



EDUCATIONAL INSTITUTIONS PAYROLL  
C O N F E R E N C E

30TH ANNUAL  
**EIPPC**

**October 23-26, 2016**

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## LEARNING OBJECTIVES

- Identify nonresident alien student and faculty reporting requirements
- Plan how to comply with the PATH Act and other recent legislation and regulatory actions impacting your institution
- Interpret the IRS' requirements for unique fringe benefits provided by colleges and universities
- Identify how the DOL's increase of the white collar minimum salary requirement will impact your institution

## AGENDA

### Sunday, October 23

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

### Monday, October 24

7:00 a.m. – 12:00 p.m.	Registration
7:00 a.m. – 8:00 a.m.	Continental Breakfast
8:00 a.m. – 10:00 a.m.	Opening General Session
	Welcome Remarks
	Payroll Best Practices for Your Institution
10:00 a.m. – 10:30 a.m.	Refreshment Break With Sponsor
10:30 a.m. – 12:00 p.m.	Workshop Session 1
12:15 p.m. – 1:30 p.m.	Luncheon
1:30 p.m. – 3:00 p.m.	Workshop Session 2
3:00 p.m. – 3:30 p.m.	Refreshment Break With Sponsor
3:30 p.m. – 5:00 p.m.	Workshop Session 3

### Tuesday, October 25

7:00 a.m. – 8:00 a.m.	Continental Breakfast
8:00 a.m. – 9:30 a.m.	Workshop Session 4
9:30 a.m. – 10:00 a.m.	Refreshment Break With Sponsor
10:00 a.m. – 11:30 a.m.	Workshop Session 5
11:45 a.m. – 1:30 p.m.	Luncheon
	Getting to Know Us – Employers' Responsibilities Under the Child Support Program
1:45 p.m. – 3:15 p.m.	Workshop Session 6
3:15 p.m. – 3:45 p.m.	Refreshment Break With Sponsor
3:45 p.m. – 5:15 p.m.	General Session
	Nonresident Alien Students and Others: Latest Developments

### Wednesday, October 26

7:00 a.m. – 8:00 a.m.	Continental Breakfast
8:00 a.m. – 9:30 a.m.	Workshop Session 7
9:45 a.m. – 11:30 p.m.	Closing General Session
	APA Legislative and Lobbying Update

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## GENERAL SESSION

### Monday 8:00 a.m. – 8:30 a.m.

#### Welcome Remarks

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

### Monday 8:30 a.m. – 10:00 a.m.

#### Payroll Best Practices for Your Institution

20301 FOS: Business Mgmt. & Organization/1.5 CPE Credits/1.5 RCHs

Do you have a mandate to improve your services while reducing costs? Are you struggling to ensure your institution's compliance while improving services and reducing costs? Our panelists from a large public institution, a recognized private institution, and a community college will share their struggles and experiences in making their institution's payroll department a leading organization.

**Karen Phillips**  
*Director, Payroll*  
*Swarthmore College*

**Veronica Gonzales**  
*Sr. Accounting Director, Payroll*  
*Central New Mexico Community College*

**Cheryl Seifritz, CPP**  
*Director, Payroll*  
*The Ohio State University*

### Tuesday 11:45 a.m. – 1:30 p.m.

#### Getting to Know Us – Employers' Responsibilities Under the Child Support Program

30501 FOS: Business Law/1.0 CPE Credit/1.0 RCH

Join us for highlights of the electronic services available to employers on OCSE's child support portal. Hear about electronic income withholding orders (e-IWO) and the employer services web application, which centralize and standardize information exchanges and help reduce the administrative burden on employers working with child support enforcement agencies.

**Robyn Large**  
*Employer Services Team*  
*Office of Child Support Enforcement*

### Tuesday 3:45 p.m. – 5:15 p.m.

#### Nonresident Alien Students and Others: Latest Developments

30801 FOS: Taxes/1.5 CPE Credits/1.5 RCHs

Hear the latest developments in the nonresident alien payment arena. We'll look at what's new at the IRS, the current guidance for Individual Taxpayer Identification Number applications, changes enacted in the Protecting Americans from Tax Hikes Act, reporting and withholding updates, pending income tax treaties, the Foreign Account Tax Compliance Act, and changes to withholding certificates reporting, and more.

