



# 2024 **EDUCATIONAL INSTITUTIONS** PAYROLL CONFERENCE

**Tackle the most pressing compliance and operational challenges facing payroll professionals in higher education!**

**October 20-23 ■ Jacksonville, Florida USA**

# TRAINING OBJECTIVES FOR THIS CONFERENCE

- Understand how payroll analytics can optimize your payroll process and procedures along with examples of results
- Develop an understanding of what is necessary when paying terminated employees and deceased wage payments
- Identify nonresident alien student and faculty reporting requirements
- Interpret the IRS's requirements for fringe benefits unique to colleges and universities

*Check out this video to see what the Educational Institutions Payroll Conference has to offer!*



## AGENDA

All times are Eastern Time (ET)

### SUNDAY, OCTOBER 20

- 1:00 p.m. – 5:30 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. – 8:00 p.m. | Cocktail Reception and Dinner

### MONDAY, OCTOBER 21

- 7:30 a.m. – 12:00 p.m. | Registration
- 7:45 a.m. – 8:30 a.m. | Breakfast
- 8:30 a.m. – 9:45 a.m. | Welcome Remarks  
Opening General Session
- 9:45 a.m. – 10:15 a.m. | Refreshment Break
- 10:15 a.m. – 11:45 a.m. | Workshop Session 3
- 11:45 a.m. – 1:00 p.m. | Networking Lunch
- 1:00 p.m. – 2:30 p.m. | Workshop Session 4
- 2:30 p.m. – 3:00 p.m. | Refreshment Break
- 3:00 p.m. – 4:30 p.m. | Workshop Session 5

### TUESDAY, OCTOBER 22

- 7:45 a.m. – 8:30 a.m. | Breakfast
- 8:30 a.m. – 10:00 a.m. | Workshop Session 6
- 10:00 a.m. – 10:15 a.m. | Refreshment Break
- 10:15 a.m. – 11:45 a.m. | Workshop Session 7
- 11:45 a.m. – 1:45 p.m. | Luncheon General Session
- 1:45 p.m. – 3:15 p.m. | Workshop Session 8
- 3:15 p.m. – 3:30 p.m. | Refreshment Break
- 3:30 p.m. – 5:00 p.m. | General Session

### WEDNESDAY, OCTOBER 23

- 7:45 a.m. – 8:30 a.m. | Breakfast
- 8:30 a.m. – 10:00 a.m. | Workshop Session 9
- 10:00 a.m. – 10:15 a.m. | Refreshment Break
- 10:15 a.m. – 11:30 a.m. | Closing General Session



# GENERAL SESSIONS\*

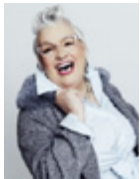
## MONDAY, OCTOBER 21

8:30 a.m. – 9:45 a.m.

### Opening General Session

#### 20301 | Be Powerful, Be You - Carry the Torch: Leading Yourself to Inspire Others

FOS: Personal Development/1.0 RCH/1.0 CPE credit



In a world where leadership is in high demand, but leadership burnout and turnover rates are on the rise, it's crucial for leaders to not only guide their teams but also lead themselves effectively. The "Be Powerful, Be You - Carry the Torch" keynote is a transformative session designed for leaders who want to ignite their inner flame, understand their mission, and influence, impact, and inspire others like never before.

Expect dynamic interaction as Pegine takes you on a rollercoaster ride of self-discovery and empowerment. Her personal journey of triumph and resilience will leave you electrified and motivated. Discover how she turned her flame back on and learn how you can do the same! Dive deep into the TORCH principle, an illuminating framework that will empower you to trust yourself, take responsibility, seek understanding, serve with heart, and inspire greatness within yourself and your team. You'll leave this event with a renewed sense of purpose, armed with the tools to lead yourself and others with passion and authenticity.

**Pegine**  
Keynote Speaker  
Team Pegine

## TUESDAY, OCTOBER 22

11:45 a.m. – 1:45 p.m.

### Luncheon General Session

#### 30501 | Tax Treaty Tips and Tricks

FOS: Business Mgmt. & Organization/1.0 RCH/1.0 CPE credit

Demystify the complexities of tax treaties while gaining practical tips and tricks for leveraging these agreements effectively. This session will offer real-world examples illustrating the intricacies and application of these treaties. Uncover best practices for overseeing treaty benefits and provisions and filing accurate and timely forms. Have your questions ready for a Q&A with the experts!

**Will Drath**  
Nonresident Tax,  
HR/Payroll Operations  
University of Missouri System

**Enda Kelleher**  
Vice President of Sales  
North America  
Sprintax, Inc.

**Zdravka Zlateva**  
Tax Products Development and Compliance Manager  
Sprintax, Inc.

3:30 p.m. – 5:00 p.m.

