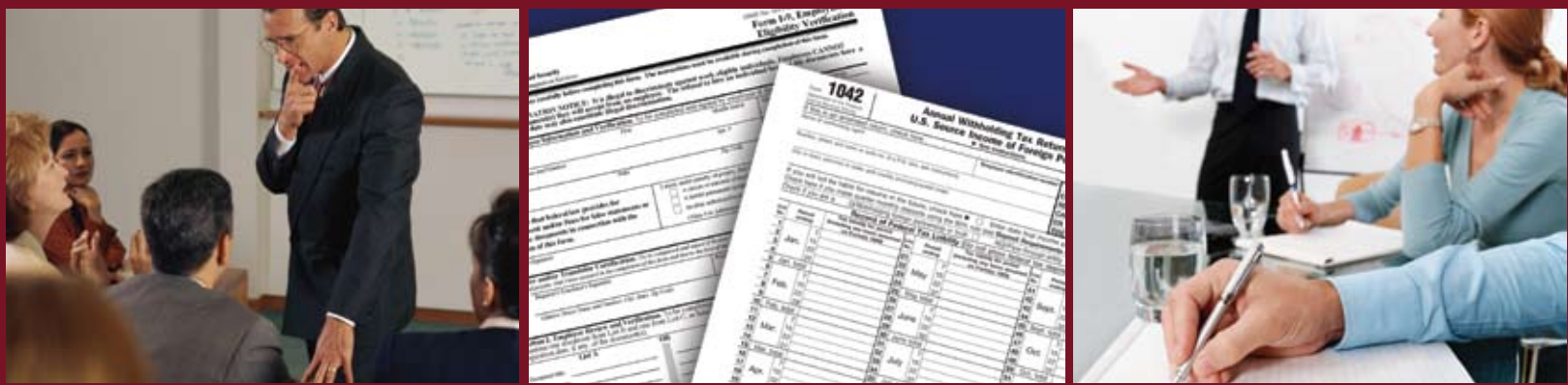




Are you ready to implement the new 403(b) regulations?

22nd Annual Educational Institutions Payroll Conference



Network with your peers while you learn how to accurately implement new regulations and rulings impacting institutions of higher education.

What you will learn:

- How the new 403(b) regulations are being implemented by the IRS
- Latest updates on handling nonresident alien compensation
- Impact of Section 409A on the payment of faculty, coaches, and executives
- Taxation and reporting of educational institutions' unique fringe benefits

"The networking opportunities made this conference invaluable! I learned critical IRS regulations on taxable and nontaxable fringe benefits."

*—Sherry Warden, CPP, CFE
Payroll Accounting Manager
Oklahoma State University*

October 19-22, 2008

Francis Marion Hotel • Charleston, South Carolina

Earn up to: 19 RCHs, 1.9 CEUs, or 21 CPE credits

Fields of Study include: Taxes, Business Law, Business Management & Organization, Administrative Practice and Personal Development

Register online at www.americanpayroll.org

Agenda

Sunday, October 19

- 1:00 p.m. – 5:00 p.m. Registration
- 2:00 p.m. – 3:30 p.m. Pre-Conference Workshop Session 1
- 3:30 p.m. – 4:00 p.m. Refreshment Break
- 4:00 p.m. – 5:30 p.m. Pre-Conference Workshop Session 2
- 6:00 p.m. – 7:30 p.m. Opening “Identify-U” Reunion
Cocktail Reception and Dinner

Monday, October 20

- 7:00 a.m. – 12:00 Noon Registration
- 7:00 a.m. – 8:00 a.m. Continental Breakfast
- 8:00 a.m. – 10:00 a.m. Opening General Session
Welcome and Introductory Remarks
David M. Young, CPA
Associate Treasurer and Tax Manager
Kent State University
Implementing and Maintaining a Compliant 403(b) Plan Under the Comprehensive Final Regulations
Robert Architect
Sr. Tax Law Specialist
Internal Revenue Service
Sondra Dougherty, CPP
Director Support Services
Orange County Dept. of Education
- 10:00 a.m. – 10:30 a.m. Coffee Break With Exhibitors
- 10:30 a.m. – 12:00 Noon Networking Forum
Nonqualified Deferred Compensation Plans and Executive Compensation Plans in Higher Education
Robert Architect
Sr. Tax Law Specialist
Internal Revenue Service
Corey Lehr, CPP
Director, Payroll Compliance and Administration
University of Cincinnati
- 12:15 p.m. – 1:30 p.m. Luncheon With Exhibitors
- 1:45 p.m. – 3:15 p.m. Concurrent Workshop Session 1
- 3:15 p.m. – 3:45 p.m. Refreshment Break With Exhibitors
- 3:45 p.m. – 5:15 p.m. Concurrent Workshop Session 2
Evening at Leisure

