

# ACES Human Resources

Main Line: 217-333-2664  
Group Inbox: [hr@aces.illinois.edu](mailto:hr@aces.illinois.edu)

ACES HR staff have intermittent on-site work schedules. If no one is available in the office please contact them directly by phone or email



**JOE BOHN, EXECUTIVE DIRECTOR**

[jbohn@illinois.edu](mailto:jbohn@illinois.edu)

- Labor & Employee Relations Activity (Academic Professional, Civil Service, Student)
- Employee Performance Management / Evaluations
- Disability Accommodation Process (ADA)
- Employee Leaves of Absence (FMLA, SURS Disability, Workers Comp, etc)
- Grievances / Employee Concerns
- Process Execution (Background Checks, ANCRA, RNUA, Ethics Training, etc)
- Risk Management (Identification, Assessment, & Mitigation of Issues)
- Departmental/Regional/Unit Outreach



**JACKIE LAWSON, DIRECTOR**

[jblawson@illinois.edu](mailto:jblawson@illinois.edu)

- Provides Policy Establishment and Analysis for ACES
- Promotion Process, Compensation Analysis
- Affirmative Action / EEO
- Process Improvement
- Oversee all Hiring and Appointment Activity for ACES
- Primary Liaison for Federal Retirement Questions



**ASHLEY GRILO, ASSOCIATE DIRECTOR**

[ashleyg@illinois.edu](mailto:ashleyg@illinois.edu)

- Process Extension Academic Professional, Academic Hourly, and Professional Civil Service Hiring, Separations, and Job Changes
- Oversee Extension AP Search and Hiring Process and Practices, Ensuring Effectiveness and Compliance
- Serve as Primary Contact for all Extension Academic Employee Search Forms
- Extension AP Promotion Tracking
- Track and Monitor Extension Vacation/ Sick Leave (VSL) Reporting in my.ACES



**ZACH WIER, SENIOR ASSOCIATE HR MANAGER**

[zwier@illinois.edu](mailto:zwier@illinois.edu)

- Employee Group Focus: Civil Service
- Primary Contact for all Extension Civil Service Hiring and some College Civil Service Hiring
- Process Civil Service Requests: Hiring, FTE Changes, Transfers, Reductions in Force, Resignations, Terminations, Retirements, and Payout of Benefits
- Work as Liason with IHR for Civil Service Testing for Extension Positions
- Departmental Classifier for Select Civil Service Positions



**ALAYNA WENDLING, SR HR STRATEGIC OPS ADVR & ANALYST**

[alaynaw@illinois.edu](mailto:alaynaw@illinois.edu)

- Process College Faculty and Academic Professional Hiring, Separations, and Job Changes
- Oversee College Search and Hiring Process and Practices, Ensuring Effectiveness and Compliance
- Serve as Primary Contact for all College Faculty and Academic Employee Search Forms
- Review and Edit Job Descriptions for College AP and Civil Service Positions for ACES Departments



**COURTNEY LYNCH, SENIOR HR OPERATIONS PARTNER**

[clync@illinois.edu](mailto:clync@illinois.edu)

- Process Academic Hourly, Graduate Assistant, and Visiting Scholar Requests: Hiring, Rehires, and Resignations
- Backup contact for Extra Help, Undergraduate and Graduate Hourly Requests
- Approve Requests for Rehiring Retirees
- Primary Contact for Payroll & Pay Adjusts
- Process FMLA Applications
- Assist with my.ACES system



**CHERISE MARKS, HR OPERATIONS PARTNER**

[cherisem@illinois.edu](mailto:cherisem@illinois.edu)

- Process Extra Help, Undergraduate and Graduate Hourly Requests: Hiring, Rehires, and Resignations
- Process Requests for Rehiring Retirees
- Backup contact for Payroll & Pay Adjusts
- Assist with my.ACES system
- Maintain UI Extension Portal



## HIGHLIGHTS OF EMPLOYEE BENEFITS

*The combination of State and University benefits that make up your total compensation package offer flexibility in meeting your personal needs and goals.*

### State Benefits Eligibility and Cost

Faculty and staff, working at least 50% of a normal work period for nine months or more, and eligible to participate in the State Universities Retirement System (SURS), may participate in State group insurance benefits. Coverage may be extended to eligible dependents, such as spouse or civil union partner and children.

The State of Illinois covers much of the cost of health and dental coverage, and all of the cost of vision and basic life insurance for most employees.

- Full-time employees (work 100% of a normal work period) pay a salary-based premium for health coverage, a premium for dental, and dependent coverage, as well as the cost for any optional plans.
- Part-time employees (work 50-99% of a normal work period) also pay a portion of the State's cost for employee and dependent health and dental coverage in addition to full-time employee and dependent premiums.

### State Health Plans

A choice of plans lets you select the coverage that best meets your needs and those of your family.

- Quality Care Health Plan (QCHP): A nationwide network allows treatment from any doctor or licensed practitioner. However, you will receive the highest benefit when using an in-network provider/facility.
- Managed Care Plans: Depending on your location, you may have a choice of Health Maintenance Organizations (HMO) or Open Access Plans (OAP).
- Consumer Driven Health Plan (CDHP): A high-deductible plan as defined by the IRS. You may choose any provider or hospital for medical services, however, you will experience lower out-of-pocket costs when receiving services from a CDHP in-network provider.
- Health Savings Account (HSA) – Companion to CHDP enrollment only.

### State Dental Plan

The Quality Care Dental Plan (QCDP) offers the flexibility to select any dentist or select in-network providers for enhanced benefits.

### State Vision Care Plan

The Vision Care Plan includes partial coverage for eye exams, eyeglass lenses and frames, or contact lenses.

### State Flexible Spending Accounts

Pay eligible health care and/or dependent care expenses with pre-tax dollars.

- Medical Care Assistance Plan (MCAP): Contribute up to \$2,750 pre-tax per year for medical, dental, vision, and other eligible expenses not paid by health, dental or vision insurance.
- Dependent Care Assistance Plan (DCAP): Contribute up to \$5,250 pre-tax per year per household for your dependent care expenses.

### State Term Life Insurance Plan

Basic coverage is provided to all benefits-eligible employees in an amount equal to your annual salary (up to \$50,000 is tax exempt). Additional life insurance up to eight times annual salary, and coverage for your spouse/civil union partner and children may be purchased.

### Optional AD&D Insurance

- State of Illinois Accidental Death & Dismemberment coverage of up to five times your annual salary may be purchased.
- University plan coverage for yourself, spouse/civil union partner, and children.

### Faculty / Staff Assistance Services

Provides personal, professional, and confidential assistance to all faculty and staff, and their household members experiencing difficulties that impact their work or well-being. Employee assistance services can help clarify issues, identify resources, and offer follow-up assistance as needed.

### Paid Time Off

The University provides a number of paid time off benefits. Your eligibility for and duration of leave will vary depending on your type of position, and/or years of service.

- Holidays - Ten designated holidays plus two additional floating holidays.

- Vacation - Academic Professional employees may earn up to 24 days per year. Civil Service employees may earn up to 28 days per year.
- Sick Leave - Time available to care for yourself, a member of your household or other eligible family members.
- Parental Leave - Up to six weeks per academic year, immediately following the birth, adoption, or foster placement of a child. This is in addition to any sick or vacation leave used.
- Bereavement Leave - Up to five days upon the death of a member of the employee's family, and an additional seven days upon the death of a child.

Other paid time off includes military duty, jury duty or to be a blood, blood platelet or organ donor. Contact Human Resources with questions.

### **Tuition Benefits**

Staff in trainee, apprentice, learner, provisional, or status appointments of 50% time or more; academic employees with an appointment of 25% time or more; and retirees are eligible for tuition waiver benefits. The value of undergraduate level tuition waivers for employees is not taxable. However, the value of graduate-level educational benefits exceeding \$5,250 in a calendar year is subject to employment taxes and must be reported as taxable wages on Form W-2. This taxation does not apply to qualified Teaching Assistants or Research Assistants.

Current employees with at least seven years of service can apply for a 50% tuition waiver for dependent children. The waiver may be available for up to four years at an Illinois state institution of higher education, depending on the employee's length of service and appointment status.

