33rd ANNUAL
EDUCATIONAL INSTITUTIONS PAYROLL CONFERENCE

October 27-30, 2019
Rosen Plaza Hotel • Orlando, FL

Legislative and regulatory compliance updates for payroll professionals in education

Earn up to 17.5 RCHs, 1.75 CEUs, or 17.5 CPE credits.

Sponsored by

www.americanpayroll.org
Learning objectives
• Identify reporting requirements for nonresident alien students and faculty
• Learn how the Tax Cuts and Jobs Act impacts educational institutions’ payroll processing
• Understand how data privacy and fraud impact payroll in higher education
• Learn how the IRS assesses penalties and how to deal with an IRS audit

AGENDA

SUNDAY, OCTOBER 27
1:00 p.m. – 6:00 p.m. | Registration
2:00 p.m. – 3:30 p.m. | Workshop Session 1
3:30 p.m. – 4:00 p.m. | Refreshment Break
4:00 p.m. – 5:30 p.m. | Workshop Session 2
6:00 p.m. – 7:30 p.m. | Cocktail Reception and Dinner

MONDAY, OCTOBER 28
7:30 a.m. – 12:00 p.m. | Registration
7:45 a.m. – 8:30 a.m. | Continental Breakfast
8:30 a.m. – 8:45 a.m. | Opening General Session: Innovative Best Practices of Prism Award Winners
8:45 a.m. – 9:45 a.m. | Workshop Session 3
9:45 a.m. – 10:15 a.m. | Refreshment Break
10:15 a.m. – 11:45 a.m. | Workshop Session 4
11:45 a.m. – 1:00 p.m. | Networking Luncheon
1:00 p.m. – 2:30 p.m. | Workshop Session 5
2:30 p.m. – 3:00 p.m. | Refreshment Break
3:00 p.m. – 4:30 p.m. | Workshop Session 6

TUESDAY, OCTOBER 29
7:15 a.m. – 8:00 a.m. | Continental Breakfast
8:00 a.m. – 9:30 a.m. | Workshop Session 6
9:30 a.m. – 9:45 a.m. | Refreshment Break
9:45 a.m. – 11:15 a.m. | Workshop Session 7
11:30 a.m. – 1:15 p.m. | Luncheon:
                            A Federal Wage and Hour Update
1:15 p.m. – 2:45 p.m. | Workshop Session 8
2:45 p.m. – 3:00 p.m. | Refreshment Break
3:00 p.m. – 4:00 p.m. | General Session:
                          Data Privacy, Authentication, and the Impact on Payroll

WEDNESDAY, OCTOBER 30
7:15 a.m. – 8:00 a.m. | Continental Breakfast
8:00 a.m. – 9:30 a.m. | Workshop Session 9
9:30 a.m. – 9:45 a.m. | Break
9:45 a.m. – 11:30 a.m. | Closing General Session:
                          Legislative Update and APA Lobbying

Conference Sponsor

HIREtech™
HIREtech specializes in HCM technology solutions that ensure compliance and reduce risk while saving businesses time and money. Services include I-9 and E-Verify compliance, employment and wage verification, unemployment claims management, and tax credits. Our dynamic, mobile-enabled platforms deliver real-time analytics and industry-leading results.
MONDAY

8:45 a.m. – 9:45 a.m.
Opening General Session

20301 | Innovative Best Practices of Prism Award Winners
FOS: Business Management & Organization/1.0 CPE Credit/1.0 RCH

Hear from the 2018 Overall Best Practices and Management Prism Award recipients. They will share how they implemented payroll best practices, how they presented them in their Prism Award nominations, and the impact since winning.

Laurel Serra, CPP
Director, Payroll
Palm Beach State College

Shannon Kelly, CPP
Payroll Manager
Brigham Young University

Daniel Dycus, CPP
Sr. Director, Education Services
American Payroll Association

TUESDAY

11:30 a.m. – 1:15 p.m.
Luncheon

30501 | A Federal Wage and Hour Update
FOS: Business Law/1.0 CPE Credit/1.0 RCH

APA is pleased to introduce you to the new Administrator of the Wage and Hour Division (WHD) at the U.S. Department of Labor, Cheryl Stanton. She will provide an update on wage and hour issues, including her priorities as Administrator, upcoming overtime rules, Payroll Audit Independent Determination (PAID) program, modernized compliance assistance, and future plans of the WHD.