Conference Dress Code

Sunday Evening: Wear something from your school to the “Identify-U” Reunion

Sunday – Wednesday: Business casual

A jacket or sweater is recommended, as temperatures vary in the conference rooms.

Continuing Education Credit

Earn up to: 19 RCHs, 1.9 CEUs, or 21 CPE credits by attending this conference.

Tuesday, October 21

- 7:00 a.m. – 8:00 a.m. Continental Breakfast With Exhibitors
- 8:00 a.m. – 11:45 a.m. General Session
- 8:00 a.m. – 9:45 a.m. **Social Security and Medicare Taxes in Higher Education**
Paula Singer, Esq.
Chairman, Windstar Technologies, Inc.
Partner, Vacovec, Mayotte & Singer LLP
Corey Lehr, CPP
Director, Payroll Compliance and Administration
University of Cincinnati
- 9:45 a.m. – 10:15 a.m. Coffee Break With Exhibitors
- 10:15 a.m. – 11:45 a.m. **Immigration Enforcement in the Workplace**
Julie L. Myers
Assistant Secretary of Homeland Security for U.S. Immigration and Customs Enforcement (ICE)
- 12:00 Noon – 1:30 p.m. Luncheon speaker: **Jane Herlong, CSP**
- 1:45 p.m. – 3:15 p.m. Concurrent Workshop Session 3
- 3:15 p.m. – 3:45 p.m. Refreshment Break With Exhibitors
- 3:45 p.m. – 5:15 p.m. Concurrent Workshop Session 4
Evening at Leisure

Wednesday, October 22

- 7:30 a.m. – 8:00 a.m. Continental Breakfast
- 8:00 a.m. – 9:30 a.m. Concurrent Workshop Session 5
- 9:30 a.m. – 9:45 a.m. Coffee Break
- 9:45 a.m. – 12:00 Noon Closing General Session
Implementing Change Management in a Higher Education Payroll Department
Darrell Kozuch
Director, HR Admin. Operations & Support
University of Virginia
Dennis Danilewicz, CPP
Director of Payroll
NYU Medical Center

REGISTRATION FEES: Fees include refreshment break, cocktail reception, and dinner on Sunday, October 19; continental breakfast, coffee and refreshment breaks, and lunch on Monday, October 20, and Tuesday, October 21; and continental breakfast and coffee break on Wednesday, October 22. Registration with payment must be received at least five business days in advance of the conference to guarantee your registration. If you have not received a confirmation e-mail one week prior to the conference, please call APA at (210) 224-6406, M-F, 8:00 a.m. - 6:00 p.m. CT, to confirm your registration. APA reserves the right to limit enrollment to ensure that published objectives will be achieved.

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Hotel Information: Francis Marion Hotel • 387 King Street • Charleston, SC 29403
Phone: (843) 722-0600 • Fax: (843) 723-4633 • Reservations: (877) 756-2121

SUBSTITUTIONS: Please notify APA by letter or by fax at (210) 224-6038, if a participant substitution is needed with the following information: conference name; original registrant’s name; new (substitution) registrant’s name; title; company name; full street address; and phone number. Substitution registrants become ineligible for refunds. If you cannot attend the conference, you must notify APA of your cancellation prior to the dates of the conference. See cancellation policy.

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22nd Annual Educational Institutions Payroll Conference Agenda*

Pre-Conference Sessions

Please select one workshop in each session and mark the appropriate boxes on the Registration Form.

Sunday, October 19

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

10101 Child Support and Employers: an Update From the Federal Perspective

Field of Study: Business Law/1.5 CPE credits/Update

Sherri Grigsby

Employer Services Manager
Federal Office of Child Support
Enforcement

Bill Stuart

Principal Software Developer
Lockheed Martin Enterprise
Solutions and Services

- Participating in e-IWO
- Learn about child support/insurance data matching
- States that require e-payments for child support

This interactive session will provide an update on the child support program, including: new hire reporting, the Electronic Income Withholding Order (e-IWO), remitting payments electronically, and the OCSE's insurance match program.