### **State Universities Retirement System (SURS)**

Participation is required for eligible employees. Your contribution, 8% of pensionable earnings, is automatically deducted on a pre-tax basis. An employer contribution varies depending on plan choice. Maximum pensionable earnings, retirement age, vesting, survivor benefit, and other provisions also vary by plan. See

<https://www.surs.org> and select "New to SURS?" to view the three plan choices:

- Traditional Benefit Plan (Defined Benefit)
- Portable Benefit Plan (Defined Benefit)
- Retirement Savings Plan (Defined Contribution)

Employees eligible for SURS are not covered by federal Social Security; therefore no Social Security taxes are withheld from earnings. However, federal Medicare tax, which amounts to 1.45% of Medicare-eligible salary, will be withheld.

### **Optional Supplemental Retirement Plans:**

You may elect to direct part of your pay to investments intended to build a personal retirement fund. You can contribute up to IRS maximums in either or both plans.

- University Supplemental 403(b) Retirement Plan with pre-tax and Roth (after-tax) options.
- State Deferred Compensation 457 Plan with pre-tax and Roth (after-tax) options.

### **Disability Income Plan**

Basic disability benefits for University employees participating in SURS are provided through SURS.

### **University Long Term Disability Plan**

A voluntary supplemental plan may be purchased by State benefits-eligible employees.

### **Adoption Benefit Program**

The State of Illinois Adoption Benefit program will reimburse eligible expenses up to \$1,500.

### **More Information**

If you have questions about any of the benefit plans described, additional information can be found at:

<https://www.hr.uillinois.edu/benefits>

### **University Payroll & Benefits (UPB)**

UPB is available to assist you with questions about healthcare, insurance and retirement plans.

Create a service ticket: [UPB Service Portal](#)

Fax: 217-244-3135

Urbana: 217-265-6363 | Chicago: 312-996-7200 | Springfield: 217-206-7144

Customer Service Phone Hours: 9:00am to 4:00pm

*This brochure only briefly describes the benefits available to University of Illinois System employees. Complete information about eligibility, costs, and coverage may be obtained from UPB. If any differences exist between the information contained in this brochure and the official plan documents, the plan documents will govern. The benefits described may be changed, modified, or eliminated at any time. Receipt of this brochure is not a promise or guarantee of employment.*

This publication may be available in an alternative format upon request. Please contact System Human Resources at [SystemHRServices@uillinois.edu](mailto:SystemHRServices@uillinois.edu) or 217-333-2600.

# Summary of Benefits

Academic Professional Employees

## Insurance and Health Care

The University provides health, dental, and life insurance to academic staff members who are SURS eligible and on appointments equal to at least 50% time and at least nine continuous months. Part-time employees pay a proportionately higher premium. Several health insurance plans and dental plans are available; coverage may be extended to spouses and dependents at the employee's expense. The Benefits office is available to assist with options available for same-sex domestic partners. A number of optional programs are also available, such as additional term life insurance, accidental death and dismemberment insurance, long-term disability insurance, and tax-deferred retirement program.

<https://www.hr.uillinois.edu/cms/One.aspx?portalId=4292&pageId=906841V>

## Shared Benefits

Academic employees donating to a sick leave pool are provided an opportunity to request additional sick leave days when experiencing a catastrophic illness or injury, or when a disability claim is pending before SURS and the employee has exhausted all accumulated sick leave. Employees must donate leave (in one day increments equivalent to the percentage of their appointment) in order to receive the benefits. In order to donate, employees must have accrued a minimum of eleven days of sick leave, vacation, or combined sick leave/vacation. Employees who donate vacation must use all accumulated sick and vacation prior to using any shared benefit leave.

<https://www.hr.uillinois.edu/cms/One.aspx?portalId=4292&pageId=5633Ch>

## Worker's Compensation

An employee who suffers an injury as a result of his or her employment at the University may be entitled to benefits under the Illinois Workers' Compensation Act. This act requires the employee to notify the employer of the occurrence of the accidental injury and of the fact that the employee believes the injury occurred as a result of his or her employment. Failure to give this notice may result in a loss of workers' compensation benefits. The procedure for reporting on-the-job accidental injuries: (1) report the accidental injury, however slight, to the supervisor; (2) seek medical treatment; (3) complete the Injury Report form. Benefits are unaffected by visiting or part-time status as long as salary is provided by the University. The Office of Claims Management administers the workers' compensation benefits (333-1080).

## Vacation

9 Month Academic Year Service Basis: None

12 Month Service Basis: Academic staff receives 24 workdays of paid vacation per appointment year at the percentage of their appointment(s)). Vacation is prorated accordingly for partial year appointments. Vacation is arranged to accommodate the staff member but must be in the best interests of the unit. A maximum accumulation of 48 vacation days may be carried over from one appointment year to the next.

<https://www.hr.uillinois.edu/leave/vacation>

## Sick Leave

Academic staff members (with the exception of medical residents and postdoctoral research associates) who are participants in the State Universities Retirement System or the Federal Retirement System, and who are appointed for at least 50 percent time to a position for which service is expected to be rendered for at least nine consecutive months, will earn sick leave of 12 work days for each appointment year, the unused portion of which shall accumulate without maximum. If these 12 days are fully utilized in any appointment year, up to 13 additional work days will be available for extended sick leave in that appointment year, no part of which 13 days shall be cumulative or eligible for payment. No additional sick leave is earned for a summer appointment. In the case of an appointment for less than a full appointment year, and in the case of a part-time appointment, the 12 days cumulative and the 13 days noncumulative leave shall be prorated.

Medical residents, postdoctoral research associates, SURS annuitants, and other academic and administrative staff members who are not participants in the State Universities or Federal Retirement Systems, and those who are appointed for less than 50 percent time and/or for less than nine consecutive months earn sick leave of 13 work days for each appointment year, no part of which will be cumulative, and the 13 days will be prorated for those on part-time appointments, or on appointments for less than a full appointment year.

<https://www.hr.uillinois.edu/leave/sick>

## Holidays

New Year's Day, Martin Luther King Jr.'s Birthday, Memorial Day, Juneteenth, the Fourth of July, Labor Day, Thanksgiving and day after, Christmas Eve and Christmas, and such other days as may be determined by the president of the University.

<https://www.hr.uillinois.edu/leave/holidays>

## Floating Holidays

Each fiscal year (July 1 to June 30), 2 non-cumulative floating holidays are available to academic staff who are appointed at least 50%. Floating holiday "days" are prorated to the percentage of the employee's appointment. Floating holidays are not prorated for partial year appointments.

## Bereavement Leave

Paid leave of up to five workdays due to death of a member of the employee's immediate family, which includes: father, mother, sister, brother, spouse, domestic partner, civil union partner, child – including child of same-sex domestic partner or civil union partner (if unborn, gestational age must be 20 or more weeks), grandparent, grandchild – including grandchild of a same-sex domestic partner or civil union partner, individual in a biological, adopted, foster, legal ward, step, or in loco parentis relationship, in-law (grandmother-, grandfather-, mother-, father-, brother-, sister-, son-, daughter-in-law), including a relative of a same-sex domestic partner or civil union partner (grandmother, grandfather, mother, father, brother, sister, son, and daughter), member of employee's household. Paid leave of one day due to the death of a relative outside the immediate family including aunt, uncle, niece, nephew, or cousin of the employee.

Under the Illinois Child Bereavement Leave Act, employees otherwise eligible for Family and Medical Leave under Rule 11.07 are eligible for an additional seven (7) unpaid days to attend the funeral, or an alternative to a funeral; to make arrangements necessitated by the death of the child; or to grieve the death of the child. Employees may use accrued leave benefits to remain in pay status while taking leave under this Act. The Act does not create a right for an employee to take unpaid leave that exceeds the unpaid leave time available under FMLA; therefore, employees who have exhausted their 12-week FMLA entitlement may not take the additional seven days under this Act. Leave provided under this Act must be used within 60 days after the employee receives notice of the death of his/her child. If an employee suffers the death of more than one child in any 12-month period, the employee is entitled to take up to six weeks of unpaid bereavement leave in the 12-month period.

Employees are granted **one day** of paid leave for a relative other than the above who is not a member of the employee's household - aunt, uncle, niece, nephew, or cousin of the employee. (Such relatives are regarded as members of the immediate family only if in residence in the employee's household.)

