

## *Highlights and Hot Topics*

### Form W-2 and Form 1042-S Reissue Process

By Laura Barnett

Reissues of Form W-2 or Form 1042-S\* are now available. Employees who have not received their mailed Form W-2 or Form 1042-S, or who need to replace a lost or misplaced mailed form, may obtain a reissued form by mail (W-2 and 1042-S) or through electronic retrieval (W-2 only).

#### **Mailed Form W-2 or Form 1042-S Reissues**

Employees who wish to receive a reissue of a paper Form W-2 or Form 1042-S may contact the **JAT Reissue Call Center at (866) 923-6767** between the hours of 8:00 a.m. and 8:00 p.m. (Central Standard Time), Monday through Friday to have one mailed to them. A voicemail system will be available after hours. Messages will be retrieved and processed the next business day.

The employee will need to provide the following information:

- Social Security Number

- Password (birth date)
- Contact phone number in case the reissue is returned to JAT
- Mailing address

If an address change is required, a representative at JAT Call Center will change the address on the form and send the reissue to the correct address. This change of address will only be reflected on the reissued form. Employees should correct their address in NESSIE for future mailings.

#### **Electronic Form W-2 Reissues**

Employees who did not consent to receive their Form W-2 electronically may still retrieve an electronic reissue of their Form W-2. To retrieve this electronic reissue:

1. Go to the [W-2 Access page](#) of the Compensation tab in NESSIE.
2. Click on Re-issue Your W-2.
3. Log in using your Bluestem logon password.
4. Enter in your Personal Identification Number (PIN) or create one.
5. Click Continue.
6. Enter last 4 digits of SSN.
7. Click the OK button.
8. Click link to View & Print Your W-2.
9. Your Form W-2 will display on the screen.

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

Reissues of Form 1042-S will not be available electronically.

*\*Some foreign national employees will receive a Form 1042-S instead of Form W-2. For more information on Form 1042-S, please see the [IRS Web site](#).*

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# Taxation Calculations for Non-Resident Aliens

By Melvin Fason

On January 1, 2006 the IRS revised the withholding requirements on wages for nonresident alien (NRA) employees present in the United States. The revision changed the way a NRA must fill out their W-4. Nonresident alien employees still have to select single as their marital status, claim no more than one allowance, and cannot claim “exempt”; however, they are no longer required to request a specific additional withholding amount. These employees must also write “Nonresident Alien” or “NRA” on the dotted line of line 6 on the W-4 form.

The revision also required employers to implement a special calculation for withholding from the wages of NRA employees. Employers were given a one year transition period to update their systems to apply the new procedure. The calculation is designed to offset the personal exemption built into the graduated withholding tables for which the NRA is not eligible.

Effective with earnings paid on or after January 1, 2007, the University of Illinois has implemented this required calculation.

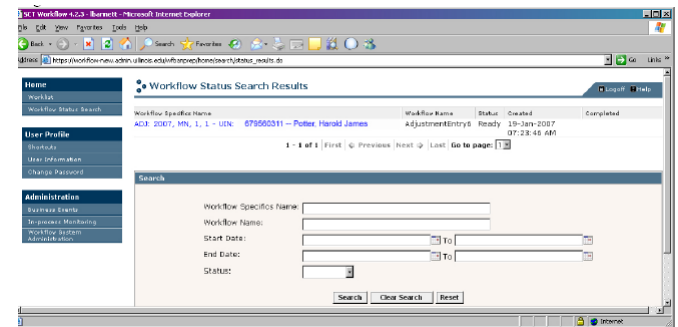
Individuals affected by this change should review their W-4 status. Unless they submit a new W-4 indicating no additional withholding amount, the increased withholding rate of the new calculation, as well as the additional withholding amount on the W-4 currently on file, will be applied to their federal withholdings.

# Workflow Upgrade

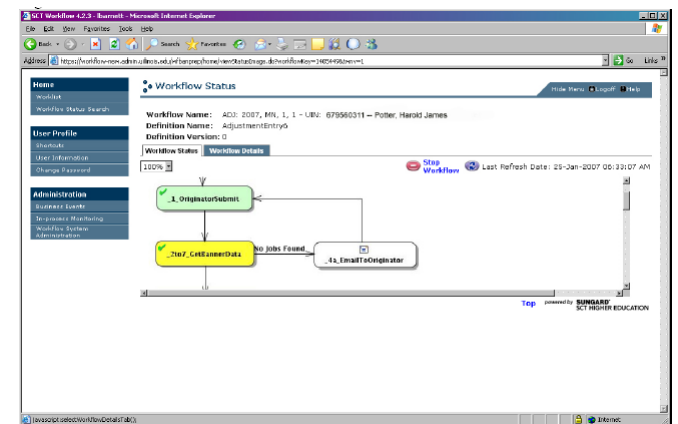
By Laura Barnett

The Workflow application was upgraded to version 4.2.3 on January 28, 2007. While you may have noticed that this version has a slightly different look and feel, the Workflow Adjustment steps remain unchanged.