10102 Introduction to Nonresident Alien Payments

Field of Study: Taxes/1.5 CPE credits/Basic

Terri Crowl

Senior Product Support Analyst
Windstar Technologies, Inc.

Leisa Shelor

Payroll Manager
Virginia Tech

- Immigration status and employment eligibility requirements
- Non-compensatory payments to students
- Compensatory payments to non-employees

This workshop provides a background of immigration and IRS regulations as they relate to employment of foreign nationals. You will receive sample documents underlying many of the statuses discussed and a list of resources that will prove useful when researching the many regulations surrounding payments to nonimmigrant individuals.

10103 Scholarships and Fellowships for International Students and Scholars

Field of Study: Taxes/1.5 CPE credits/Intermediate

Paula Singer, Esq.

Chairman, Windstar Technologies, Inc.
Partner, Vacovec, Mayotte & Singer LLP

- Stipends: scholarship or fellowship vs. compensation for services
- Qualified and nonqualified scholarships and fellowships
- Tax rates and exceptions under income tax treaties

This workshop will describe the rules for defining qualified and nonqualified scholarship and fellowship grants, including when a "stipend" is wages instead of a scholarship or fellowship and the impact of the distinction on tax treaty benefits.

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

10201 Paying Travel Expenses – How Accountable Plans Impact International Scholars and Travel Grants

Field of Study: Taxes/1.5 CPE credits/Intermediate

Paula Singer, Esq.

Chairman, Windstar Technologies, Inc.
Partner, Vacovec, Mayotte & Singer LLP

Terri Crowl

Senior Product Support Analyst
Windstar Technologies, Inc.

- The tax home concept and temporarily away-from-home expenses
- The business purpose and income exclusion under an accountable plan
- Taxable travel grants and withholding and reporting requirements

This workshop will discuss how to determine when travel expenses are business expenses excluded from income under the accountable plan rules and when they are income subject to payroll or withholding taxes. Included will be a discussion of procedures for reducing taxable travel grants of certain recipients with withholding allowance deductions.

10202 Personal Financial Planning for a Secure Future

Field of Study: Administrative Practice/1.5 CPE credits/Basic

David M. Young, CPA

Associate Treasurer and Tax Manager
Kent State University

- Safety reserves
- Using electronic tools in your financial plan
- Taking advantage of tax shelters

During this session you will learn how to maintain a diversified portfolio and understand what those pesky investment terms and formulas really mean.

10203 Garnishments

Field of Study: Business Law/1.5 CPE credits/Intermediate

Jim Medlock, CPP

Director of Education and Training
American Payroll Association

- Managing garnishments other than child support
- Managing multiple garnishments
- Garnishments the law won't let you deduct

Tax levies, wage attachments, and student loans – learn the rules on taking an employee's earnings to reduce their unpaid debts and the penalties for not getting it right.

General Sessions

Monday, October 20

20201 8:00 a.m. – 10:00 a.m. Opening General Session

Implementing and Maintaining a Compliant 403(b) Plan Under the Comprehensive Final Regulations

Field of Study: Taxes/2.0 CPE credits/Intermediate

Robert Architect

Sr. Tax Law Specialist
Internal Revenue Service

Sondra Dougherty, CPP

Director Support Services
Orange County Dept. of Education

Ensure your compliance with the new 403(b) regulations effective January 1, 2009. This session will offer a thorough review of plan document requirements, provider and information sharing agreements, the allocation of responsibilities under the new rules, and an array of limitations and restrictions on distributions, loans, and transfers.

20301 10:30 a.m. – 12:00 Noon Networking Forum

Nonqualified Deferred Compensation Plans and Executive Compensation Plans in Higher Education

Field of Study: Taxes/1.5 CPE credits/Update

Robert Architect

Sr. Tax Law Specialist
Internal Revenue Service

Corey Lehr, CPP

Director, Payroll Compliance and Administration
University of Cincinnati

Find out how the proposed 457(b) regulations interact with IRC Section 409A in administering nonqualified deferred compensation plans. This session will also cover how faculty payment schedules are impacted by Section 409A.