Relationships existing due to marriage will terminate upon the death or divorce of the relative through whom the marriage relationship exists. Current marital status will be defined in accordance with Illinois State law.

A designated supervisor may grant additional leave to an employee who cannot, because of special circumstances, return to work at the completion of the allowable funeral leave days. Such leave will be taken without pay, or accrued vacation time may be used.

<https://www.hr.uillinois.edu/leave/funeral>

## Family Medical Leave

Eligible employees are entitled to up to 12 weeks of family and medical leave at the percentage of their appointments. FMLA is not required to be paid leave; however, employees may use paid vacation and/or sick leave, in accordance with existing University policy, for any portion of this leave. Such leaves will be granted to eligible employees for the birth or adoption of a child; for the care of a child, spouse, or parent who has a serious health condition; or when an employee is unable to perform the function of his or her position due to a serious health condition. Family and medical leave may run concurrently with workers' compensation. For information regarding specific eligibility criteria and the University policy, employees should contact their department/unit or the Office of Academic Human Resources.

Eligibility: 12 months service to the University (not necessary to be continuous) and at least 1250 hours of service in the last 12 months.

<https://www.hr.uillinois.edu/cms/One.aspx?portalId=4292&pageId=5639>

## Leave Without Pay

With appropriate approvals, a member of the academic staff may be granted a leave of absence without pay for a period of one year or less. Such a leave may be renewed in special circumstances, ordinarily for not more than one year. Leave for family reasons is defined as leave without pay for such purposes as child-rearing and care of an invalid or seriously ill spouse, parent, child, or other close relative or member of the household. It is available to males or females, regardless of marital status, and is applicable to the adoption of children. Leave of Absence without Pay is not normally granted to academic staff on visiting appointments.

## Military Leave

Compensation while on military leave for annual training, special or advanced training, and basic training shall be in accordance with the Illinois Military Leave of Absence Act. In the event an employee is called upon for active duty, the employee shall receive leave with pay for up to thirty consecutive days. Leave for service in the Armed Forces of the United States without pay shall be granted to an employee who enlists, volunteers for, or is inducted into such service.

<https://www.hr.uillinois.edu/cms/One.aspx?portalId=4292&pageId=5626>

## Parental Leave

Employees with at least 6 continuous months of employment are eligible for paid leave of up to six calendar weeks per academic year immediately following the birth or adoption of the eligible academic staff member's child. Holidays that fall within the six calendar week period do not extend the parental leave. Parental leave cannot be used intermittently. Employees who hold only hourly appointments (Academic or Grad hourly) are not eligible for this benefit. Leave is counted as part of the 12-week FMLA leave for FMLA-eligible employees (see Family and Medical Leave). Parental leave

is available to both mothers and fathers. Additionally, if both parents are University employees and otherwise eligible, both may receive and use parental leave, but the usage must be concurrent.

## Jury Duty

Release time is granted for the duration of jury duty. The employee may also retain funds paid in compensation for jury duty.

<https://www.hr.uillinois.edu/cms/One.aspx?portalId=4292&pageId=5625>

## SURS Eligibility

New employees must become participants in the State Universities Retirement System (SURS) immediately upon employment if they are employed at least 1% time and continuously for at least four months, except those employees who are SURS annuitants or who hold an F-1 or J-1 visa and have not yet been classified as a "resident alien" for tax purposes. At the time an F-1 or J-1 visa holder becomes classified as a "resident alien," they will become a participant in SURS if their appointment is 1% or greater and for four or more continuous months from the date they are declared a "resident alien."

Contributions of 8% to SURS are deducted from the employee's earnings. Employees who terminate their employment may elect to receive a refund.

Employees who are not eligible to participate in SURS will have Social Security taxes deducted from their applicable earnings (except employees in a F-1 or J-1 visa status and who are non-resident aliens for tax purposes, student employees enrolled in classes half time or greater, and SURS annuitants). There is an option available for these employees to participate in the State of Illinois Deferred Compensation at a 7.5% contribution rate in lieu of Social Security taxes.

<https://www.hr.uillinois.edu/cms/One.aspx?portalId=4292&pageId=974883>

<https://surs.org/>

## Employee Tuition Waiver

All academic staff members who hold an appointment of 25% or greater for at least 3/4 of a term are eligible for a tuition and fee waiver for University courses. Spouses and dependent children of academic staff members having an appointment of at least 25% are treated as residents for purposes of tuition assessment. Tuition is not waived for spouses but may be for dependent children (see Child of Employee Tuition Waiver).

Retired academic staff are also eligible to receive a tuition and fee waiver.

<https://www.hr.uillinois.edu/cms/One.aspx?portalId=4292&pageId=856814>

## Child of Employee Tuition Waiver

A 50% tuition waiver is available for up to 4 years for children of current employees based on child and parent eligibility.

Eligibility:

Child: must be enrolled in and making satisfactory progress toward an undergraduate degree at an Illinois state institution of higher education, be younger than age 25 at the beginning of the academic year, and fall under one of the following relationship categories: natural child, adopted child, stepchild, ward. A child attending University of Illinois whose court-appointed guardian is an eligible employee of the University of Illinois and whose natural parents are deceased or have been declared unfit by court action is eligible for this benefit.

Parent: must have a 50 percent or greater employment over a minimum of 7 academic years at any one or more of the Illinois senior public universities in a capacity that is eligible for participation in SURS. The 7 years do not have to be consecutive. The parent must be a current employee in active status employed at 50 percent time or more in a SURS-eligible position as of the first day of the academic term.

Ineligible employment categories include SURS annuitants (retirees), State Survey employees covered under the personnel policies of the Illinois Department of Natural Resources, employees of University-related organizations (i.e. Foundation, Alumni Association), academic hourly, Civil Service temporary and Extra Help, graduate assistants, and students. The initial application for this benefit must be received by the employee's campus human resources office no later than the last day of instruction (on the student's campus) for the term in which the benefit will apply. There is no retroactivity beyond the current academic term (semester or summer session).

## Student Loan Forgiveness

Extension and University of Illinois employees may be eligible for federal student loan forgiveness programs, such as the [Public Service Loan Forgiveness \(PSLF\) Program](#).

The PSLF Program forgives the remaining balance on your [Direct Loans](#) after you have made 120 [qualifying monthly payments](#) under a qualifying repayment plan while working full-time for a qualifying employer.

On October 6, 2021 the U.S. Department of Education (ED) announced a temporary period during which borrowers may receive credit for payments that previously did not qualify for PSLF or TEPSLF. Learn more about this limited PSLF waiver [here](#).



# HUMAN RESOURCE SERVICES

<https://www.hr.uillinois.edu/>

Listed below are common things you can find and do via Human Resource Services:

## View Earnings Statement Online

1. Access Human Resource Services at <https://www.hr.uillinois.edu/>
2. Click on the "Pay" tab or link.
3. Click on the "Earnings Statement" link.
4. Click on the "Earnings Statement" button on the right hand side of the Compensation-Earnings Statement screen.
5. Logon with your NETID and Active Directory password (contact the CITES Help Desk at (217) 244-7000 or [consult@uillinois.edu](mailto:consult@uillinois.edu) if you need assistance with the logon/password).
6. You should then see your Current Earnings Statement.
7. If you wish to see past earnings statements, click on the "View Historical Earnings Statements" link at top of the form and select which pay period you wish to see from the drop down provided.

## View Benefits Information

This includes: 403b and 457 plans, AD&D, LTD, LTC, & direct link to MyBenefits

1. Access Human Resource Services at <https://www.hr.uillinois.edu/>
2. Click on the "Benefits" tab.
3. Click on the tab for which you wish to find out more information or access your Personal Benefits Statement.

## View your Academic Professional Appointment Information

1. Access Human Resource Services at <https://www.hr.uillinois.edu/>
2. Click on "My UI Info" tab.
3. Click on the "Notice of Appointment (NOA)" link in the "My Employment" box.
4. Click on the "Access NOA" link.
5. Logon with your NETID and Active Directory password (contact the CITES Help Desk at (217) 244-7000 or [consult@uillinois.edu](mailto:consult@uillinois.edu) if you need assistance with the logon/password).