Cheryl Stanton, Esq.
Administrator
Wage and Hour Division U.S. Department of Labor

3:00 p.m. – 4:00 p.m.

General Session

30801 | Data Privacy, Authentication, and the Impact on Payroll
FOS: Information Technology/1.0 CPE Credit/1.0 RCH

In recent years payroll professionals have had a front-row seat to phishing schemes and the consequences of a data breach. As the NIST’s improved digital authentication standards are implemented, organizations should be preparing to comply with new authentication, authorization, and access management requirements. Join us as we evaluate risk-based approaches and the impact on key stakeholders.

Stephanie Salavejus, CPP
Vice President and COO
PenSoft

WEDNESDAY

9:45 a.m. – 11:30 a.m.
Closing General Session

40401 | Legislative Update and APA Lobbying
FOS: Business Law/1.0 CPE Credit/1.0 RCH

This year the APA has engaged with 21 states on issues such as tip reporting, income tax withholding and remittance, creditor garnishments, data privacy, and much more. At the federal level, APA has worked on implementing the Tax Cuts and Jobs Act, renewing the Higher Education Act, and expanding the capabilities of the Child Support Portal. Hear how these issues impact educational institutions.

Alice Jacobsohn, Esq.
Sr. Manager, Government Relations
American Payroll Association

*Faculty and program are subject to change without notice.
SUNDAY

Workshop Session 1
2:00 p.m. – 3:30 p.m.

10201 | Record Retention
FOS: Business Law/1.5 CPE Credits/1.5 RCHs

Employers are required to maintain a variety of sufficient records to establish compliance with federal and state requirements. Record retention is a vital responsibility for payroll professionals. Learn what documents to keep, why you are keeping them, how long you need to store them, and when to dispose of records.

Jeffrey Jacob, CPA, CPP
Assistant Comptroller
Illinois State University

Crystal Dawn Pidjeon, FPC
Payroll Supervisor
Boise State University

10202 | The Power of Providing Exceptional Customer Service in Payroll
FOS: Business Management & Organization/1.5 CPE Credits/1.5 RCHs

In a world where data and information are quickly accessible, today’s customers not only expect more, but they also expect to receive it fast. While paychecks are important, making customers feel special involves more than just getting their paycheck right. Participants will learn simple solutions to help identify ways to improve customer service for external and internal customers.

Nicole Orr, CPP, SHRM-SCP
Director, Payroll and Tax Compliance
Pace University

Workshop Session 2
4:00 p.m. – 5:30 p.m.

10401 | 2020 Form W-4
FOS: Taxes/1.5 CPE Credits/1.5 RCHs

It’s finally here, the Form W-4 in compliance with the Tax Cuts and Jobs Act! This session will walk attendees through the new form and instructions from the perspective of educational institutions, the process at the IRS and U.S. Department of the Treasury to develop the form and instructions, and available resources for payroll professionals and employees to better understand the requirements.

Alice Jacobsohn, Esq.
Sr. Manager, Government Relations
American Payroll Association

Luanne Brown, CPP
Director, Payroll Services
Grand Valley State University

10402 | Using Self-Service to its Full Capability
FOS: Computer Software & Application/1.5 CPE Credits/1.5 RCHs

This session talks about current trends and opportunities available for managers and employees using self-service. Self-service is now the norm for most industries, but what does it mean for your organization? What should you consider if implementing it for the first time or adding a new feature? How do you get your employees on board? Once you are live, what happens next? Are you finished?

Cheryl Seifritz, CPP
Director, Payroll
The Ohio State University

Jill Taylor, MBA, CPP
Director, Payroll and Student Employment Services
Bucknell University

*Faculty and program are subject to change without notice.
MONDAY

Workshop Session 3
10:15 a.m. – 11:45 a.m.

20501 | Assessing the Symptoms: How to Diagnose Your Payroll Best Practices
FOS: Management Services/1.5 CPE Credits/1.5 RCHs

In this session, we will discuss what is a best practice, common best practices in key payroll areas, and tools for implementing best practices. We will explore how you can define and implement your own best practices.