Tuesday, October 21

30201 8:00 a.m. – 9:45 a.m. General Session

Social Security and Medicare Taxes in Higher Education

Field of Study: Taxes/2.0 CPE credits/Basic

Paula Singer, Esq.

Chairman, Windstar Technologies, Inc.
Partner, Vacovec, Mayotte & Singer LLP

Corey Lehr, CPP

Director, Payroll Compliance
and Administration
University of Cincinnati

In this session, experts will discuss public sector social security/Medicare exemptions and coverage, student FICA exemption, and nonresident alien student and lecturer exemptions.

30202 10:15 a.m. – 11:45 a.m. General Session

Immigration Enforcement in the Workplace

Field of Study: Business Law/1.5 CPE credits/Update

Julie L. Myers

Assistant Secretary of Homeland Security for
U.S. Immigration and Customs Enforcement (ICE)

22nd Annual Educational Institutions Payroll Conference Agenda*

- E-Verify and IMAGE programs as means to increase compliance with immigration laws
- Increasing employer investigations and fines
- Student visas

Higher education institutions place high importance on screening and employing nonresident aliens, and correctly handling employees with student visas. Find out how ICE is stepping up its enforcement activity and partnering with employers to secure our borders, protect American workers from identity theft, and prevent human rights violations. This session includes a Q & A period with Ms. Myers.

30301 12:00 Noon – 1:30 p.m.

Guest Speaker

Luncheon

Field of Study: Personal Development/1.0 CPE credit/Basic

Jane Herlong, CSP

Balance work with the rest of your life! Discover the value in learning how to do nothing as well as life-balance in the whole person concept. Jane speaks with honesty and approaches today's troubles with her high-energy, down-home message mixed with uptown humor.

Wednesday, October 22

40301 9:45 a.m. – 12:00 Noon Closing General Session

Implementing Change Management in a Higher Education Payroll Department

Field of Study: Business Management & Organization/2.5 CPE credits/Intermediate

Darrell Kozuch

Director, HR Admin. Operations & Support
NYU Medical Center

Dennis G. Danilewicz, CPP

Director of Payroll
University of Virginia

- Establishing and selling your vision for change
- How to use small wins to accomplish your larger goal
- What has caused some initiatives to fail and how you can prepare to meet that challenge head on

This workshop will explore successful strategies that you can use to capture the hearts and minds of your team as you implement change initiatives.

Concurrent Workshop Topics

Forms 1042 and 1042-S Processing

Field of Study: Taxes/1.5 CPE credits/Basic

20501 Monday, 1:45 p.m. – 3:15 p.m., Session 1

Gary Singer

Paula Singer, Esq.

President and Co-Founder Chairman, Windstar Technologies, Inc. Partner, Vacovec, Mayotte & Singer LLP

- Who must file Form 1042-S information returns
- Form 1042-S coding, IRS edits and validation processing
- Coordinating Forms 1042 and 1042-S

This workshop reviews in detail how to complete and successfully submit your Forms 1042-S information returns and 1042 tax return. Included is information on how to use the IRS Filing Information Returns Electronically (FIRE) System for electronic filing.

Employment Eligibility Verification – Completing the Form I-9

Field of Study: Business Law/1.5 CPE credits/Basic

20502 Monday, 1:45 p.m. – 3:15 p.m., Session 1

Martha Laster

Financial Research/Project Analyst
Virginia Department of Accounts

Leisa Shelor

Payroll Manager
Virginia Tech

- Overview of the newly released Form I-9 – Employment Eligibility Verification
- Employee and employer responsibilities for completing the I-9
- Penalties for prohibited practices

This workshop offers a detailed blueprint for completing Form I-9 for both U.S. citizens and foreign nationals. A review of "sample" completed forms and common errors will help keep you up-to-date on the employment

eligibility verification process.

Fringe Benefits in Higher Education, Part 1

Field of Study: Taxes/1.5 CPE credits/Basic

20503 Monday, 1:45 p.m. – 3:15 p.m., Session 1

Corey Lehr, CPP

Director, Payroll Compliance and Administration
University of Cincinnati

- Vehicles, electronic devices, and other "listed property"
- University perks: tuition benefits, housing, tickets, and club memberships
- Awards, prizes, and discounts

While some benefits may be unique to the academic environment, the rules on permissible exclusions must be consistently applied. This session will provide insights and examples to help with proper determinations and compliant administration of your benefits programs.