## Change Address Information

1. Access Human Resource Services at <https://www.hr.uillinois.edu/>
2. Click on "My UI Info" tab.
3. Click on the "My Profile" link.
4. Click on the "Access My Profile" link.
5. Logon with your NETID and Active Directory password (contact the CITES Help Desk at (217) 244-7000 or [consult@uillinois.edu](mailto:consult@uillinois.edu) if you need assistance with the logon/password).
6. Click on the "Edit" link next to the address information that needs to be changed.
7. Make the necessary changes.
8. Click "Submit."

## Change Direct Deposit Bank Information

1. Access Human Resource Services at <https://www.hr.uillinois.edu/>
2. Click on the "My UI Info" tab.
3. Click on the "Direct Deposit" link in the "My Pay" box.
4. Click on "Direct Deposit" in the "Take Action" box.
5. Logon with your NETID and Active Directory password (contact the CITES Help Desk at (217) 244-7000 or [consult@uillinois.edu](mailto:consult@uillinois.edu) if you need assistance with the logon/password).
6. Correct the necessary information. When finished making the changes, click "Continue."

## Change Tax Withholding Information (W-4)

1. Access Human Resource Services at <https://www.hr.uillinois.edu/>
2. Click on the "My UI Info" tab.
3. Click on "W-4 Withholding Allowance" link in the "My Pay" box.
4. Click on "Access W-4 Withholding" in the "Take Action" box.
5. Logon with your NETID and Active Directory password (contact the CITES Help Desk at (217) 244-7000 or [consult@uillinois.edu](mailto:consult@uillinois.edu) if you need assistance with the logon/password).
6. Make the necessary changes.
7. Click "Submit" when finished.

## Access your W-2 Electronically

1. Access Human Resource Services at <https://www.hr.uillinois.edu/>
2. Click on the "My UI Info" tab.
3. Click on "W-2 Wage and Tax Statement" link in the "My Pay" box.
4. Click on "Access Tax Forms" in the "Take Action" box.
5. Logon with your NETID and Active Directory password (contact the CITES Help Desk at (217) 244-7000 or [consult@uillinois.edu](mailto:consult@uillinois.edu) if you need assistance with the logon/password).
6. Select the W-2 you wish to view/print.
7. Click on "Continue to View/Print"
8. Printing instructions will appear. Click the link to the document and you will be able to print from Adobe.

## Update Education Information

1. Access Human Resource Services at <https://www.hr.uillinois.edu/>
2. Click on "My UI Info" tab.
3. Click on the "Education & Certification History" link in the "My Education" box.
4. Click on "Access My Profile" in the "Take Action" box.
5. Logon with your NETID and Active Directory password (contact the CITES Help Desk at (217) 244-7000 or [consult@uillinois.edu](mailto:consult@uillinois.edu) if you need assistance with the logon/password).
6. Click on the "Education" link.

8. Click on the "Edit" link next to existing education information that needs to be changed, or click on the "Add Degree" link under an existing institution that you wish to add a degree; or click on the "Add College" link to add degree information from a new College not currently listed.
9. Enter the education information.
10. Click "Continue;" enter your major and/or minor information if you wish.
11. Click "Continue" to update the information in the system.

## Complete Employment Verification for Loan Purposes

1. Access Human Resource Services at <https://www.hr.uillinois.edu/>
2. Click on the "My UI Info" tab.
3. Click on the "Employment Verification System" link in the "My Employment" box.
4. Click on "Access EVS" in the "Take Action" box.
5. Logon with your NETID and Active Directory password (contact the CITES Help Desk at (217) 244-7000 or [consult@uillinois.edu](mailto:consult@uillinois.edu) if you need assistance with the logon/password).
6. Click "Continue."
7. Select "Establish a Vendor Access Number."
8. Click "Continue."
9. Review the two employment verification options by clicking on the links provided.
10. Review "VAN Requirements" and "Instructions for Vendor" by clicking on the links provided.
11. Enter any 4 digit number to be used as a **one-time access** Vendor Access Number; re-enter the VAN number you created for confirmation.
12. Select either "Employment Verification Only" or "Employment and Earnings Verification" from the drop-down menu.
13. Click "Continue."
14. Note the web address for the EVS system on the VAN Created page.
15. Receive email confirmation.

Provide the vendor with the EVS web address: <https://hrnet.uihr.uillinois.edu/evs/>, and VAN, and your UIN/SSN, so they can access your information immediately. Please inform the Vendor they have only one opportunity to access your information with the VAN provided. They should view and print the information before exiting the system.

## Find Job Information / Application Process

1. Access Human Resource Services at <https://www.hr.uillinois.edu/>
2. Click on the "Employment" tab.
3. Search under the appropriate section based on job information you are seeking.

## Obtain Information about Leave (Vacation, Sick, Holiday, Funeral, Leave of Absence, etc.)

1. Access Human Resource Services at <https://www.hr.uillinois.edu/>
2. Click on the "Leave" tab.
3. Click on the link for the topic on which you want information.

## Information about Parking, Public Transportation, Child Care

1. Access Human Resource Services at <https://www.hr.uillinois.edu/>
2. Click on the "Personal Info" tab.
3. Click on the appropriate link for the topic on which you want information.

## Information on Discounts and Other Services

**This includes: cell phone discounts, Barnes and Noble, Computer hardware/software & accessories, i-Card perks, relocation assistance, travel discounts, tuition waivers, vehicle purchase discounts, and others.**

1. Access Human Resource Services at <https://www.hr.uillinois.edu/>
2. Click on the "Benefits" tab.
3. Scroll down to bottom of page to the "Additional Resources" section.
4. Click on the appropriate link for the topic on which you want information.

# Employee Benefits

## Discounts and Other Services

### AAA (Roadside Assistance) Membership

AAA offers a group rate (15% off Basic) membership fee and waiver of \$10 enrollment fee. Contact Julie at 217-398-0495, or mail the [membership application](#) to AAA, c/o Julie Woller, 1610 S. Neil St., Champaign. While the discount is available through the Champaign AAA office, it is open to employees at any of the University of Illinois campus locations.

### Computer Hardware, Software, & Accessories

- [Illini Union Tech Zone \(UIUC\)](#) - University employees can make purchases through Illini Union Tech Zone to receive discounted pricing on desktop and laptop computers, iPods, and more. Apple, Hewlett Packard, Lenovo, Microsoft, and Dell products are available.
- [UIC Bookstore](#) - Students and staff are eligible to receive discounts on computers, software and other accessories at the UIC Bookstore.
- [WebStore](#) - Students, faculty, and staff on all three U of I campuses - in Urbana-Champaign, Chicago, and Springfield - are eligible to receive significant discounts on over 150 software applications offered by the University of Illinois WebStore.

### i-card Perks

Get discounts with your i card! [i-card Perks](#) organizes discounts on dinners out, ice cream, lawn care, and more from local participating merchants. This free service is for all i-card holders.

### Magellan Discount Program

State employees are offered access to a discount program through the Employee Assistance Program vendor, Magellan. A wide range of discounts are offered including health and wellness, entertainment, restaurants, travel and more.

- [Magellan](#) LifeMart Discount Center - Select Magellan on the CMS State Employee Benefits page. Once on the Magellan page, click "Benefits" in the main navigation, then select "Lifemart-Discount."

### Relocation Assistance

Information on [relocation assistance](#) can be found on the Purchasing web site. The contracts described have been awarded to moving companies to help employees and new hires move their belongings.

### Travel Discounts

Information on [travel discounts](#) can be found on the OBFS web site. Discounts are available through preferred vendors for travel transportation and lodging.

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**As a courtesy, information about additional services and discounts is made available to University of Illinois employees. Courtesy discounts are subject to change or discontinuation by the provider at any time, and the University may remove discount offers without notice. While the University screens all offers, these goods and services are not endorsed, guaranteed, or arranged by the University of Illinois. Employees are responsible for checking goods or services offered.**

## Vehicle Discounts

- [Ford X Plan](#)
- [General Motors Supplier Discount](#)

## Cellular Phone Discounts

These discounts refer to cellular phone service for personal use only. For details on purchasing service for official University use, please contact the [OBFS Purchasing Division](#).

