbana (217) 265-6363, Springfield (217) 206-7211.

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# Overpayment Process Overhaul

By: Don Smith

In order to make collection of overpaid funds more efficient, as well as address some auditing issues, University Payroll has revised its Overpayment Process, taking into consideration the many helpful suggestions given during the Overpayment Town Halls held last fall. Additional Town Halls were held in February 2008 to discuss the finalization of the Overpayment Process.

### Departmental Acts as Liaison

In addition to submitting the ANA (Adjustment Notification Application), the unit will be responsible to notify the employee of the overpayment at the time the ANA is submitted. A sample letter is available on the Overpayments web page. The unit will also act as liaison between Payroll and the employee, referring the employee to Payroll Customer Service.

### University Payroll Communications

Payroll will now send all Overpayment Notifications to the employee via electronic mail, if available, and US postal mail (to the Mailing, Postal or W2 address in Banner). Units will continue to receive a copy via email. All notifications have been revised and improved.

### Collections

If an overpaid employee holds an active appointment with the University, then payroll will notify the employee and the unit that future pay will be collected in order to satisfy the debt. If the overpayment is more than 20% of the employee's regular pay, the employee will be given 2 weeks to make alternate repayment arrangements with Payroll Customer Service.

Inactive employees will be given 2 weeks to respond to the notification, and if payment or repayment arrangements are not made, then the overpayment will be turned over to USFSCO for collections.

### Repayment Arrangement

Employees will now go directly through Payroll Customer Service to set up repayment arrangements, such as payment with personal funds or setting up voluntary recapture agreement. The unit will no longer initiate repayment arrangements through USFSCO, but will send the employee to Payroll Customer Service to sign a repayment agreement. Units will be informed of the agreement to suggest revisions should the agreement prove to be unsatisfactory.

### Formal Review

If an employee is not in agreement with the details of an overpayment, and cannot come to a satisfactory resolution after speaking to the unit and Payroll Customer Service, then the employee will be allowed to request a formal review or hearing. Within 30 days of receiving a signed request (available through Payroll Customer Service), a meeting will be set up with the employee, the unit, and the Director of Payroll (or designee).

### Web Page Update

The web page located at <http://www.obfs.uillinois.edu/obfshome.cfm?level=2&path=earnings&xmldata=overpayments> has been updated to provide detailed explanations for the Overpayment Process and valuable resources, including a guide for the unit as well as instructions for many specific situations.

Please contact Payroll Customer Service: Chicago (312) 996-7200, Urbana (217) 265-6363, Springfield (217) 206-7211 or [payinq@uillinois.edu](mailto:payinq@uillinois.edu) if you have any questions.



# Short-Term Visitors

By: Melvin Fason

The University of Illinois is one of the destinations of many foreign national short-term visitors to the United States. The purpose of their visits range from observing processes and procedures utilized at the university, to lending their skills in the area of their expertise to the university. Often times, remuneration for services or reimbursement of travel expenses for the visitor is requested by the department that hosted them.

Prior to making a commitment to pay a foreign national, departments should determine if their visitor is in an immigration status that permits the payment to be made without potentially violating that person's status. An aid in helping to make that determination is the Payment Eligibility Grid found on the Office of Business and Financial Service's website <http://www.obfs.uillinois.edu/> under the heading, "Payments to Foreign Nationals".

Equally as important is the visitor's tax status; whether the foreign national is a resident alien or a nonresident alien. The individual's tax status is determined by University Payroll using procedures established by the IRS. Nonresident alien (NRA) taxation and reporting require strict adherence to various government regulations and can be quite complex.

Payments made to, or on behalf of an NRA for services (i.e., lecturing, consulting, or other activities performed for payment under terms and conditions specified in a contract or an honorarium) are viewed by the Internal Revenue Service as being made directly to that individual and must be reported as such. All payments for independent personal services performed by a NRA are subject to a federal withholding rate of 30% as well as the Illinois state rate of 3%.

In order for non-employment service payments to be made to a foreign visitor, the payment request must be submitted on the Foreign National Payment Form along with the required support documentation to University Payroll Customer Service Center for approval and processing.

To prevent delays or rejection of payments to their short-term visitors, the hosting departments should review the information on payments to foreign nationals on the OBFS website as much in advance of the individual's actual visit as possible and become familiar with the basic process. This will help to ensure that all required forms are completed and submitted along with the appropriate

documents when submitting a request. Assistance can also be obtained by contacting 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).

The goal of the hosting department and University Payroll is to make the foreign visitor's stay as pleasant as possible. Efficient and accurate payment in compliance with government regulation and university policies and procedures of monies due is a major factor in achieving that goal.

## *Last Quarter*

### Customer Service Metrics

November 2007- January 2008

	November	December	January
<b>Total Activity</b>	1449	1296	1940
<b>Pending</b>	4	5	101
<b>Resolution Closed</b>	1416	1200	1912

Total Activity represents the number of Clarify cases handled by Payroll Customer Service. Pending resolution refers to the number of cases still open out of those submitted at the end of each month. Closed are resolved issues.

### Payroll Operations Metrics

During the last quarter, a total of 170 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

November 2007- January 2008

November	December	January
4282	3594	3007

# Questions and Answers

**Q:** What is the university process for mailing out W-2's for 2007?

**A:** The University of Illinois has contracted the services of JAT Software for the annual mailing of year-end statement of wages (Form W-2 and Form 1042-S).