Daniel Dycus, CPP
Sr. Director, Education Services
American Payroll Association

20502 | Disaster Recovery/Business Continuity
FOS: Business Management & Organization/1.5 CPE Credits/1.5 RCHs

Understanding the importance of a disaster recovery and business continuity plan is crucial for higher education institutions. Whether it’s a natural disaster or some other event which disrupts institutional operations, ensuring payroll work flow continues is essential! Learn the dos and don’ts of creating a successful plan to help you weather the storm and keep your operations up and running.

Shannon Kelly, CPP
Payroll Manager
Brigham Young University

Veronica Gonzales, MBA
Associate Comptroller
Central New Mexico Community College

20503 | Skillful Collaboration
FOS: Personal Development/1.5 CPE Credits/1.5 RCHs

Attendees will learn about when collaboration is an effective approach to a project and when it isn’t, why communicating clear expectations to group members is vital for success, which attitudes and behaviors are essential for success, what communication strategies foster collaboration and which ones should be avoided, and why works have so much power.

Crystal Dawn Pidjeon, FPC
Payroll Supervisor
Boise State University

Anders Selhorst, MA, MLIS
Manager of Instructional Design and Learning Development
American Payroll Association

Workshop Session 4
1:00 p.m. – 2:30 p.m.

20701 | Interacting With Multiple Generations
FOS: Personal Development/1.5 CPE Credits/1.5 RCHs

Attendees will learn about the changing workplace, four generations and their characteristics in the workplace, stereotypes associated with each generation, potential challenges when interacting with the different generations, techniques that foster respectful communication with different generations, and how to develop an action plan to connect with all generations in your workplace.

Nicole Orr, CPP, SHRM-SCP
Director, Payroll and Tax Compliance
Pace University

Anders Selhorst, MA, MLIS
Manager of Instructional Design and Learning Development
American Payroll Association

20702 | Paying Deceased Employees
FOS: Business Law/1.5 CPE Credits/1.5 RCHs

When the unfortunate event occurs, is your company prepared to process payments owed to a deceased employee? Payroll, accounts payable, benefits, and human resources need to interact to ensure payments are processed timely and in accordance with federal and state rules. We'll walk through the process and discuss state laws.

Daniel Dycus, CPP
Sr. Director, Education Services
American Payroll Association

20703 | Tax Cuts and Job Act’s Impact on Fringe Benefits
FOS: Taxes/1.5 CPE Credits/1.5 RCHs

In an attempt to equalize the corporate tax treatment of certain employee benefits, the Tax Cuts and Jobs Act requires the inclusion in a non-profit's Unrelated Business Income of certain employee benefits. In this session, we'll review those requirements, discuss changes in the interpretation of the regulations, and explore how institutions are managing the change.

Robyn Diehm
Assistant Controller, Tax and Payroll
University of North Carolina at Charlotte

Nancy Hinchcliff, CPA
Assistant VP, HR Payroll Management
Temple University, Philadelphia

*Faculty and program are subject to change without notice.*
Workshop Session 5
3:00 p.m. – 4:30 p.m.

20901 | Ensuring Your Forms 1042 and 1042-s Are Completed Correctly
FOS: Taxes/1.5 CPE Credits/1.5 RCHs
This session is an overview of Forms 1042-S and 1042 obligations for higher education institutions, including who must file the forms and what information must be reported. We will also address practical issues such as how and when to properly assign Form 1042-S income codes, what needs to be done in the prior year, and how to manage due dates and extension requests.

Danielle Nishida
Principal, Washington National Tax Information Reporting and Withholding
KPMG LLP

20902 | Fraud Prevention in Higher Education
FOS: Business Management & Organization/1.5 CPE Credits/1.5 RCHs
Unfortunately, higher education institutions are just as vulnerable to payroll fraud as other organizations. If the pressure and opportunity exist, an employee may engage in theft. Join us as we evaluate real-world cases to identify the red flags of fraudulent activity and preventative measures that should be implemented to reduce instances of fraud.

Stephanie Salavejus, CPP
Vice President and COO
PenSoft

20903 | Risky Behaviors
FOS: Management Services/1.5 CPE Credits/1.5 RCHs
One of the most underutilized portions of project management is the identification and quantification of risk factors. This session identifies the type of risk factors that are common on projects and different strategies for mitigating those items.