- AT&T - 18% service discount.
  - Foundation Account Number 2601169 is for [UIC Staff](#).
  - Foundation Account Number 2596528 is for [Champaign and Springfield Staff](#)
  - University badge or ID
  - State issued ID
- [Sprint Discount](#) - To obtain a discount visit the website.
- T-Mobile – Available through the State’s discount program with Magellan. Select Magellan on the CMS State Employee Benefits page. Once on the Magellan page, click "Benefits" in the main navigation, then select "Lifemart-Discount". Select the Start Saving Today! link; then use the search box to find current T-Mobile discounts.
- Verizon Wireless - [18% service discount](#) & 25% accessories discount. To obtain this discount, fax (888-457-1731) or email [StateofILEmployeeProgram@GL.VerizonWireless.com](mailto:StateofILEmployeeProgram@GL.VerizonWireless.com) the following information to Verizon Wireless:
  - A copy of your University ID card or recent earnings statement with confidential information redacted (e.g. SSN, salary).\*
  - Name
  - Email Address
  - Contact Number
  - Verizon Wireless Account Number or Wireless Number\*Retirees can send a copy of their 1099R statement with confidential information redacted to document retiree status.

These discounts refer to personal cellular phone service use. Please contact the [OBFS Purchasing Division for details on purchasing service for official University use](#).

**Please be aware that discounts and packages offered to University employees may change or be discontinued at any time. Please contact the company or carrier with questions about available discounts.**

## Incomplete List of Benefits, Services, and Other Resources For Academic Professionals in U of I Extension College of Agricultural, Consumer and Environmental Sciences (ACES)

Below is a listing of resources that you can use during your tenure as University of Illinois academic professional employees. If you have any questions about any of these issues or others, please do not hesitate to call the College of ACES Human Resources at 217/333-2664. Welcome to the University of Illinois at Urbana-Champaign and to University of Illinois Extension in the College of Agricultural, Consumer and Environmental Sciences (ACES)! *The following is a summary and does not presume to supersede academic personnel or any other University policies.*

### **Benefits:**

#### **Flexible Spending Plans:**

The Medical Care and Dependent Care Assistance Plans are available to eligible employees to pay for eligible medical and dependent care expenses tax-free on a fiscal year basis. Employees can save tax dollars by signing up for these programs each year, and contributions to pay determined expenses are done via payroll deduction. Contact Benefits Center for new open enrollment forms each May 1-31. In **SYSTEM HR SERVICES** under *Benefits*:

<https://www.hr.uillinois.edu/benefits/fsa>

#### **Tax Deferred Retirement Plans (403B & 457):**

In addition to your retirement deductions (e.g., SURS), you may elect to direct part of your pay – pre-tax dollars – to additional investments intended to build a retirement fund. Your participation in these plans does not reduce any of your UI benefits based on full salary such as retirement, life insurance, disability, or survivor benefits. Contact the Benefits Center (217/333-3111) or **SYSTEM HR SERVICES** under *Benefits*:

<https://www.hr.uillinois.edu/benefits/retirement>

#### **SYSTEM HR SERVICES:**

Employees can initiate certain payroll, benefits, personnel changes, and see policies and appointment information (earnings statements and Notifications of Appointment), as well as initiate electronic employment verifications, etc.

<https://www.hr.uillinois.edu/>

### **Human Resources:**

#### **College of ACES Human Resources, Office of Administration and Finance:**

Provides advice and information to academic and civil service staff employees and their supervisors in the areas of employee relations, employment services (including appointments and payroll), records management, and policy interpretation. Feel free to contact the staff with questions at 217/333-2664. <http://adminfinance.aces.illinois.edu/staff>

### **Other Important Resources:**

#### **Faculty/Staff Assistance Services (FSAS):**

The FSAS is designed to provide personal, professional, and confidential assistance to all academic and civil service staff, their dependents, members of the employee's household, and retirees who are experiencing problems that interfere with their ability to work or their well-being. Help is available as short-term counseling and referral for alcohol and/or drug abuse, emotional, psychological, marriage, family, relationship, personal, and/or stress related problems. All contact with the FSAP is treated with the strictest confidence. You may call the FSAP directly at 217-244-5312.

<http://humanresources.illinois.edu/about/faculty-staff-assistance-services.html>

#### **Faculty/Staff Emergency Fund (FSEF):**

Created by faculty and staff for the sole purpose of financially assisting other faculty and staff in times of financial crisis, the fund is made up entirely of donations by employees. Application for assistance is made by contacting the Faculty/Staff Assistance Services (see above), which administers the grants if approved. A special committee carefully and confidentially reviews each request for approval. Employees working at least 50% for at least 6 months may apply for crisis assistance through the FSAP (217-244-5312). (*NOTE: Donations to this fund*

may also be made through payroll deduction to the UI Foundation. Contact the FSAS for more information.)

<http://humanresources.illinois.edu/fsas/services/emergency-fund.html>

### **U of I Library:**

The University of Illinois Library at Urbana-Champaign is the largest state university library in the United States, and the third largest among all U.S. academic libraries. Learn how to tap into its resources so that you can use the interlibrary loan program. Visit their web site:

<http://www.library.uiuc.edu/>

### **Speech and Hearing Clinic:**

Provides clinical services to faculty, academic professional, and staff employees and their families who may have a hearing impairment, speech, or language disorder. 217/333-2230

### **UI Psychological Services Center:**

The UI Psychological Services Center offers diagnostic evaluations for children, adolescents, and adults. These evaluations help explain academic, social, and/or behavioral problems (e.g., ADHD, learning disabilities, autistic spectrum, mood issues). They also provide counseling on a sliding fee basis. To schedule an evaluation or counseling session, call 217-333-0041. Health Alliance and Health Link are accepted. (See also the FSAP.)

### **UIUC Job Board:**

The UIUC Job Board has information on all current academic professional vacancies at the University of Illinois at Urbana-Champaign.

[https://jobs.illinois.edu/default.cfm?page=job\\_board](https://jobs.illinois.edu/default.cfm?page=job_board)

### **Policy:**

#### **Provost Communications:**

Urbana Campus academic/personnel policy manual.

<http://provost.illinois.edu/communication/index.html>

### **U of I Statutes:**

The *Statutes* state the educational and personnel policies, organization, and governance of the University as delegated by the Board of Trustees.

<http://www.uillinois.edu/trustees/statutes.cfm>

### **U of I General Rules:**

The *Rules* are subordinate to the *Statutes* and deal with organization, duties, and responsibilities of officers of the University.

<http://www.uillinois.edu/trustees/statutes.cfm>

### **Business and Financial Policies/Procedures:**

<http://www.obfs.uillinois.edu>

### **Office for Access and Equity (OAE)**

The mission of the Office for Access and Equity is to serve as a resource to campus units by facilitating compliance awareness and promoting an inclusive community through diversity, education and outreach initiatives.

<https://diversity.illinois.edu/office.html>

### **Campus Administrative Manual (CAM):**

<http://www.cam.illinois.edu/>

### **Unemployment Insurance:**

Check with your local State of Illinois Department of Employment Security and print off a copy of "What Every Worker Should Know About Unemployment Insurance" (Attachments I and II of the U of I policy):

<http://cam.illinois.edu/ix/ix-a/ix-A-12.htm>

### **Other Faculty and Staff Resources:**

[http://illinois.edu/resourcesfor/faculty\\_staff.html](http://illinois.edu/resourcesfor/faculty_staff.html)

### **Miscellaneous Information:**

#### **Travel Discount Information:**

See the miscellaneous travel information at

<http://www.obfs.uillinois.edu/travel/hotels/state-illinois-hotel-discounts/>

### **Employee ID Card ("I-Card") Information:**

<http://www.icard.uillinois.edu/>

### **Council of Academic Professionals (CAP):**

CAP is an elected assembly serving the interests of full-time, part-time, and retired academic professionals at Illinois. They provide direct and concerted communication between academic professional staff and administrative officers of the University. <http://www.cap.illinois.edu>



# Academic Vacation & Sick Leave (AVSL) Reporting System

You will use the my.ACES system to request/report any time off. Time off must be reported in half or full days. Below are instructions on how to access the system, and how to submit a request. If you are unable to login for any reason, or have any questions please contact Ashley Grilo at [ashleyg@illinois.edu](mailto:ashleyg@illinois.edu).

