Payroll and Tax & International Operations
Address Changes

- **Deadline is 1/03/14.** We ask that employee’s change their own address by logging onto the U@Penn website.

- Alternatively, your employees may contact their Business Administrator and request that the BA make the appropriate address change in the payroll system.

- W2 forms are sent to the permanent address listed in the Payroll system. If not available, the current address is used.
Overpayments

- All overpayment must be communicated to the payroll office by December 18th and must be paid in full and remitted to the payroll office by **January 3, 2014**.

- If an employee is writing a check it must be for the full amount of the overpayment. No partial payments will be accepted. Please make payment payable to The Trustee’s of the University of Pennsylvania.

- Overpayments reported to the payroll office after the deadline of 12/18/13 and repaid in the following year will be considered “prior year” overpayments and will have further tax implications to the employee.
Off Cycle payments

- The last payroll for 2013 will be processed on Tuesday 12/17/13.
- As we all prepare to leave for winter break the Payroll Office will strive to process all OCP requests within a 3 day window (not the normal 3 to 5 days).
- We will continue to accept OCP requests through 5:00 on 12/18/13.
- If an individual has direct deposit, the off cycle payment will be deposited to that account. Otherwise, the payments will go to the existing individual’s Total Pay Card account or a new Total Paycard account will be established if necessary.
In the past, the monthly payroll ran on the Friday before the last Friday of the month. Once again, we have made revisions to the schedule for some months so that the payroll will run on the week prior to the pay day. This will allow departments an extra 2 or 3 days to enter information. It will also allow more individuals to have direct deposit for their initial pay therefore bypassing the Total Pay Card.
Foreign National Notes

- **Foreign National Social Security Numbers**
  If an individual has received their Social Security number, they must provide Human Resources with this information as soon as possible.

- **Tax Treaty**
  Tax Treaty benefits are granted on a calendar basis. Foreign nationals will have to visit the Tax Office in early January to apply for 2014 benefits.
January 3, 2014 Payroll

- Please note that the 1/3/14 payroll will run on Monday 12/30/13.
- All time must be entered into the payroll system by Monday 12/30/13 at 3:00.
Outsourcing
W-2 printing process

ADP - Provider

- Link will be on the U@Penn portal
- Use single sign on (Pennkey and Password)
- Employees will have the choice to opt out of printing their W-2 forms, which supports the University’s green initiative.
- Reduces printing and mailing costs to the University by giving employees the choice of opting out of receiving a printed form.
- Both Active and Terminated individuals will have access to the system.
- Employees will now have the ability to download their electronic W-2 data to Turbo Tax to facilitate electronic tax filing.

Currently the Tax Department is in the testing stages of this project. Communications regarding this change will be sent out within the next few weeks.

This change will be effective for the 2013 tax year

**1042S forms will continue to be printed by Upenn**
# State Withholding

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<thead>
<tr>
<th>CURRENTLY</th>
<th>NEW FOR 2014</th>
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<tbody>
<tr>
<td>PA</td>
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<td></td>
<td>New Hampshire (n/w)</td>
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</tbody>
</table>

Setup but No W/H States

Alaska, Florida, Nevada, South Dakota, Texas, Washington and Wyoming
Payroll and Tax & International Operations

COVERAGE FOR WINTER BREAK

Offices will be staffed from 8:00 a.m. to 12:00 p.m. 12/27/13, 12/30/13 and 12/31/13.

Offices will be taking phone calls and responding to emails only.

There will be no window hours