### General Session

#### 30801 | The Three T's of Payroll Compliance: Technology, Transparency, and Trends

FOS: Information Technology/1.5 RCHs/1.5 CPE credits

In a world of technological transformation where information moves faster and industries are testing new ways of conducting business, government decision-makers are beginning to explore opportunities and misuse. In this session, we will discuss legislative and regulatory trends with payroll impacts, including artificial intelligence, pay statements and methods, paid sick leave, and much more.

**Alice Jacobsohn, Esq.**  
Director, Government Relations  
PayrollOrg

## WEDNESDAY, OCTOBER 23

10:15 a.m. – 11:30 a.m.

### Closing General Session

#### 40401 | Generative AI in Payroll

FOS: Business Mgmt. & Organization/1.5 RCHs/1.5 CPE credits

This session will provide participants with the tools and knowledge to ignite transformation within your organization! Explore the transformative potential of Generative AI to enhance performance and value in payroll. Learn about the key concepts of Generative AI, understand Gen AI's applications in payroll, and the ethical considerations that come with its use.

**Tracee Bowles, CPP, SHRM-SCP**  
Global Payroll Advisory Practice Leader  
The Hackett Group



# WORKSHOP SESSIONS

## SUNDAY, OCTOBER 20

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

#### 10201 | Customer Service

FOS: Communications/1.5 RCHs/1.5 CPE credits

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.

**Luanne Brown, CPP**

Principal

Payroll Center of Excellence

Privately Held Company

**Paul Grisdale, CPP**

Director, Payroll Services

University of Virginia

#### 10202 | Fundamentals of Payroll in Higher Education

FOS: Personnel/Human Resources/1.5 RCHs/1.5 CPE credits

This session will concentrate on the terminology and types of employees and payments unique to the higher ed community. We'll cover everything from adjunct faculty, exempt and nonexempt employees, to grant, work study, and student FICA issues. If you are new to higher ed payroll processing or need a refresher, this session is for you.

**Nancy Hinchcliff, CPA, MS-HRM**

Assistant VP, HR Payroll Management

Temple University

**Karen Phillips**

Director, Payroll

Swarthmore College

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

#### 10401 | Payroll Analytics: Transforming Processes With Data-Driven Insights

FOS: Information Technology/1.5 RCHs/1.5 CPE credits

Are you wondering how payroll analytics can transform your payroll processes? In this session, we'll cover the various types of analytics, their growing importance, and practical ways to utilize them in your everyday payroll processes. Attendees will learn how to use data to identify trends, improve accuracy, and provide insights to the organization that will drive strategic decision-making.

**Mark Thornton, CPA, CPP**

Payroll Tax Supervisor

Southern Company

#### 10402 | Wages Owed to Deceased Employees

FOS: Business Law/1.5 RCHs/1.5 CPE credits

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, discuss state laws, and create a company checklist.

**Laurel Serra, CPP**

Director, Education Services

PayrollOrg

## MONDAY, OCTOBER 21

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

#### 20501 | Payroll Metrics: Driving Efficiency and Accuracy Through Data

FOS: Business Mgmt. & Organization/1.5 RCHs/1.5 CPE credits

Transform your payroll department into a powerhouse of efficiency and accuracy with the right metrics at your fingertips. This session will provide real life examples of payroll metrics and how to leverage them to enhance efficiency, reduce errors, and improve payroll function performance within your organization. Leave with actionable strategies to drive data-informed decisions and operational excellence.

**Shavasha Barnett**

Director, Payroll

Palm Beach State College

**Mark Thornton, CPA, CPP**

Payroll Tax Supervisor

Southern Company

#### 20502 | Payroll System Implementation: Lessons Learned

FOS: Business Law/1.5 RCHs/1.5 CPE credits

So often, when participating in a project, we focus on the scope, execution, timeline, and deliverables and don't seem to recognize the valuable lessons learned. In this session, we will discuss the importance of identifying, documenting, and communicating lessons learned from payroll system implementations to avoid repeating mistakes in a present project and plan proactively for a future project.

**Shannon Kelly, CPP**

Payroll Manager

Brigham Young University

**Jill Taylor, MBA, CPP**

Director, Payroll & Student Employment Services

Bucknell University



# WORKSHOP SESSIONS

## 20503 | PeopleSoft Roundtable

FOS: Computer Software & Applications/1.5 RCHs/1.5 CPE credits

Join other users to discuss PeopleSoft hot topics. Bring your questions as we discuss our challenges and successes together.

**Jeffrey Jacob, CPA, CPP**

Assistant Comptroller  
Illinois State University

**Neatha Snyder, CPP**

Director, Payroll  
University of Kansas Medical Center

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

### 20701 | Managing Termination Pay

FOS: Business Law/1.5 RCHs/1.5 CPE credits

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. Mostly, termination pay is governed at the state level and by company policy. For final pay, what needs to be included, what can be withheld, and when is it due based on if it's a regular resignation or an involuntary term?