**Terri Crowl**  
*Content/Compliance Specialist*  
*Thomson Reuters*

### Wednesday 9:45 a.m. – 11:30 a.m.

#### APA Legislative and Lobbying Update

40301 FOS: Taxes/1.5 CPE Credits/1.5 RCHs

It's been a busy year for payroll, from transit benefit parity to first-time filing of ACA forms, and from new state paycard laws to continuing initiatives to further standardize state child support and wage garnishment procedures. Come hear how APA's lobbying staff and Government Relations Task Force have made sure the payroll agenda was taken seriously as these issues and more unfolded.

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

**Michael O'Toole, Esq.**  
*Sr. Director, Publications, Education, and Govt. Relations*  
*American Payroll Association*





## PRE-CONFERENCE SESSIONS

**Sunday 2:00 p.m. – 3:30 p.m.**

### PRE-CONFERENCE SESSION 1

#### How Virtual Faculty Must Be Taxed

10201 FOS: Taxes/1.5 CPE Credits/1.5 RCHs

When a faculty member or a recruiter works in a state other than where your institution is physically located, do you have the obligation to withhold that state's income tax? How would the proposed Mobile Workforce State Income Tax Simplification Act impact your obligation to withhold? In this session, learn the rules of nexus, residence, reciprocity, SUTA, and more.

**Christine Ness, CPP**  
Payroll Manager  
University of San Diego

**James Medlock, CPP**  
Education Advisor  
American Payroll Association

#### Using Self-Service to Its Full Capability

10202 FOS: Computer Science/1.5 CPE Credits/1.5 RCHs

Self-service, are you in or out? This session will talk about current self-service trends and efficiencies your organization can obtain. We will discuss opportunities available for managers and employees using self-service, what you should think about when implementing, how to tackle change management, and once that's all done, we will discuss what really happens after you implement.

**Cheryl Seifritz, CPP**  
Director, Payroll  
The Ohio State University

**Sunday 4:00 p.m. – 5:30 p.m.**

### PRE-CONFERENCE SESSION 2

#### Nonresident Alien Students and Faculty, Basics

10401 FOS: Taxes/1.5 CPE Credits/1.5 RCHs

In this session we will discuss the four "highways" of taxation – federal, state, social security/Medicare, and treaties. We will discuss how to determine tax residency of employees, how to classify income and source payments, and how to identify and document code- and treaty-based tax exemptions, including the special income tax and social security/Medicare rules for nonresident alien employees.

**Terri Crowl**  
Content/Compliance Specialist  
Thomson Reuters

#### Project Management for the Non-Manager

10402 FOS: Mgmt. Advisory Services/1.5 CPE Credits/1.5 RCHs

Are you implementing a new system? Do you know what the requirements are to be a project manager? This session will help you understand the project management body of knowledge and the tools that most project managers will use to help you successfully implement a new system.

**Jeff Hill, Ph.D., CPP**  
Payroll Solutions Architect  
Sierra-Cedar

## CONFERENCE SESSIONS

**Monday 10:30 a.m. – 12:00 p.m.**

### WORKSHOP SESSION 1

#### Ensuring Your 403(b) Plan Meets IRS Requirements

20501 FOS: Taxes/1.5 CPE Credits/1.5 RCHs

Every year it's important that you review the requirements for operating your 403(b) plan. Join us for an engaging and informative session that will review plan document requirements, universal availability, catch-up contribution rules, and loan and hardship provisions. Learn how to keep your plan in compliance and ways to find, fix, and avoid common mistakes.

**Anne Broccoli**  
*Director, Benefits*  
*University of Virginia*

#### Fringe Benefits, Part 1

20502 FOS: Taxes/1.5 CPE Credits/1.5 RCHs

This workshop explores employer-provided fringe benefits that can be excluded from income under IRC Sec. 132, plus the rules governing awards, prizes, and moving expenses. We will also discuss at length the controversies over cash gifts, gift cards, and gift certificates using real life examples to keep your organization compliant.

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

**Darrell Kozuch**  
*Assistant VP, Human Resources*  
*University of Virginia*

#### Organizing Your Payroll Department

20503 FOS: Business Mgmt. & Organization/1.5 CPE Credits/1.5 RCHs

How should you organize your payroll department? Come to this session to learn what to consider when planning the organization of your payroll office. Learn how other institutions are using FTEs, processes, software, and outsourcing, to work most efficiently in the changing environment called "payroll services." Bring your ideas, too, and let's make this session interactive!