1. Go to <https://my.aces.illinois.edu> page.
2. Login by entering your [NetID](#) and [Active Directory \(AD\) password](#) in the box to the left of the screen.
3. (*First time users*) After logging in, you will see an **Add Content** drop-down Box at the bottom center of the page. Choose **Leave Reporting** from drop-down, and then click **ADD**. The Leave Reporting Box now shows on your screen. It will list your current available leave balances in hours. Click **Report or Request Days Off**. You will be taken to the **Submit Days** screen.
4. (*Active users*) Click "**Leave Reporting**" or "**Report or Request Days Off**". You will be taken to the **Submit Days** screen.
5. Click on the calendar day that you wish to report as time off.
6. Select a radio button for the "Type of day off" and "Amount of time off".
7. Click the **Submit for Approval** button. (You must submit a request for each day you want off.)
8. The days requested will appear in the "Reporting Activity" box to the right with a "Pending" in the Status box. Your supervisor can then approve or deny your time off. Your leave balances will automatically accrue time per day and reflect leave taken during the academic year.

## Helpful Tips

- If you prefer to see all of your leave balances through the end of the academic year instead of through a certain, simply click on "Display summary thru end of the year" below the balance summary table
- If you prefer to list your leave balances in hours rather than days, simply click on "Display summary in hours" below the balance summary table



## **Campus Holiday Schedule 2022 - 2023**

| <b>Date</b>       | <b>Weekday</b> | <b>Holiday</b>  |
|-------------------|----------------|---|
| July 4, 2022      | Monday         | Independence Day  |
| September 5, 2022 | Monday         | Labor Day   |
| November 8, 2022  | Tuesday        | Election Day  |
| November 24, 2022 | Thursday       | Thanksgiving Day  |
| November 25, 2022 | Friday         | Day after Thanksgiving (Designated Holiday)                           |
| December 23, 2022 | Friday         | ½ Gift Day from President and Chancellor and<br>½ Excused Paid Day PM |
| December 26, 2022 | Monday         | Christmas Day Holiday Observed  |
| December 27, 2022 | Tuesday        | Designated Holiday  |
| December 28, 2022 | Wednesday      | Gift Day #1   |
| December 29, 2022 | Thursday       | Gift Day #2   |
| December 30, 2022 | Friday         | Gift Day #3   |
| January 2, 2023   | Monday         | New Year's Day Holiday Observed                                       |
| January 16, 2023  | Monday         | Martin Luther King, Jr. Day (Designated Holiday)                      |
| May 29, 2023      | Monday         | Memorial Day  |
| June 19, 2023     | Monday         | Juneteenth Day  |

## University of Illinois Payroll Schedule – Academic Professionals 2023

| Pay Year | Work Days | Pay ID | Pay No. | Begin Date | End Date   | Pay Date   |
|----------|-----------|--------|---------|------------|------------|------------|
| 2023     | 21        | MN     | 1       | 12/16/2022 | 1/15/2023  | 1/13/2023  |
| 2023     | 23        | MN     | 2       | 1/16/2023  | 2/15/2023  | 2/16/2023  |
| 2023     | 20        | MN     | 3       | 2/16/2023  | 3/15/2023  | 3/16/2023  |
| 2023     | 22        | MN     | 4       | 3/16/2023  | 4/15/2023  | 4/14/2023  |
| 2023     | 21        | MN     | 5       | 4/16/2023  | 5/15/2023  | 5/16/2023  |
| 2023     | 23        | MN     | 6       | 5/16/2023  | 6/15/2023  | 6/16/2023  |
| 2023     | 21        | MN     | 7       | 6/16/2023  | 7/15/2023  | 7/14/2023  |
| 2023     | 22        | MN     | 8       | 7/16/2023  | 8/15/2023  | 8/16/2023  |
| 2023     | 23        | MN     | 9       | 8/16/2023  | 9/15/2023  | 9/15/2023  |
| 2023     | 20        | MN     | 10      | 9/16/2023  | 10/15/2023 | 10/16/2023 |
| 2023     | 23        | MN     | 11      | 10/16/2023 | 11/15/2023 | 11/16/2023 |
| 2023     | 22        | MN     | 12      | 11/16/2023 | 12/15/2023 | 12/15/2023 |

# STATE UNIVERSITIES RETIREMENT SYSTEM (SURS)

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The State Universities Retirement System (SURS) offers three retirement plan choices:

- Traditional Benefit Plan (Defined Benefit)
- Portable Benefit Plan (Defined Benefit)
- Retirement Savings Plan (Defined Contribution)

It is very important to carefully review the SURS plan options and make an active decision about plan choice. Important considerations for plan selection include: Minimum Vesting, Normal Retirement Age, Earliest Retirement Age, Age Reduction, Final Rate of Earnings (FRE), FRE Limits, and more. A chart is available at [http://surs.org/sites/default/files/pdfsx/Two\\_Tier.pdf](http://surs.org/sites/default/files/pdfsx/Two_Tier.pdf) to assist in evaluating these provisions. Additionally, you will want to consider differences in portability, death benefits, survivor benefits, and retiree health benefits in making your plan choice.

You will receive complete information about these choices directly from SURS. SURS will mail a detailed Choice Packet to your home address after receiving certification of your employment from the University. For additional information about your choices, contact SURS at 800-ASK-SURS (800-275-7877) or visit the SURS website, <https://www.surs.org>, and click on “New to SURS” for resources to help you understand the three plan options. You may also view the “Plan Choice Video Series” at <https://surs.org/plan-choice-video-series>.

As a SURS participant, your contribution to the retirement plan is 8% of gross earnings. University police officers in the Traditional and Portable Benefit Plans contribute 9.5% unless a timely election to waive the right to make additional contributions is made. This contribution is automatically deducted from your paycheck, and is not subject to federal or state income taxes. Federal taxes will be withheld when you begin to withdraw funds following your retirement. Retirement distributions are not taxed by the State of Illinois if taken in accordance with plan provisions, at full retirement age, and while a legal resident of the State of Illinois.

Participation in SURS is required if you work continuously for at least one academic term or four months, whichever is less, and your employment is not temporary, intermittent, or irregular. You are not eligible to participate in SURS if: you are a student regularly attending classes at a college or university that participates in SURS and you are employed on a part-time, temporary basis; you were employed under the Comprehensive Employment Training Act on or after July 1, 1979; you hold a J-1 or F-1 visa and have not established residency status; or you are currently receiving a retirement annuity from SURS.

As a new employee, you have six (6) months from your initial date of SURS-eligible employment to make a lifetime, irrevocable selection of one of the three SURS plans. If you do not make this decision within six (6) months of your date of hire, you will be automatically enrolled in the Traditional Benefit Plan. This “default” enrollment is also IRREVOCABLE for life.

**If you are eligible for SURS, you are not covered by federal Social Security and no Social Security taxes are withheld from your earnings. However, if you were hired on or after April 1, 1986, your earnings are subject to withholding of federal Medicare tax, which amounts to 1.45% of Medicare-eligible salary.**