The Wonderful World of Form W-4

Field of Study: Taxes/1.5 CPE credits/Basic

20504 Monday, 1:45 p.m. – 3:15 p.m., Session 1

Michael O'Toole, Esq.

Senior Director of Publications and Government Relations
American Payroll Association

- What are the IRS rules on handling "questionable" W-4s?
- How is the IRS combating the problem of underwithholding?
- How should you handle "lock-in" letters for terminated employees?
- Can Form W-4 help you avoid name/SSN mismatch penalties?

In this workshop, we will discuss whether the new IRS rules for sending in W-4s have really reduced employer burden or just created a new set of concerns. You will also learn how to apply a "lock-in" letter sent by the IRS. Find out how the W-4 can help you if you ever get a penalty notice from the IRS for submitting an employee's W-2 with a mismatched employee name and SSN.

Customer Service for Payroll Professionals

Field of Study: Business Management & Organization/
1.5 CPE credits/Intermediate

20505 Monday, 1:45 p.m. – 3:15 p.m., Session 1

40201 Wednesday, 8:00 a.m. – 9:30 a.m., Session 5

Irene Chapman, CPP

Consultant
Irene H. Chapman
& Associates, LLC

Darrell Kozuch

Director, HR Admin. Operations & Support
University of Virginia

- Managing customers' expectations
- Handling the angry employee
- Delivering bad news
- Recovering when you have made a mistake

This workshop sets the stage for achieving exceptional customer service by helping you develop good communications, active listening, and media skills. Additionally, you'll get tips and strategies for handling the types of customer contacts you are most likely to experience in payroll.

Nonresident Alien Withholding Responsibilities for Foreign Entertainers and Athletes

Field of Study: Taxes/1.5 CPE credits/Basic

20601 Monday, 3:45 p.m. – 5:15 p.m., Session 2

30405 Tuesday, 1:45 a.m. – 3:15 p.m., Session 3

Cecile Glunt

Sr. Tax Specialist
Internal Revenue Service

- Withholding Agent definition
- Withholding certificates
- Central Withholding Agreement (CWA)

This session will cover the specific withholding and reporting requirements for performances by foreign athletes and entertainers at higher educational facilities.

Student Employment Issues

Field of Study: Taxes/1.5 CPE credits/Basic

20602 Monday, 3:45 p.m. – 5:15 p.m., Session 2

Fred Crowley

22nd Annual Educational Institutions Payroll Conference Agenda*

Assistant Controller

Massachusetts Institute of Technology

- Claiming exemptions
- Fellowship exclusions and the proper reporting of income
- Self-employment income
- Educational tax credits and various withholding issues

This interactive session will delve into the various tax issues and questions that students – both U.S. citizen and nonresident alien – face during the year and, particularly, in the preparation of their individual federal and state tax returns.

Dealing With Unions in Your Environment

Field of Study: Business Management & Organization/
1.5 CPE credits/Basic

20603 Monday, 3:45 p.m. – 5:15 p.m., Session 2

Dennis G. Danilewicz, CPP

Director of Payroll
NYU Medical Center

- Building effective relationships
- Becoming an integral part of contract negotiations
- Planning payroll's fate

This workshop focuses on building a strong relationship with labor relations and how to become involved in the planning stages of contract negotiations. Learn how the payroll department can be an essential partner in the negotiation process by providing expertise and feedback.

The Family and Medical Leave Act and Its Recent Expansion

Field of Study: Business Law/1.5 CPE credits/Update

20604 Monday, 3:45 p.m. – 5:15 p.m., Session 2

Jim Medlock, CPP

Director of Education and Training
American Payroll Association

- What employees are eligible to take leave under the FMLA
- How will the recent expansion affect your organization
- How to remain in compliance

This year, Congress expanded the Family and Medical Leave Act, and the Labor Department proposed rules clarifying various aspects of this important law. Attend this workshop to find out what these changes are and how they will affect your compliance.

Tax Treaties

Field of Study: Taxes/1.5 CPE credits/Intermediate

20605 Monday, 3:45 p.m. – 5:15 p.m., Session 2

Paula Singer, Esq.

Terri Crowl

Chairman, Windstar Technologies, Inc. Senior Product Support Analyst
Partner, Vacovec, Mayotte & Singer LLP Windstar Technologies, Inc.