**Richard Grunewald**  
*Associate Director, Payroll Services*  
*Washington State University*

**Karen Phillips**  
*Director, Payroll*  
*Swarthmore College*

**Monday 1:30 p.m. – 3:00 p.m.**

### WORKSHOP SESSION 2

#### Correcting the W-2: From W-2c to 941-X and More

20701 FOS: Taxes/1.5 CPE Credits/1.5 RCHs

No matter how hard we work at year-end, there will always be a W-2 form that needs a correction. Unfortunately, a paycheck was not given out, incorrect withholding was collected on an off-cycle payment, or the name or social security number is wrong. In this session, you will learn how to complete a Form W-2c, the needed journal entries, when Form 941-X is required, and more.

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

#### DOL Wage and Hour Audits

20707 FOS: Business Law/1.5 CPE Credits/1.5 RCHs

In this session we will review the Initial Appointment letter that the U.S. DOL will send to an employer regarding a complaint that they received against the employer. What actions do you take? What if there is a finding of a violation and you owe back wages? How do you process the payments? What other steps must you follow?

**Phil Turke, CPP**  
*Director, Payroll*  
*Cornell University*

#### Ensuring Your Forms 1042 and 1042-S Are Completed Correctly

20703 FOS: Taxes/1.5 CPE Credits/1.5 RCHs

This workshop discusses how to complete and submit your Forms 1042-S information returns and 1042 tax return. Topics include who must file the forms and what information must be reported on the forms, including how to determine the 1042-S Income Codes, when the forms are due, how to request extensions of time to file, how to make corrections, FATCA's impact on these forms, and more!

**Terri Crowl**  
*Content/Compliance Specialist*  
*Thomson Reuters*



## CONFERENCE SESSIONS CONT'D

**Monday 3:30 p.m. – 5:00 p.m.**

### WORKSHOP SESSION 3

#### Customer Service

20901 FOS: Communications/1.5 CPE Credits/1.5 RCHs

This workshop sets the stage for achieving exceptional customer service by helping develop top-notch communication, active listening, and social media skills. Additionally, you will get strategies for handling the types of customer contacts you are most likely to experience in payroll, such as dealing with the angry employee or delivering bad news.

**Darrell Kozuch**

*Assistant VP, Human Resources  
University of Virginia*

#### Nonresident Alien Students and Faculty, Advanced

20902 FOS: Taxes/1.5 CPE Credits/1.5 RCHs

This session will address advanced issues in making payments to foreign nationals, such as how to identify the true beneficial owner of income, the importance of proper classification of income, dealing with agents and central withholding agreements for performing artists and athletes, directed withholding letters from the IRS, and payments of various types to non-U.S. business entities and more!

**Terri Crowl**

*Content/Compliance Specialist  
Thomson Reuters*

#### Wages Owed to Deceased Employees

20903 FOS: Business Law/1.5 CPE Credits/1.5 RCHs

When the unfortunate event occurs, is your institution prepared to process payments owed to a deceased employee? Payroll, accounts payable, benefits, and HR need to interact to ensure payments are processed timely and in accordance with federal and state rules. We'll walk through the process, discuss federal and state tax rules, and talk about how state probate laws impact the payment.

**James Medlock, CPP**

*Education Advisor  
American Payroll Association*

**Tuesday 8:00 a.m. – 9:30 a.m.**

### WORKSHOP SESSION 4

#### Business Continuity Plans

30201 FOS: Business Mgmt. & Organization/1.5 CPE Credits/1.5 RCHs

No one wants or expects a disaster, but it is important that we are prepared to take appropriate actions to protect everyone on the campus. This session explores the importance of taking steps to minimize damage to the extent we can, resuming operations as quickly as possible, and learning the concepts necessary to build and test a good recovery and business continuity plan.

**Robyn Diehm**

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

**Nancy Hinchcliff**

*Assistant VP, HR Payroll Management  
Temple University*



## CONFERENCE SESSIONS *cont'd*

### How Do the New White Collar Regulations Impact Your Institution 30202 FOS: Business Law/1.5 CPE Credits/1.5 RCHs

The Department of Labor's revised "white collar" exemption rules take effect on December 1. We'll discuss the new salary levels and how they will be adjusted in the future to remain relevant, as well as the new ability to include nondiscretionary bonuses in an employee's salary when making the exempt/nonexempt determination. Be prepared to talk about how your institution is getting prepared.