Jeffrey Hill, Ph.D., CPP, PMP
Principal
Mercer-Digital

TUESDAY

Workshop Session 6
8:00 a.m. – 9:30 a.m.

30201 | Garnishments
FOS: Business Law/1.5 CPE Credits/1.5 RCHs
In this session, presenters will discuss employer responsibilities for responding to garnishment information requests, withholding, remittance, reporting, and recordkeeping. Unique issues with part-time employees and independent contractors as well as trends in legislative proposals will be shared.

Nicole Orr, CPP, SHRM-SCP
Director, Payroll and Tax Compliance
Pace University

Alice Jacobsohn, Esq.
Sr. Manager, Government Relations
American Payroll Association

30202 | How to Balance 941/W-2s, etc.
FOS: Taxes/1.5 CPE Credits/1.5 RCHs
Do you balance your payroll taxes every pay period or do you wait until the end of the quarter? Are you leaving this crucial step to an outsourced company? Join us as we discuss the basics of who must file these documents, their due dates, and how to balance them against each other. We’ll explore best practices in record keeping so you can easily balance your payrolls to your 941 and W-2s.

Christine Ness, CPP
Director, Payroll Services
University of San Diego

Laurel Serra, CPP
Director, Payroll
Palm Beach State College

30203 | Immigration – Employment Verification
FOS: Business Law/1.5 CPE Credits/1.5 RCHs
As more scrutiny is placed on illegal immigration, payroll professionals involved in immigration-related employment verification must understand the Form I-9, Employment Eligibility Verification, and E-Verify program. Learn how to avoid pitfalls and address verification for remote employees, resident aliens, and student-employees.

Javier Rey
Form I-9 Subject Matter Expert
LawLogix, a division of Hyland Software
Workshop Session 7
9:45 a.m. – 11:15 a.m.

30401 | Cloud Based Products Roundtable
FOS: Information Technology/1.5 CPE Credits/1.5 RCHs
Join this interactive roundtable to share your successes, issues, and pressing questions on using cloud-based applications. If you have specific topics you would like to have addressed, please send them to Jeff Jacob (jjjacob2@ilstu.edu) by October 1.

Cheryl Seifritz, CPP
Director, Payroll
The Ohio State University

Jeffrey Jacob, CPA, CPP
Assistant Comptroller
Illinois State University

Laurel Serra, CPP
Director, Payroll
Palm Beach State College

30402 | Correcting for the Form W-2c to 941-x and More
FOS: Taxes/1.5 CPE Credits/1.5 RCHs
You've just completed year-end and you're ready to celebrate when you get that dreaded email informing you an employee's Form W-2 is wrong. Corrections can vary from the simple (incorrect SSN) to the complex (paycheck created for a terminated employee). Learn when and how to complete a Form W-2c, when and how to use Form 941-X, as well as the needed journal entries and other affected forms.

Daniel Dycus, CPP
Sr. Director, Education Services
American Payroll Association

30403 | Information Reporting and Withholding Issues for Higher Education
FOS: Taxes/1.5 CPE Credits/1.5 RCHs
This workshop will cover information reporting and withholding issues faced by higher education institutions. Topics will include how to classify income, how to ensure that you have obtained proper documentation from your payees, determining appropriate withholding rates including when to apply reduced withholding under treaties, and how to report income.

Danielle Nishida
Principal, Washington National Tax Information Reporting and Withholding
KPMG LLP

Workshop Session 8
1:15 p.m. – 2:45 p.m.

30601 | Battle Grounds – PM 101 From a Consultant and Client Perspective
FOS: Business Management & Organization/1.5 CPE Credits/1.5 RCHs
Project implementations are stressful, but with solid project management can be very successful. This session looks at project management from both a consultant and an internal perspective and identifies several factors to help you succeed from multiple perspectives.

Luanne Brown, CPP
Director, Payroll Services
Grand Valley State University

Jeffrey Hill, Ph.D., CPP, PMP
Principal
Mercer-Digital

30602 | Nonresident Alien Roundtable
FOS: Taxes/1.5 CPE Credits/1.5 RCHs
Join this interactive roundtable to share your successes, issues, and pressing questions when working with nonresident aliens. If you have specific questions you would like to have addressed, please send them to Dan Dycus (ddycus@americanpayroll.org) by October 1.