- Residency rules for treaty purposes
- Scholarship vs. wage benefits
- The saving clause and exceptions
- Retroactive/prospective loss provisions

This session provides the framework for understanding how U.S. income tax treaties with more than 60 countries work. Find out about eligibility, coverage, limitations, and procedures that apply.

Introduction to Hiring Foreign National Employees for Permanent or Temporary Employment in the United States

Field of Study: Business Law/1.5 CPE credits/Basic

30401 Tuesday, 1:45 p.m. – 3:15 p.m., Session 3

Nicole Dillard, Esq.

Kiyo Oden, Esq.

Partner

Partner

Oden & Dillard, PLLC

Oden & Dillard, PLLC

- Issues HR and payroll professionals face when hiring foreign nationals
- Responsibilities that employers have
- Rules of hiring foreign national employees and keeping track of their immigration status

During this workshop, you will gain an understanding of the different visa categories and which category is appropriate for working with your company. You will also learn the company's responsibility once the foreign national employee is hired.

Making Payments to Foreign Nationals

Field of Study: Taxes/1.5 CPE credits/Intermediate

30402 Tuesday, 1:45 – 5:15 p.m., Sessions 3 & 4 (Double Session)

Linda Dodd-Major, Esq.

Paula N. Singer, Esq.

Attorney at Law

Chairman, Windstar Technologies, Inc.

Partner, Vacovec, Mayotte & Singer LLP

- The four categories of foreign workers
- Assigning foreign workers to the proper category
- Applying withholding and reporting rules by category

This session will help participants untangle the web of legal jurisdictions involved when U.S. educational institutions make different kinds of payments to foreign nationals. You will also learn how to identify and analyze relevant facts, circumstances, and rules.

Independent Contractors in the University Environment

Field of Study: Taxes/1.5 CPE credits/Basic

30403 Tuesday, 1:45 p.m. – 3:15 p.m., Session 3

Fred Crowley

Clifford Brown

Assistant Controller

Fed., State, Local Govt. Specialist

Massachusetts Institute of Technology/Internal Revenue Service

- Surviving an audit
- Legislative changes and recent major court decisions
- College and university-related issues

Independent contractors and consultants are always a hotly contested area of interest for payroll professionals employed by institutions of higher education. This workshop includes an extensive discussion of these issues.

Payroll and Human Resources as Partners

Field of Study: Business Management & Organization/
1.5 CPE credits/Basic

30404 Tuesday, 1:45 p.m. – 3:15 p.m., Session 3

Sondra Dougherty, CPP

Darrell Kozuch

Director, Support Services

Director, HR Admin.

Orange County Dept. of Education

Operations & Support
University of Virginia

- Speaking the same language
- Working together on the same goals
- Effective tools for data sharing

This workshop will discuss strategies for building a successful relationship between payroll and human resources. Effective and efficient service delivery requires bridging the gap between these functions. This workshop provides the foundation you need to begin the process.

Internal Controls

Field of Study: Business Law/1.5 CPE credits/Basic

30501 Tuesday, 3:45 p.m. – 5:15 p.m., Session 4

- Separation of duties
- Procedure documentation
- Reconciliation
- Management policy

Internal controls are essential in keeping employee information and your company's assets safe, whether you are a one-person shop or work in a large payroll department. This session will present the principles and techniques necessary for basic internal controls for payroll.

Reengineering the Payroll Process

Field of Study: Business Management & Organization/
1.5 CPE credits/Basic

30502 Tuesday, 3:45 p.m. – 5:15 p.m., Session 4

Roger A. Smith, CPP

Payroll Management Consultant

PayrollProf.com

- Process modeling and improvement overview
- "Out of the box" thinking
- Process improvement methodologies
- Process modeling tools and techniques

This interactive workshop will show you how to improve your payroll department by defining your current processes and designing improved processes using process modeling methodologies. See a demonstration of computer-aided process modeling techniques.

Cafeteria Plans and How the New Regulations Impact Plan Administration

Field of Study: Taxes/1.5 CPE credits/Update

30503 Tuesday, 3:45 p.m. – 5:15 p.m., Session 4

Jim Medlock, CPP

Director of Education and Training
American Payroll Association

- Qualified benefits that can be offered
- Impact of the IRS's proposed Section 125 regulations on payroll
- Taxation and reporting requirements

Do you know what effect the new regulations are going to have on how you run your cafeteria plan? Attend this session to have some of your questions answered and learn how to avoid some common noncompliance problems.