**Michael O'Toole, Esq.**  
*Sr. Director, Publications, Education, and Govt. Relations  
American Payroll Association*

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### Telling Your Story With Metrics and Analytics 30203 FOS: Business Mgmt. & Organization/1.5 CPE Credits/1.5 RCHs

A good story is unforgettable. If you want to learn about a culture, listen to the stories. If you want to change a culture, change the stories. A great story creates a shared experience. A great metrics story creates a new experience — a memorable and personal experience influencing and affecting opinions and perspectives.

**Jeffrey Jacob, CPA**  
*Payroll Manager  
Illinois State University*

**Hilda Soares**  
*Payroll Manager  
Brown University*

## Tuesday 10:00 a.m. – 11:30 a.m.

### WORKSHOP SESSION 5

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#### Auditing Your Payroll Processes 30401 FOS: Mgmt. Advisory Services/1.5 CPE Credits/1.5 RCHs

What are some of your 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.

**Cheryl Seifritz, CPP**  
*Director, Payroll  
The Ohio State University*

**Veronica Gonzales**  
*Sr. Accounting Director, Payroll  
Central New Mexico Community College*

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#### Emerging Trends in Technology 30402 FOS: Computer Science/1.5 CPE Credits/1.5 RCHs

Payroll technology is changing, allowing improved accuracy, greater efficiencies, tax filing, and employee freedom to access and change tax withholding and benefits. Come explore some of the emerging technologies and trends. These include but are not limited to multiple direct deposits, electronic tax filing, online W-2, and employee self-service.

**Lora Benson**  
*Payroll Manager  
Princeton University*



## CONFERENCE SESSIONS *cont'd*

### Fringe Benefits, Part 2

30403 FOS: Taxes/1.5 CPE Credits/1.5 RCHs

Join us for an overview of several popular but confusing fringe benefits. This workshop includes the most recent changes to educational and adoption assistance, plus group-term life insurance, and dependent care. You do not need to attend Fringe Benefits, Part 1 to attend this session.

**Darrell Kozuch**

*Assistant VP, Human Resources  
University of Virginia*

## Tuesday 1:45 p.m. – 3:15 p.m.

### WORKSHOP SESSION 6

#### Overpayments: What Do They Require?

30601 FOS: Business Law / 1.5 CPE Credits /1.5 RCHs

Join us to learn how to handle a payroll receivable when an employee repays in the current year vs. a repayment from 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.

**James Medlock, CPP**

*Education Advisor  
American Payroll Association*

### People Management

30602 FOS: Personnel/HR/1.5 CPE Credits/1.5 RCHs

Managing people can be challenging and rewarding all at the same time. Some people are highly motivated and intelligent workers who are easy to manage, while others make you pull your hair out. This workshop will explore people and change-management techniques while providing real-life practical experiences for new and experienced managers.

**Robyn Diehm**

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

### The Mysteries of Form W-4

30603 FOS: Taxes/1.5 CPE Credits/1.5 RCHs

Form W-4 is the most basic form in payroll, but it can also cause some of the most distressing problems for payroll. While employers no longer have to routinely send in questionable W-4s, has this change reduced employer burden or just created a new set of concerns? Learn exempt W-4s, the lock-in letter process, and the special procedures for handling W-4s completed by nonresident alien employees.

**Michael O'Toole, Esq.**

*Sr. Director, Publications, Education, and Gov't Relations  
American Payroll Association*

## Wednesday 8:00 a.m. – 9:30 a.m.

### WORKSHOP SESSION 7

#### Evolving Your Payroll Department

40201 FOS: Business Mgmt. & Organization/1.5 CPE Credits/1.5 RCHs

The payroll department's roles are evolving in a world of ever-changing laws and regulations, technology, and expectations to report data. Change drives a need for increased efficiencies, flexibility, collaboration, and talent creating an evolution of the functions payroll departments perform in the future. We'll explore potential plans, resources, and tools to assist your payroll department.

**Jeffrey Jacob, CPA**

*Payroll Manager  
Illinois State University*

#### Payroll Leadership in the University

40202 FOS: Personal Development/1.5 CPE Credits/1.5 RCHs

What is an effective leader? Leading and managing payroll is a business-critical activity. In this session we will explore the different traits and styles of effective leadership and when each is appropriate. We will also look at how the different styles and traits may need to be modified in order to be effective with the various generations working in the workplace today.