**Daniel Dycus, CPP**

Senior Director, Education Services  
PayrollOrg

### 20702 | Payroll Reconciliations and Managing Common Errors

FOS: Accounting/1.5 RCHs/1.5 CPE credits

Do you find your reconciliation process lacking or needing an overhaul? Understanding what different agencies are looking for can help establish a process that will keep your company compliant and ahead of the curve when it comes to common errors. Join us as we identify what payroll elements should be reconciled, how often reconciliations should be performed, and what sources should be used.

**Luanne Brown, CPP**

Principal  
Payroll Center of Excellence  
Privately Held Company

**Chris Pretorius**

Director, Payroll Services  
The University of Texas at Austin

### 20703 | Workday Roundtable

FOS: Computer Software & Applications/1.5 RCHs/1.5 CPE credits

Join other users to discuss Workday hot topics. Bring your questions as we discuss our challenges and successes together.

**Shavasha Barnett**

Director, Payroll  
Palm Beach State College

**Jill Taylor, MBA, CPP**

Director, Payroll & Student Employment Services  
Bucknell University

[Payroll.org/EIPC](http://Payroll.org/EIPC)

## Workshop Session 5 • 3:00 p.m. – 4:30 p.m.

### 20901 | Fringe Benefits, Part 1

FOS: Taxes/1.5 RCHs/1.5 CPE credits

This workshop explores employer-provided fringe benefits that can be excluded from income such as de minimis fringe benefits, qualified parking, and “no-cost” benefits.

**Nancy Hinchcliff, CPA, MS-HRM**

Assistant VP, HR Payroll Management  
Temple University

**Cheryl Seifritz, CPP**

Senior Director, Payroll  
The Ohio State University

### 20902 | Navigating 1042-S Tax Withholding and New E-File Updates

FOS: Taxes/1.5 RCHs/1.5 CPE credits

This session will dive into the key components and common scenarios of filing Form 1042-S, including strategies to ensure accurate withholding, obligations for foreign persons and entities, and recent changes in tax laws and regulations affecting 1042-S. Attendees will leave with a thorough overview of the IRS e-file system enhancements, as well best practices for seamless electronic filing.

**Neil Duffy**

Associate Vice President  
Sprintax, Inc.

**Jeffrey Jacob, CPA, CPP**

Assistant Comptroller  
Illinois State University

**Zdravka Zlateva**

Tax Products Development and Compliance Manager  
Sprintax, Inc.

### 20903 | Paid Leave Mandates: Are You Prepared?

FOS: Business Law/1.5 RCHs/1.5 CPE credits

The objective of this session is to provide an update on state and local paid leave requirements, including sick leave, family leave, and broader leave mandates. Emphasis will be placed on definitions and accrual rates with some assistance in how to track leave requirement changes.

**Alice Jacobsohn, Esq.**

Director, Government Relations  
PayrollOrg

**Christine Ness, CPP, PHR**

Director, Payroll Services  
University of San Francisco

# WORKSHOP SESSIONS

## TUESDAY, OCTOBER 22

### Workshop Session 6 • 8:30 a.m. – 10:00 a.m.

#### 30201 | Accounting for the Payroll Professional

FOS: Accounting/1.5 RCHs/1.5 CPE credits

Accounting does not have to be the dreaded part of the payroll process. The payroll information is critical for the general ledger, cost distributions, creating management reports, and financial statements. We will discuss terminology, journal entries, accruals, reconciliations, internal controls, unclaimed property, and audits and show their effect on your institution's financials.

**Shavasha Barnett**

Director, Payroll

Palm Beach State College

**Nancy Hinchcliff, CPA, MS-HRM**

Assistant VP, HR Payroll Management

Temple University

#### 30202 | A Payroll Leader's Guide to Influencing Government Decision-Makers

FOS: Business Mgmt. & Organization/1.5 RCHs/1.5 CPE credits

In a highly regulated industry, payroll professionals require leadership skills to influence government decision-makers. In this session, we will hone your skills of persuasion to better your ability at problem-solving within your payroll department. These skills include understanding how government agencies make decisions and methods for relating to government employees.

**Alice Jacobsohn, Esq.**

Director, Government Relations

PayrollOrg

#### 30203 | Correcting the W-2: Form W-2c to 941-X and More

FOS: Taxes/1.5 RCHs/1.5 CPE credits

Have you found yourself scrambling to correct Form W-2, or not knowing what has to be done? Are you afraid you'll make more mistakes if you don't know how to make the proper corrections? This session will discuss all the steps you need to take in order to confidently correct a mistake on Form W-2.