Fringe Benefits in Higher Education, Part 2

Field of Study: Taxes/1.5 CPE credits/Intermediate

30504 Tuesday, 3:45 p.m. – 5:15 p.m., Session 4

Darrell Kozuch

Director, HR Admin. Operations & Support
University of Virginia

- Group-term life insurance
- Moving expenses
- Dependent care benefits

Attend this workshop for procedural guidance and helpful insights on a variety of issues including business travel and group-term life insurance. You will also receive information on dealing with fringe benefits in an academic environment.

How the FLSA Impacts Time and Attendance Programs

Field of Study: Business Law/1.5 CPE credits/Basic

40202 Wednesday, 8:00 a.m. – 9:30 a.m., Session 5

Kevin Choksi

Founder, President, and CEO
WorkForce Software, Inc.

- Managing a diverse and widespread workforce
- Handling complex work and pay rules
- Reducing the exposure to liabilities in FLSA, FMLA, and union compliance

This session will explore the trends and benefits of automating time and attendance in the higher education environment to improve the accuracy of payroll and employee productivity and efficiency.

Scholarship and Fellowship Payments

Field of Study: Taxes/1.5 CPE credits/Intermediate

40203 Wednesday, 8:00 a.m. – 9:30 a.m., Session 5

Corey Lehr, CPP

Director, Payroll Compliance and Administration
University of Cincinnati

Fred Crowley

Assistant Controller
Massachusetts Institute of Technology

- Distinguishing scholarships and fellowships from compensation
- Postdoctoral appointees: employees or fellowship recipients?
- Reporting the income: institutional and student responsibilities
- Scholarships/fellowships provided to nonresident aliens

This session will examine both the requirements and the frequently misunderstood terminology surrounding payments for services rendered as opposed to fellowships. We'll explore how funding influences the determination, when scholarship income is taxable, and the confusing reporting responsibilities.

Managing the Expatriate Employee Taxation Process From W-2 to W-2c

Field of Study: Taxes/1.5 CPE credits/Intermediate

40204 Wednesday, 8:00 a.m. – 9:30 a.m., Session 5

Paula N. Singer, Esq.

Chairman,
Windstar Technologies, Inc.
Partner,
Vacovec, Mayotte & Singer LLP

Jim Medlock, CPP

Director of Education and Training
American Payroll Association

- Taxes that can apply to U.S. citizens and residents working abroad
- Special tax exemptions under the tax law and treaties
- Special withholding rules and required forms for withholding exemptions

The workshop will provide an explanation of the practical issues that payroll professionals must deal with in order to comply with tax rules for U.S. employees performing services abroad (called "expatriates"). We will also cover Form W-2 income reporting issues and the Form W-2c process.

Selecting a 403(b) Third-Party Administrator

Field of Study: Taxes/1.5 CPE credits/Basic

40205 Wednesday, 8:00 a.m. – 9:30 a.m., Session 5

Sondra Dougherty, CPP

Director, Support Services
Orange County Dept. of Education

- Evaluate your need for a service provider
- Questions to ask when selecting a service provider
- Essential components of the 403(b) service provider contract

A service provider provides the expertise and resources to help meet compliance responsibilities under the final 403(b) rules. Join us as we discuss what must be considered before contracting with 403(b) service providers.

*Faculty and program are subject to change without notice.

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www.windstar.com



*As of press time

22nd Annual Educational Institutions Payroll Conference Registration Form

Conference Registration Online: www.americanpayroll.org

Francis Marion Hotel • 387 King Street • Charleston, SC 29403
Phone: (843) 722-0600 • Fax: (843) 723-4633 • Reservations: (877) 756-2121

Select one workshop from each session.

Special Events (Please check all events you plan to attend.)