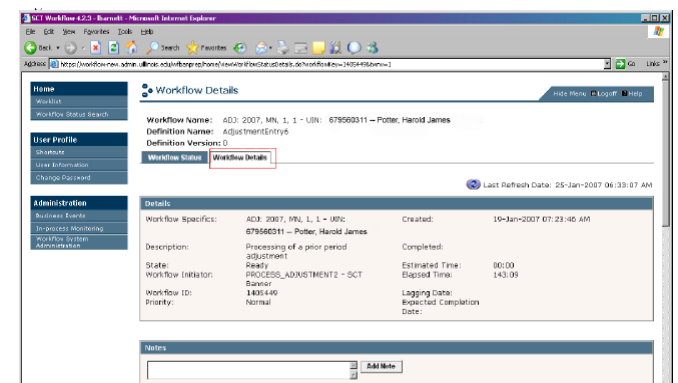
The changes in appearance for end-users include colors and fonts and minor changes in layout in the Workflow Status Search.



The activities and details of a work-item no longer appear in a column on the right side of the screen.



Instead, the Workflow details are accessed from the Workflow Details tab.



## Current Quarter

### ANA Discussions

University Payroll and OBFS Business Information Systems have begun analysis on enhancing the Adjustment Notification Application (ANA). ANA currently gathers information from Banner so that Units can submit payroll related adjustments\* and leave balance adjustments to Central (Payroll or HR) locations. Once received by the Central location, Payroll or HR must manually update Banner. Future ANA functionality would allow the application to update Banner – eliminating the manual entry in Banner. Other enhancements are also planned.

University Payroll will discuss this project in more detail at sessions offered at each campus

Chicago - March 8 – 3:15 p.m. to 4:30 p.m. the First UIC Administrative Staff Leadership Conference by special invitation.

Urbana - March 19 – 1:00 p.m. at the Payroll Townhall held at NSRC 149.

Springfield - March 20 – 10 a.m. at the Payroll Townhall held at PAC-F.

To register for the UIS or UIUC Town Hall, visit the [Training Center Registration page](#) for the appropriate campus.

### Payroll Customer Service Office Closure

Payroll Customer Service Centers on all three campuses will be closed for internal training and staff development on Thursday, March 22, 2007. Regular service and business operations will resume at 9 a.m. on Friday, March 23, 2007.

Calls to the Payroll support lines on March 22, 2007 will be directed to voice mail. To log a Payroll case, send an e-mail 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](#).

## Customer Service Metrics

November 2006 – January 2007

	November	December	January
<b>Total Activity</b>	<b>2,035</b>	<b>1,751</b>	<b>3,034</b>
<b>Pending Resolution</b>	<b>2</b>	<b>2</b>	<b>41</b>
<b>Closed</b>	<b>2,029</b>	<b>1,748</b>	<b>2,984</b>

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 142 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 2006 – January 2007

November	December	January
2,867	2,830	3,749

# Important Payroll Dates

## Payroll Training Events

Now Open for Registration

### UIUC

#### *Payroll Overview*

March 12 – 9:00 am to 11:30 am

April 25 – 9:00 am to 11:30 am

#### *Payments to Foreign Nationals Overview*

March 12 – 1:00 pm to 4:00 pm

April 25 – 1:00 pm to 4:00 pm

### UIC

#### *Payroll Overview*

March 16 – 9:00 am to 11:30 am

April 20 – 9:00 am to 11:30 am

#### *Payments to Foreign Nationals Overview*

March 16 – 1:00 pm to 4:00 pm

April 20 – 1:00 pm to 4:00 pm

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

## Foreign National Tax Status Mass Appointment Labs

The dates below are available for status review of new employees and for current employee renewals.