# RETIREMENT PLANS

## Two-Tiered System – 401(a), non-ERISA

|  | Tier I – Traditional & Portable Plan<br>Members First Employed Before Jan. 1, 2011  | Tier II – Traditional & Portable Plan<br>Members First Employed Jan. 1, 2011 or after   | Tier I & Tier II<br>Retirement Savings Plan   |
|--|---|---|---|
| Employee Contributions                             | 8% of pensionable earnings  | 8% of pensionable earnings  | 8% of pensionable earnings  |
| Minimum Vesting                                    | 5 years of service  | 10 years of service   | 5 years of service  |
| Retirement Age Requirements                        | Age 62, with at least 5 years of service<br>Age 55, with at least 8 years of service<br>(age reduction of 0.5% for each month under age 60 at retirement may apply)<br>At any age, with at least 30 years of service      | Age 67, with at least 10 years of service<br>Age 62, with reduction for age,<br>with at least 10 years of service<br>(age reduction of 0.5% for each month under age 67 at retirement will apply)           | Age 62, with at least 5 years of service<br>Age 55, with at least 8 years of service<br>At any age, with at least 30 years of service<br>Age reduction is not applicable to RSP.  |
| Retirement Benefits                                | Greater of the benefits computed under SURS General Formula, Minimum Annuity calculation and Money Purchase calculation. (The Money Purchase calculation is not available to members who certified on or after 7/1/2005.) | Greater of the benefits computed under SURS General Formula and Minimum Annuity calculation.  | Account established in member name. Member decides how to invest using a variety of investment options including the default option, SURS Lifetime Income Strategy (LIS). Future retirement benefits are based on account balance or the amount of income secured through the LIS at retirement time. |
| Pensionable Earnings/<br>Contribution Limits       | IRS limits apply for members hired after 7/1/1996.<br>FY2021 earnings limit is \$285,000.<br>FY2022 earnings limit is \$290,000.  | Limited to a maximum earnings of \$115,928.92 for FY2021 and \$116,740.42 for 2022. Increases annually thereafter by the lesser of 3% or ½ the Consumer Price Index (CPI) change the preceding year.        | IRS limits apply.<br>FY2021 earnings limit is \$285,000.<br>FY2022 earnings limit is \$290,000.<br>Calendar year 2021 contribution limit is \$58,000.   |
| Final Average Earnings (FAE)                       | Average earnings during 4 highest consecutive academic years or the average of the last 48 months prior to termination (if applicable).   | Average earnings during the 8 highest consecutive academic years of the last 10 or average earnings of the highest 96 consecutive months during the last 120 months of service.                             | Not applicable  |
| FAE Limits   | Limited to 20% year-over-year increases in earnings for years in the FAE period.  | Limited to 20% year-over-year increases in earnings for years in the FAE period.  | Not applicable  |
| Retirement Benefit AAI (Automatic Annual Increase) | 3%, compounded annually.  | Lesser of 3% or ½ the CPI change. Increase is not compounded and is delayed until the later of Jan. 1 following age 67 or Jan. 1 following first anniversary of retirement.                                 | No AAI. However, if you invest in the SURS LIS, you have the potential to benefit from market gains after retirement, which can increase your monthly withdrawal amount.  |
| Survivor Benefits                                  | Eligible Traditional Plan survivor receives minimum of 50% of a member's earned retirement annuity. Portable Plan member benefits may be reduced to provide a benefit to a spouse or contingent annuitant.                | Eligible Traditional Plan survivor receives minimum of 66⅔% of a member's earned retirement annuity. Portable Plan member benefits may be reduced to provide a benefit to a spouse or contingent annuitant. | You can choose to provide a survivor benefit. Your monthly retirement benefit will be reduced to cover the cost of providing a survivor benefit.  |
| Survivor AAI                                       | 3%, compounded annually.  | Traditional Plan increase is calculated using the lesser of 3% or ½ the CPI change. It is not compounded. Portable Plan is 3% compounded annually.  | If a member retires with the SURS LIS and provides a 100% Joint and Survivor benefit, the survivor has the potential to benefit from market gains that could increase the monthly withdrawal amount.  |

Important - Police/Firefighters may qualify for special contribution rates, eligibility requirements and retirement calculations. This chart is only a brief overview and should not be considered a substitute for the information in the SURS Member Guides or the provisions of the law set forth in Articles 1, 15 and 20 of the Illinois Pension Code.

## SUPPLEMENTAL RETIREMENT PLANS

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In addition to your retirement account with SURS, you may elect to direct part of your pay to investments intended to build an individual retirement fund. You may choose to participate in either, or both, the University Supplemental 403(b) Retirement Plan and the State Deferred Compensation 457 Plan.

Participation in either of these plans is optional and does not reduce any U of I System benefits that are based on full salary, such as retirement, life insurance, disability, or survivor benefits. Participation in either option is by payroll deduction only. The amount of income that can be contributed is subject to IRS limitations.

At retirement or termination of employment, you may defer a portion of your vacation payout into either the 403(b) or 457 plan. You must notify UPB at least 60 days prior to separating from the University in order to arrange deferral of vacation payout.

### UNIVERSITY SUPPLEMENTAL 403(B) RETIREMENT PLAN

The 403(b) Plan is a defined contribution plan intended to have tax-favored status under section 403(b) of the IRS Code. A 403(b) plan is similar to a 401(k) plan, but it is specifically designed for employees of public schools and certain tax-exempt organizations. The 403(b) Plan offers fixed and variable annuities, mutual funds, stocks, bonds, and money market funds. The Plan offers a number of funds with low share class fees. You have the option of contributing pre-tax (traditional) and/or Roth (after-tax) funds to the 403(b) Plan.

- Your traditional contributions are deducted from your pay on a pre-tax basis, which decreases your taxable income. Distributions will be taxable as ordinary income.
- Your Roth contributions are deducted from your pay on an after-tax basis. These funds and associated earnings can then be withdrawn tax-free at retirement provided the withdrawal meets certain requirements.
- In 2021, if you are under age 50, the maximum 403(b) contribution is \$19,500. This limit is determined annually by the IRS. If you are age 50 or over, you may contribute up to an additional \$6,500. (This maximum is a combined limit of both traditional and Roth contributions.)
- In August 2021, a streamlined fund menu with lower fees was implemented to help support your financial wellbeing and help you prepare for your retirement goals.

**Important:** If during any calendar/tax year you contribute to a retirement plan through another employer, it is your responsibility to monitor your contributions to all plans to ensure you do not contribute over the IRS maximum allowed each year.

Your investment company choices are TIAA and Fidelity Investments.

For detailed instructions on enrolling, see <https://hr.uillinois.edu/benefits/retirement/403b/sra>.

## STATE DEFERRED COMPENSATION 457 PLAN

The Deferred Compensation Plan is a defined contribution plan intended to have tax-favored status under section 457(b) of the IRS Code. The plan is administered by CMS with T. Rowe Price as recordkeeper and plan service provider. Your contributions, together with any earnings, accumulate tax-deferred until you terminate service, die, or incur unforeseeable financial hardship. Retirement distributions are not taxed by the State of Illinois if taken in accordance with plan provisions, at full retirement age, and while a legal resident of the State of Illinois.

The State of Illinois Board of Investments determines the range of investment choices for the plan. There are a number of investment options, including the target retirement trust funds, which provide a single diversified portfolio that is professionally managed to a specific retirement date.

- The minimum contribution is \$10 per pay period.
- Your traditional contributions are deducted from your pay on a pre-tax basis, which decreases your taxable income. Distributions will be taxable as ordinary income for federal tax purposes.
- Your Roth contributions are deducted from your pay on an after-tax basis. These funds and associated earnings can then be withdrawn tax-free at retirement provided the withdrawal meets certain requirements.

In 2020, if you are under age 50, the maximum contribution is \$19,500. This limit is determined annually by the IRS. If you are age 50 or over, you may contribute up to an additional \$6,500 (This maximum is a combined limit of both traditional and Roth contributions).

For more information about the 457 Plan, see <https://www.hr.uillinois.edu/benefits/retirement/457/>.

To enroll in the Plan, visit [rps.troweprice.com](https://rps.troweprice.com).

### **SURS Deferred Compensation Plan (DCP)**

This is a new 457(b) Savings Plan now available through SURS Employers. Saving and investing in the DCP helps you create income to supplement your other SURS retirement plan's benefits. You save at a rate right for you, up to the IRS annual limits, making pre-tax or Roth contributions or both. You choose among the best-in-class DCP investment lineup, which includes an option that generates guaranteed lifetime income when you retire.

A 457(b) plan is an employer-sponsored, tax-favored retirement savings account. Unlike other retirement plans, a 457(b) plan allows you to withdraw funds without a penalty before the age of 59½, as long as you either leave employment or have a qualifying hardship. You can also withdraw funds while still employed after you reach age 59½. More information can be found here: <https://surs.org/retirement-plans/dcp/>

# DISABILITY PLANS

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## SURS DISABILITY BENEFITS

Disability benefits are provided through your participation in the State Universities Retirement System (SURS). The disability benefits are the same regardless of which of the three SURS retirement plan choices you select.

- Disability benefits may be claimed for an illness after you have accumulated two (2) years of service credit in SURS. This two (2) year requirement is waived if disability is due to an accident.
- Waiting Period: Benefits begin after 60 continuous calendar days of disability, or after salary or sick leave benefits end, whichever is later.
- Benefit Amount: An eligible employee with an approved disability claim would receive the greater of 50% of base salary on the date the disability begins or 50% of average earnings for the 24 months immediately prior to the date disability begins.
- Benefit Duration: Benefits are payable until the total benefits received equal 50% of your SURS earnings.