- 10301 Sunday Opening Cocktail Reception and Dinner
- 20101 Monday Continental Breakfast
- 20201 Monday Opening General Session — Implementing and Maintaining a Compliant 403(b) Plan Under the Comprehensive Final Regulations
- 20301 Monday Networking Forum:
Nonqualified Deferred Compensation Plans
- 20401 Monday Luncheon With Exhibitors
- 30101 Tuesday Continental Breakfast
- 30201 Tuesday General Session — Social Security and Medicare Taxes in Higher Education
- 30202 Tuesday General Session — Immigration Enforcement in the Workplace
- 30301 Tuesday Luncheon Session — Jane Herlong, CSP — Common Sense Principles for Everyday Life
- 40101 Wednesday Continental Breakfast
- 40301 Wednesday Closing General Session — Implementing Change Management in a Higher Education Payroll Department

Pre-Conference – Sunday, October 19

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

- 10101 Child Support and Employers
- 10102 Introduction to Nonresident Alien Payments

- 10103 Scholarships and Fellowships for International Students and Scholars

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

- 10201 Paying Travel Expenses – How Accountable Plans Impact International Scholars and Travel Grants
- 10202 Personal Financial Planning for a Secure Future
- 10203 Garnishments

Conference – Monday, October 20

Session 1 1:45 p.m. – 3:15 p.m.

- 20501 Forms 1042 and 1042-S Processing
- 20502 Employment Eligibility Verification – Completing the Form I-9
- 20503 Fringe Benefits in Higher Education, Part 1
- 20504 The Wonderful World of Form W-4
- 20505 Customer Service for Payroll Professionals

Session 2 3:45 p.m. – 5:15 p.m.

- 20601 Nonresident Alien Withholding Responsibilities for Foreign Entertainers and Athletes
- 20602 Student Employment Issues
- 20603 Dealing With Unions in Your Environment
- 20604 The Family and Medical Leave Act and Its Recent Expansion
- 20605 Tax Treaties

Tuesday, October 21

Session 3 1:45 p.m. – 3:15 p.m.

- 30401 Introduction to Hiring Foreign National Employees
- 30402 Making Payments to Foreign Nationals (double session)
- 30403 Independent Contractors in the University Environment
- 30404 Payroll and Human Resources as Partners
- 30405 Nonresident Alien Withholding Responsibilities for Foreign Entertainers and Athletes

Session 4 3:45 p.m. – 5:15 p.m.

- 30501 Internal Controls
- 30502 Reengineering the Payroll Process
- 30503 Cafeteria Plans and How the New Regulations Impact Plan Administration
- 30504 Fringe Benefits in Higher Education, Part 2

Wednesday, October 22

Session 5 8:00 a.m. – 9:30 a.m.

- 40201 Customer Service for Payroll Professionals
- 40202 How the FLSA Impacts Time and Attendance Programs
- 40203 Scholarship and Fellowship Payments
- 40204 Managing the Expatriate Employee Taxation Process From W-2 to W-2c
- 40205 Selecting a Third-Party Administrator

Conference Registration (08415)

(Includes Pre-Conference and complete Conference registration.)

- I am an APA member \$ 974

Member's ID #: _____

(Update your contact information at www.americanpayroll.org)

- I am a COLLEAGUE of an APA member (at the same street address) \$ 1,034

Colleague's ID #: _____

Member's Name: _____

Member's ID #: _____

- I am NOT an APA Member or Colleague..... \$ 1,134

Become a Member and Register for the Conference

- I would like to join APA at this time AND register for the conference at the special APA member price..... \$ 1,204

EIPC Registration Fee \$ 974

One-Year Annual Membership Dues* \$ 195

One-Time Enrollment Fee..... \$ 35

Total \$ 1,204

Registrant's Information

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Title: _____

Organization: _____

Street Address: _____

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

Needed for new member enrollment:

Birth date: _____ / _____ / _____

Special Dietary Request:

- Vegetarian Gluten-Free Kosher

All Attendees Please Complete This Section

In case of emergency, contact:

Name: _____

Relation to Attendee: _____

Daytime Phone: _____

Evening Phone: _____

* Dues are subject to change without notice and are nonrefundable. Membership is on an individual basis; corporate memberships are not available. Members of the American Payroll Association receive PAYTECH magazine as part of their annual dues of \$195, \$50 of which is allocated for their subscription to PAYTECH, which is nonrefundable therefrom. 100% of membership dues are deductible as an ordinary business expense.

Payment Information

Payment in U.S. dollars must accompany registration form.

Currency Converter: www.americanpayroll.org

Three Enrollment Options:

- Online By Fax By Mail

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Questions? Call (210) 224-6406, 8:00 a.m. - 6:00 p.m. CT, Monday - Friday

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