FORM W-2 will be mailed to University of Illinois employees January 31<sup>st</sup>, to the "mailing address" listed on their Personal Information tab in NESSIE as of December 31<sup>st</sup>. If the employee does not have an active mailing address, the form will be sent to the employee's home/permanent address. See the [Employee Address Change page](#) for instructions on how to change your mailing address in NESSIE.

FORM 1042-S will be mailed to University of Illinois non-resident foreign national employees by posted date, to the mailing address listed on their Personal Information tab in NESSIE as of December 31<sup>st</sup>. If the employee does not have an active mailing address, the form will be sent to the employee's home/permanent address. See the [Employee Address Change page](#) for instructions on how to change your mailing address in NESSIE.

**Q:** I am an active employee and consented to receive my W-2 online, how do I access the form?

**A:** To access the form employees should follow these steps:

1. Go to [NESSIE](#).
2. Select the **Compensation** tab.
3. Click on the link **W-2 Wage and Tax Statement**.
4. Click on the link **View Your W-2**.
5. Log in using your **Bluestem or Enterprise logon** and **password**.
6. Enter your **Personal Identification Number (PIN)** or create one.
7. Click on the **Continue** button.

9. Enter the last 4 digits of your SSN and click **OK**.

10. Click on the link **Click here for your 2007 W-2 Form**.

11. Your **Form W-2** will display on the screen.

You may print the form, e-mail it to yourself, or save your form to a hard drive, disk or other memory device. You may also log off and retrieve it again later through the same process via NESSIE.

**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. Employees can also access a duplicate W-2 electronically through NESSIE even if they have not consented to receiving the original W-2 electronically.

**Q:** I have questions about my W-2, where can I get more information?

**A:** The [Tax Information](#) section of the Payroll & Earnings Web site provides details on W-2 and 1042-S forms. Or, you can contact the University Payroll Customer Service Center at: Chicago (312) 996-7200 or email [payinq@uillinois.edu](mailto:payinq@uillinois.edu). Furthermore, if you need a reissue of your Form W-2 or Form 1042-S to be mailed

1099 forms? Please contact the University Payroll Customer Service Center at Chicago (312) 996-7200 or email [payinq@uillinois.edu](mailto:payinq@uillinois.edu).

**Q:** How can I get a duplicate copy of my 1099 forms?

**A:** For questions on the 1099 form, please contact University Payables Customer Service at **217-333-6583** or [obfsupay@uillinois.edu](mailto:obfsupay@uillinois.edu).

If you have questions regarding the 1098-T form, please contact University Student Financial Services and Cashier Operations at **312-996-8574**.

# Important Payroll Dates

## Payroll Training Events Now Open for Registration

### UIC

#### Payroll Overview

April 24, 2008	9am-12:00 pm
June 24, 2008	9am-12:00 pm
August 21, 2008	9am-12:00 pm
October 21, 2008	9am-12:00 pm

#### Payments to Foreign Nationals Overview

April 24, 2008	1-4:00 pm
June 24, 2008	1-4:00 pm
August 21, 2008	1-4:00 pm
October 21, 2008	1-4:00 pm

#### Department Time-Entry

May 21, 2008	1-4:00 pm
August 22, 2008	1-4:00 pm
November 11, 2008	1-4:00 pm

### UIUC

#### Payroll Overview

April 8, 2008	9am-12:00 pm
June 19, 2008	9am-12:00 pm
August 19, 2008	9am-12:00 pm
October 9, 2008	9am-12:00 pm

#### Payments to Foreign Nationals Overview

April 8, 2008	1-4:00 pm
June 19, 2008	1-4:00 pm
August 19, 2008	1-4:00 pm
October 9, 2008	1-4:00 pm

#### Department Time-Entry

April 16, 2008	1-4:00 pm
June 8, 2008	1-4:00 pm
September 18, 2008	1-4:00 pm
October 23, 2008	1-4:00 pm

### UIS

No dates scheduled

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

# Other Dates

Payroll Calculation deadlines for 2008

<http://www.obfs.uillinois.edu/obfshome.cfm?level=2&path=earnings&xmldata=payschedules>

## Payroll Customer Service Office Closure

Payroll Customer Service Centers on all three campuses will be closed for internal training and staff development on Friday May 23, 2008. Regular service and business operations will resume at 9 a.m. on Tuesday May 27, 2008.

Calls to the Payroll support lines on May 23, 2008 will be directed to voice mail. To log a Payroll case, send an email to [payinq@uillinois.edu](mailto:payinq@uillinois.edu) to automatically create a Clarify case or use E-Support to create and track the status of your case. Instructions on how to create a case through E-Support can be found in the February 2006 edition of the University Payroll Newsletter.

<http://www.obfs.uillinois.edu/obfshome.cfm?level=2&path=earnings&xmldata=newsletters>

## Register for Foreign National Tax Status Mass Appointment Labs:

### Chicago

News and Renewals:	3/6	9am, 11am, 1:30 pm
	3/18	9am, 11am, 1:30 pm

### Urbana

News:	3/19	8:30am, 10:30am
	3/27	8:30am, 10:30am, 1:30pm
	3/31	8:30am, 10:30am, 1:30pm
Renewals:	3/19	8:30am
	3/27	8:30am, 10:30am, 1:30pm
	3/31	8:30am, 10:30am, 1:30pm

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