Glenna Bennett, CPP
Director, Payroll Services
The George Washington University

Nancy Hinchcliff, CPA
Assistant VP, HR Payroll Management
Temple University, Philadelphia

Jill Taylor, MBA, CPP
Director, Payroll and Student Employment Services
Bucknell University

30603 | Paid Sick Leave – State
FOS: Business Law/1.5 CPE Credits/1.5 RCHs
Paid sick leave laws and regulations at the state level vary based on leave for employees for their own illnesses, leave when employees are caring for family members, and leave related to adoption and childbirth. State laws also vary by covered employer and employees, number of paid days off, and calculation methods. In addition to discussing these laws, presenters will talk about trends at the state level.

Christine Ness, CPP
Director, Payroll Services
University of San Diego

Alice Jacobsohn, Esq.
Sr. Manager, Government Relations
American Payroll Association

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**WEDNESDAY**

**Workshop Session 9**  
8:00 a.m. – 9:30 a.m.

**40201 | Avoiding IRS Penalties the Successful Way**  
FOS: Taxes/1.5 CPE Credits/1.5 RCHs

Are you aware that information reporting penalties increase every year? In this session, we’ll explore ways to avoid the most expensive and commonly imposed payroll penalties from the IRS, including federal tax deposits and information returns.

**Luanne Brown, CPP**  
Director, Payroll Services  
Grand Valley State University

**Veronica Gonzales, MBA**  
Associate Comptroller  
Central New Mexico Community College

**40202 | Managing Termination Pay**  
FOS: Business Law/1.5 CPE Credits/1.5 RCHs

This session discusses termination as an ending of employment, other than retirement, with a specific employer. Federal law says only that we must pay an employee for time worked. For the most part, termination pay is governed at the state level and by company policy. For final pay, what needs to be included and when is it due?

**Daniel Dycus, CPP**  
Sr. Director, Education Services  
American Payroll Association

**Laurel Serra, CPP**  
Director, Payroll  
Palm Beach State College

**40203 | Overpayments**  
FOS: Business Law/1.5 CPE Credits/1.5 RCHs

Payroll overpayments are inevitable in the university environment. Managing the receivables, working the collections, and interfacing with employees all provide challenges for a department that is designed to pay people, not collect from people. This session will examine and review the basic administrative requirements and implementation of best practices to achieve successful, compliant outcomes.

**Robyn Diehm**  
Assistant Controller, Tax and Payroll  
University of North Carolina, Charlotte

**Jeffrey Jacob, CPA, CPP**  
Assistant Comptroller  
Illinois State University

**CERTIFICATION**

**Continuing Professional Education:** The American Payroll Association is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org. The American Payroll Association’s CPE sponsor identification number with NASBA is 103152. The APA will make every effort to resolve complaints regarding NASBA compliance within a reasonable amount of time and in a confidential manner. A formal complaint must be submitted in writing and must set forth a statement of the facts and the specific remedy sought. Submit complaints to: American Payroll Association, Attn: Certification, 660 North Main Avenue, Suite 100, San Antonio, TX 78205-1217. Certification: (210) 226-4600.

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33rd Annual Educational Institutions Payroll Conference | Registration Form
Register online: bit.ly/19-EIPC-registration

1 Registration

Event Code: 19EIPC

☐ I am an APA MEMBER, ID #: ___________________________ $1,260
☐ I am a COLLEAGUE of an APA Member (at the same street address) ______ $1,375

Colleague’s ID #: ___________________________
Member’s Name: ___________________________
Member’s ID #: ___________________________

☐ I am not an APA Member or Colleague. ID# (if known) ___________________________ $1,510

☐ I would like to join APA now AND register at the member rate ______ $1,549

Educational Institutions Payroll Conference Registration Fee ______ $1,260
Annual Membership Dues* ____________________________________________ $254
One-Time Enrollment Fee ____________________________________________ $35