**Darrell Kozuch**

*Assistant VP, Human Resources  
University of Virginia*

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

40203 FOS: Business Law/1.5 CPE Credits/1.5 RCHs

Payroll professionals face numerous payroll record keeping requirements at all levels of government. It is not always clear what to keep, how long to keep it, and whether you can keep soft copies or must have originals. We'll focus on all the details at the federal level and procedures to follow in order to stay compliant by examining what records to keep and how long to keep records.

**James Medlock, CPP**

*Education Advisor  
American Payroll Association*



# 30th Annual Educational Institutions Payroll Conference

## Registration Form

Select your workshops online; instructions will be emailed to you shortly after registering.

Register online: <https://ebiz.americanpayroll.org/ebusiness/Education/ViewCourse.aspx?CourseID=4>

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\* 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 \$219, \$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.

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

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### 4 All Attendees Please Complete This Section

In case of emergency, contact:

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Last updated: September 2016

EMT: 9V

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## IMPORTANT CONFERENCE DETAILS

**REGISTRATION FEES:** Fees include refreshment break, cocktail reception, and dinner on Sunday, October 23; continental breakfast, refreshment breaks, and lunch on Monday, October 24, and Tuesday, October 25; and continental breakfast and refreshment break on Wednesday, October 26.

**SPECIAL SERVICES:** If you have a disability and require special services, please contact APA at (210) 224-6406, M-F, 8:00 a.m. - 6:00 p.m. CT, at least 14 days in advance to discuss how we may assist you.

**KOSHER AND ONSITE MEAL REQUESTS:** By requesting a kosher meal and indicating the meal functions you will be attending, you confirm that you will be eating your special request meal purchased by APA on your behalf. There is no additional charge for the kosher meal(s) unless you elect not to eat it, fail to pick up the special request meal, or eat a regular attendee meal in its place. In any of these instances, you will be invoiced \$50.00 for each individual kosher meal that you ordered. Vegetarian, gluten-free, and kosher meals will be limited onsite. If one is not selected at the time of registration, it will not be honored onsite.

**HOTEL ACCOMMODATIONS:** Room reservations and hotel arrangements are the responsibility of the individual. APA has reserved a room block at JW Marriott Tucson Starr Pass Resort, 3800 W. Starr Pass Boulevard, Tucson, AZ 85745. Reservations: (877) 622-3140. Room rates: \$170 per night plus \$5 per night resort fee, October 22-26, for single/double occupancy. Taxes are applicable. Room rates are available three days pre- and post-event based on availability. These special rates are available until October 1, 2016. When making your reservations, please reference EIPC. After October 1, 2016, reservations will be accepted on a space available basis at the hotel's prevailing

rate. All reservations must be guaranteed with payment for the first night. Cancellations without penalty must be made 48 hours prior to your arrival. Check-in time is 4:00 p.m.; check-out time is 11:00 a.m.

**SUBSTITUTIONS:** For each transfer/substitution, there is a \$45 administrative fee. 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.

**CANCELLATIONS:** Written requests received seven business days prior — full refund; four to six business days prior — refund less \$50 service charge; fewer than four business days prior — APA credit will be issued less \$100 and will be valid for one year from the date of issue. Cancellations the day of the program or after the program dates are nonrefundable and noncredited. Refunds will be made in original form of payment. APA regrets that refunds will not be given for no-shows.

**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](http://www.learningmarket.org). The American Payroll Association's CPE sponsor identification

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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: Director of Certification, 660 North Main Avenue, Suite 100, San Antonio, TX 78205-1217. Director of Certification: (210) 226-4600. No prerequisites or advance preparation required. Course level: Overview. Delivery method: Group-live. See individual descriptions for Field of Study (FOS).

#### CONTINUING EDUCATION CREDIT

Educational Institutions Payroll Conference participants earn up to 19 RCHs, 1.9 CEUs, or 19 CPE credits

#### 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.

**CONSENT TO USE YOUR PHOTOGRAPH AND CONTACT INFO:** By registering for this program, you are granting official conference photographers permission to photograph you and publish photos in APA publications, social media, and marketing materials. In addition, by attending or speaking at this conference, you are granting APA permission to make your contact information available to our sponsor who may choose to market their products and services to you via email, fax, telephone, mail, or other means.