**Daniel Dycus, CPP**

Senior Director, Education Services

PayrollOrg

### Workshop Session 7 • 10:15 a.m. – 11:45 a.m.

#### 30401 | Auditing Your Payroll Process

FOS: Business Mgmt. & Organization/1.5 RCHs/1.5 CPE credits

What are some of your payroll processing problem areas and what should you be concerned about? In this session we will discuss how to prepare for both internal and external audits. We will also discuss what processes, procedures and controls you should have in place.

**Paul Grisdale, CPP**

Director, Payroll Services

University of Virginia

**Cheryl Seifritz, CPP**

Senior Director, Payroll

The Ohio State University

#### 30402 | Banner System Roundtable

FOS: Computer Software & Applications/1.5 RCHs/1.5 CPE credits

Join other users to discuss Banner hot topics. Bring your questions as we discuss our challenges and successes together.

**Luanne Brown, CPP**

Principal

Payroll Center of Excellence

Privately Held Company

**Karen Phillips**

Director, Payroll

Swarthmore College

#### 30403 | How to Operationalize a New System

FOS: Business Mgmt. & Organization/1.5 RCHs/1.5 CPE credits

Implementing new payroll software can provide a suite of time-saving features, real-time analytics, self-service, automatic compliance, and mobile capabilities. But if the implementation process goes wrong or you do not operationalize your new system, it can be catastrophic. In this session, we'll identify some problems frequently found and ways to make the new system work for you.

**Jeffrey Jacob, CPA, CPP**

Assistant Comptroller

Illinois State University

**Shannon Kelly, CPP**

Payroll Manager

Brigham Young University

**Chris Pretorius**

Director, Payroll Services

The University of Texas at Austin

# WORKSHOP SESSIONS

## Workshop Session 8 • 1:45 p.m. – 3:15 p.m.

### 30601 | Avoiding IRS Penalties the Successful Way

FOS: Taxes/1.5 RCHs/1.5 CPE credits

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 failure to make federal tax deposits and failure to file information returns.

**Luanne Brown, CPP**

Principal  
Payroll Center of Excellence  
Privately Held Company

**Neatha Snyder, CPP**

Director, Payroll  
University of Kansas Medical Center

### 30602 | Fringe Benefits, Part 2

FOS: Taxes/1.5 RCHs/1.5 CPE credits

This workshop explores fringe benefits that involve more complex analysis to determine taxable amounts such as employer-provided vehicles, tuition waivers, private club expenses, and key employee benefits.

**Nancy Hinchcliff, CPA**

Assistant VP, HR Payroll Management  
Temple University

**Cheryl Seifritz, CPP**

Senior Director, Payroll  
The Ohio State University

### 30603 | Pay Statement Compliance

FOS: Business Law/1.5 RCHs/1.5 CPE credits

State regulations establish what information must be included on employee pay statements or supplemental documents. The guidelines for these documents are also established at the state level. Understand the minimum requirements to determine if your pay statements need to be updated, as well as pay statement best practices, locating requirements in your state(s), and what needs to be included.

**Shannon Kelly, CPP**

Payroll Manager  
Brigham Young University

**Laurel Serra, CPP**

Director, Education Services  
PayrollOrg

## WEDNESDAY, OCTOBER 23

## Workshop Session 9 • 8:30 a.m. – 10:00 a.m.

### 40201 | Multi-State Taxation and Your Mobile Workforce

FOS: Taxes/1.5 RCHs/1.5 CPE credits

With today's mobile workforce, more employees are working outside the company premises – from their homes and in multiple states. This presents a challenge for employers. When is an employee subject to a state's income tax withholding requirements? How do you tax employees when they are working in more than one state? We will also examine nexus and state reciprocal agreements.

**Luanne Brown, CPP**

Principal  
Payroll Center of Excellence  
Privately Held Company

**Chris Pretorius**

Director, Payroll Services  
The University of Texas at Austin

### 40202 | Overpayments: What Do They Require?

FOS: Taxes/1.5 RCHs/1.5 CPE credits

Join us to learn how to handle a payroll receivable when an employee repays in the current year vs. a repayment of a prior year's overpayment. We'll review the necessary tax forms that must be prepared, information provided to the employee, the employee's consent to claim a refund of social security and Medicare taxes, and when we can deduct the overpayment from the employee's wages.

**Laurel Serra, CPP**

Director, Education Services  
PayrollOrg

**Neatha Snyder, CPP**

Director, Payroll  
University of Kansas Medical Center

### 40203 | Record Retention: What Must Be Kept and How Long?

FOS: Business Law/1.5 RCHs/1.5 CPE credits

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

**Christine Ness, CPP, PHR**

Director of Payroll Services  
University of San Francisco