TOTAL __________________________________________________________________________ $1,549

2 Registrant Information (please print)

Registrant’s Primary Address

Name: Ms. ☐ Mr. ☐ ☐
Title: ___________________________
Organization: ___________________________
Street Address: ___________________________
City: ___________________________
State/Province: ___________________________
Country: ___________________________
Zip + 4-Digit/Postal Code: _______ + _______
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(Area/Country Code) __________ (Area/Country Code)
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(For official APA communications, registration confirmations, Payroll Curreny, and PAYTECH-Digital)

Please indicate if you are: ☐ CPA ☐ PA (For NASBA reporting purposes)

Special Dietary Request*

☐ Vegetarian ☐ Gluten-free ☐ Kosher ☐ Vegan ☐ Peanut Allergy
☐ Dairy Allergy ☐ Shellfish Allergy

Needed for new member enrollment

Birth date: __________ / __________ / __________

All Attendees Please Complete This Section.
In case of emergency, contact:

Name: ___________________________
Relation to Attendee: ___________________________
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Have you ever:

Purchased something from the APA? ☐ Yes ☐ No
Had a membership with the APA? ☐ Yes ☐ No
If yes, what name was it under? ___________________________
What was the company name? ___________________________

3 Payment Information

Payment in U.S. dollars must accompany registration form. Currency Converter: www.xe.com

Three Enrollment Options:

☐ Online ☐ Fax ☐ Mail

bit.ly/19-EIPC-registration (210) 224-6038 To address below

☐ I authorize the API Fund for Payroll Education, Inc. to charge my:

☐ American Express ☐ Discover ☐ MasterCard ☐ Visa

Card is: (check one) ☐ Corporate ☐ Personal

Card #: ___________________________
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☐ Make CHECK payable and mail to:

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San Antonio, TX 78205-1217
Email: apaa@americanpayroll.org Visit: www.americanpayroll.org
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☐ I agree to the policies found at bit.ly/APA-policies.

*Dues are subject to change without notice and are nonrefundable. Membership is on an individual basis; corporate memberships are not available. 100% of APA membership dues are deductible as an ordinary business expense.

Registration Fees: Fees include refreshment break, cocktail reception, and dinner on Sunday, October 27, continental breakfast, refreshment breaks, and lunch on Monday, October 28, and Tuesday, October 29, and continental breakfast on Wednesday, October 30.

Dietary Requests and Special Services: Dietary Requests made within two weeks from event start date cannot be guaranteed. By requesting a dietary meal and indicating the meal functions you will be attending, you confirm that you will be eating your dietary meal purchased by APA on your behalf. To address below.

For official APA communications, registration confirmations, Payroll Currency, and PAYTECH-Digital)

Please indicate if you are: ☐ CPA ☐ PA (For NASBA reporting purposes)

Special Dietary Request

☐ Vegetarian ☐ Gluten-free ☐ Kosher ☐ Vegan ☐ Peanut Allergy
☐ Dairy Allergy ☐ Shellfish Allergy

Needed for new member enrollment

Birth date: __________ / __________ / __________

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If yes, what name was it under? ___________________________
What was the company name? ___________________________

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☐ American Express ☐ Discover ☐ MasterCard ☐ Visa

Card is: (check one) ☐ Corporate ☐ Personal

Card #: ___________________________
Exp. Date: ___________________________ CVV Code: ___________________________
Name on Credit Card: ___________________________
Signature of Cardholder: ___________________________

Purchase Order #: ___________________________ (for government agencies/universities only)

☐ Make CHECK payable and mail to:

American Payroll Association
660 North Main Avenue, Suite 100
San Antonio, TX 78205-1217
Email: apaa@americanpayroll.org Visit: www.americanpayroll.org
Phone: (210) 224-6406 • M–F, 8 a.m.–6 p.m. CT

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☐ Dairy Allergy ☐ Shellfish Allergy

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Had a membership with the APA? ☐ Yes ☐ No
If yes, what name was it under? ___________________________
What was the company name? ___________________________

Last updated: 10/04/19

EQT: 9V

FOR OFFICE USE ONLY:
Date: ________________
Order #: ___________ Batch #: ___________ Event Code: 19EIPC
Group #: ___________ Check #: ___________ C/P: ___________ Total: $ ___________

Dress Code
Business casual – A jacket or sweater is recommended, as temperatures vary in the conference rooms.