### UIUC

February 19 – 8:30 am to 10:00 am; 10:30 am to 12:00 pm;  
1:30 to 3:00 pm

February 26 – 8:30 am to 10:00 am; 10:30 am to 12:00 pm;  
1:30 to 3:00 pm

March 2 – 8:30 am to 10:00 am; 10:30 am to 12:00 pm;  
1:30 to 3:00 pm

March 9 – 8:30 am to 10:00 am; 10:30 am to 12:00 pm;  
1:30 to 3:00 pm

March 16 – 8:30 am to 10:00 am; 10:30 am to 12:00 pm;  
1:30 to 3:00 pm

March 20 – 1:30 to 3:00 pm

March 26 – 8:30 am to 10:00 am; 10:30 am to 12:00 pm

March 27 – 8:30 am to 10:00 am; 10:30 am to 12:00 pm

### UIC

February 20 – 9:00 am to 10:30 am; 11:00 am to 12:30 pm;  
1:30 pm to 3:00 pm

February 27 – 8:30 am to 10:00 am; 10:30 am to 12:00 pm

March 5 – 9:00 am to 10:30 am; 11:00 am to 12:30 pm; 1:30  
pm to 3:00 pm

March 12 – 9:00 am to 10:30 am; 11:00 am to 12:30 pm; 1:30  
pm to 3:00 pm

March 19 – 8:30 am to 10:00 am; 10:30 am to 12:00 pm

March 28 – 9:00 am to 10:30 am; 11:00 am to 12:30 pm; 1:30  
pm to 3:00 pm

Please refer to the [registration site](#) for updates or changes to the Foreign National Tax Status Mass Appointment Lab offerings.

## Payroll Calculation Deadlines

Pay Event		Calc date/ Time entry due	Pay Date
BW	4	2/13/2007	2/21/2007
BW	5	2/27/2007	3/7/2007
<b>MN</b>	<b>3</b>	<b>3/8/2007</b>	<b>3/16/2007</b>
BW	6	3/13/2007	3/21/2007
BW	7	3/27/2007	4/4/2007
<b>MN</b>	<b>4</b>	<b>4/5/2007</b>	<b>4/16/2007</b>
BW	8	4/10/2007	4/18/2007
BW	9	4/24/2007	5/2/2007

## Questions and Answers

**Q:** I believe my W-2 is incorrect. Who should I contact?

**A:** If you think there is an error on your form W-2 or have questions, you can verify that your reportable taxable gross and Medicare earnings are correct by accessing the Excel spreadsheet created by University Payroll titled [Verification of Taxable Gross and Medicare Earnings on your W-2](#).

To use this spreadsheet, you will need to reference your final earnings statement issued to you for the calendar year 2005 and follow these steps:

- Enter the Year-to-Date (YTD) totals in the right column for each of the items listed on the earnings statement.
- Enter the Gross Pay YTD, Taxable Benefits and Excess Life YTD totals from the Summary section of the earnings statement.
- Enter any remaining YTD amounts listed within the Deduction Summary section of the earnings statement.
- The spreadsheet will automatically calculate the totals for you. The Medicare calculation will also automatically calculate based on the numbers entered above, and will only be applicable if you have Medicare deductions.

If there is a discrepancy between the spreadsheet and your Form W-2, you should contact the University Payroll Service Center at 866-476-3526 or 217-265-6363. If needed, University Payroll will issue you a W-2C to be used for tax preparation. The W-2C and the original W-2 should be sent with your tax forms to the IRS.

**Q:** I work in food service and received some tips. Do I need to report them?

**A:** The IRS considers all tips taxable. You are only required to report them for withholding purposes if they total \$20 in a month. The University requires biweekly paid staff to report tip income on the timesheet for the tips

that were earned. There is a special earn code set up to report tips. The earn code is TIP. One unit would be reported and the rate would be the dollar value of the tips earned in the pay period.

**Q:** A coworker received a 1098-T. What is a 1098-T and should I have received one?

**A:** Form 1098-T is a form used to report education cost to the IRS. The statement would include tuition and related expenses as well as any scholarships or grants credited to the Student's account. Information reported on this form would be helpful to students or parents of students claiming educational credits on their income tax return.

URLS:

[W-2 Access page](#)

[https://nessie.uihr.uillinois.edu/cf/comp/index.cfm?Item\\_id=2935](https://nessie.uihr.uillinois.edu/cf/comp/index.cfm?Item_id=2935)

[IRS](#)

<http://www.irs.gov/>

[OBFS Training Center](#)

<http://www.obfs.uillinois.edu/obfshome.cfm?level=1&path=training&XMLD ata=training1>

[Foreign National Tax Status Mass Appointment \(lab registration site\)](#)

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

[Verification of Taxable Gross and Medicare Earnings on your W-2](#)

<http://www.obfs.uillinois.edu/earnings/calcTaxableGross.xls>