## UNIVERSITY SUPPLEMENTAL LONG TERM DISABILITY (LTD) INSURANCE PLAN

This optional LTD plan available through Prudential supplements the SURS benefits if you become disabled due to sickness or injury. To be eligible for enrollment in this plan, you must be a SURS participant with a continuing appointment of at least 50% or a temporary appointment of 50% or more for at least nine months and be eligible to receive state health benefits. You pay the full cost of this plan. Monthly premiums are based on your age and your annual salary.

A new benefits eligible employee, will receive guaranteed coverage if election is made within the first 60 days of employment. After 60 days, you may apply for coverage at any time by answering questions about your health. Prudential has the right to approve or deny any request for coverage. If a request is approved, coverage will begin on the date determined by the carrier. A pre-existing condition limitation is applicable during the first two (2) years of coverage.

Benefits under the plan are coordinated with any SURS disability payments so that a total benefit of up to 66.67% of base pre-disability earnings, up to a maximum of \$12,000 per month, is paid.

- Plan pays 66.67% benefits in the first two years of employment when there is no SURS benefits payable for a disability due to illness.
- Plan pays 16.67% benefits once the 50% SURS disability benefit begins.
- Plan pays 66.67% benefits if disability continues after the SURS benefit is exhausted.
- Catastrophic Disability: plan pays 86.67% benefit (additional 20% of monthly earnings up to the \$12,000 maximum) if you lose the ability to perform two activities of daily living or have severe cognitive impairment that requires substantial supervision.
- Critical Illness Benefit: plan pays 76.67% (additional 10% of monthly earnings up to a maximum of \$1,000) if disability is caused by a covered critical illness.
- Survivor Benefit: plan pays a lump sum benefit, equal to six months of gross disability payments, to your beneficiary upon death.

To enroll in the University Supplemental LTD Plan, go to <https://hr.uillinois.edu/benefits/ltd#UniversityLTD>.



# University Code of Conduct

This Code of Conduct establishes guidelines for professional conduct by those acting on behalf of the University including executive officers, faculty, staff, and other individuals employed by the University using University resources or facilities, and volunteers and representatives acting as agents of the University.

This is not an attempt to define specifically what one should and should not do, but to communicate the University's expectations of proper conduct and what professional conduct the University values. It is an expectation that the Code of Conduct serves as the basis, on which, employees should make decisions related to the best interests of themselves, their co-workers and the University. University policies, procedures, and state law serve to reinforce the concepts presented in the Code of Conduct.

## The Code

Those acting on behalf of the University have a general duty to conduct themselves in a manner that will maintain and strengthen the public's trust and confidence in the integrity of the University and take no actions incompatible with their obligations to the University.

With regard to professional conduct, those acting on behalf of the University should practice:

- Integrity by maintaining an ongoing dedication to honesty and responsibility;
- Trustworthiness by acting in a reliable and dependable manner;
- Evenhandedness by treating others with impartiality;
- Respect by treating others with civility and decency;
- Stewardship by exercising custodial responsibility for University property and resources;
- Compliance by following State and Federal laws and regulations and University policies related to their duties and responsibilities;
- Confidentiality by protecting the integrity and security of university information such as student records, employee files, patient records, and contract negotiation documents.

Those acting on behalf of the University shall seek appropriate guidance when faced with ethical dilemmas. For additional information related to ethical dilemmas, please contact the University Ethics and Compliance Office on the Toll-free Ethics Help Line at: 866-758-2146 or via e-mail at: [ethicsofficer@uillinois.edu](mailto:ethicsofficer@uillinois.edu).

# University of Illinois at Urbana-Champaign



## **WELCOME!**

### **TOPICS TO BE COVERED:**

- **POSITIVE TIME REPORTING**
- **ETHICS TRAINING**
- **ECONOMIC INTEREST**
- **CONFLICTS OF INTEREST**

# Positive Time Reporting



## The State Officials and Employees Ethics Act (SOEEA)

- Assures that the U of I is in compliance with the SOEEA Act and all other applicable state laws.
- Requires employees to electronically record time spent on official University business.
- Compliance with this policy is monitored through ongoing internal/external audits and reported annually.
- Employees covered by this policy: U of I Academic Professionals and Civil Service

# Time Reporting Requirements



## For Academic Professional and Exempt Civil Service (**Not eligible for overtime**) Employees

- Must record (to the nearest quarter hour) the total number of hours worked each day on University business.
- Official University business includes business conducted throughout the week, evenings and weekends (i.e. 24 hrs a day, 7 days per week).
- Does not require recording your specific work activities.

# Understanding the difference between...



## Positive Time Reporting

- Report any time spent on University business in quarter-hour increments
- PTR is an independent application (i.e. does not feed into Banner system and has no impact on pay or leave accrual)
- Data is reviewed by the ethics office for compliance purposes only

## Vacation/Sick Leave Reporting

- Report use of vacation or sick time in 4 or 8 hour increments
- Enter usage into electronic reporting system
- ACES HR will obtain usage from electronic system and will enter into Banner (i.e. will affect your official leave accrual report)

# Online Ethics Training



- Ethics Training is a **legal requirement** of the SOEEA to familiarize you with laws, rules, and policies that apply to your ethical conduct as a University (state) employee.
- Failure to complete training will result in the statutorily required reporting of your name to the Exec. Inspector General & penalties will be determined by the Illinois Exec. Ethics Commission.
- Training must be completed each year by all personnel. Training Period is usually during the fall semester.
- There is offline training for individuals who do not have access/do not know how to use a computer.



# Online Ethics Training (cont)



- The program takes **70** minutes to complete and may be completed in segments.
- You are not graded on the number of correct responses and your responses will not be monitored.
- The University Ethics Office will receive an electronic copy of your ethics training upon completion.
- Contact:

University Ethics Office

E-mail: [ethicsofficer@uillinois.edu](mailto:ethicsofficer@uillinois.edu)

Phone: (866) 758-2146 (Toll-free Help Line)

# Annual Filing of Economic Interests



- All personnel (**academic, non-academic, or any other classification of personnel**) employed by the U of I must comply with the Illinois Governmental Ethics Act by **May 1st** of each year.
- U of I employees are required to file annual Statement of Economic Interests if they:
  1. Are or function as the head of a department or other administrative unit; or
  2. Have supervisory authority over, or direct responsibility for the formulation, negotiation, issuance or execution of contracts entered into by the State in the amount of \$5,000 or more; or
  3. Are a Principal Investigator (PI) or Co-PI on a grant; or
  4. Have supervisory responsibility for 20 or more employees



# Annual Filing of Economic Interests (Cont)



- Records are used by the Secretary of State's Office as the basis for mailing the forms to individuals at their home addresses.
- **Penalties:** Failure to file a Statement by May 31<sup>st</sup> shall result in ineligibility for or forfeiture of employment. Financial penalties are assessed for untimely filing.
- Each completed form should be sent to:

University Ethics Office

E-mail: [ethicsofficer@uillinois.edu](mailto:ethicsofficer@uillinois.edu)

Phone: (866) 758-2146 (Toll-free Help Line)

# Policy on Conflict of Commitment and Interest



- If an academic staff member obtains prior written approval to engage in non-University income-generating activities he/she must: disclose such activities annually, whenever a substantial change in such activities occurs, or when required by granting agencies.
- The disclosure form is referred to as an RNUA or Report of Non-University Activities
- **A conflict of commitment** arises when the external activities of an academic staff member are so demanding of time or attention that they interfere with the individual's responsibilities to the University
- **A conflict of interest** occurs when the academic staff member is in a position to advance one's own interests or that of one's family or others, to the University's detriment



# Policy on Conflict of Commitment and Interest (Cont)



- Reports of potential conflicts & remedies are reviewed on each campus by the Vice Chancellor for Research, who is advised by a Conflict Review Committee of three or more academic staff members.
- If remedies mutually satisfactory to the academic staff member and the University are not reached, the University may impose a sanction, subject to appeal.
- Further information is available at:

Office of the Vice Chancellor for Research

[http://www.research.illinois.edu/coi/COI\\_FAQs\\_0911.pdf](http://www.research.illinois.edu/coi/COI_FAQs_0911.pdf)



# Timeline



Jan Feb Mar Apr May June July Aug Sept Oct Nov Dec



**Economic Interest  
Filing Period**  
*April 1 – May 1*



**Online Ethics  
Training Period**  
*Oct 5 – Nov 3*



**Conflict of Interest  
Filing Period**  
*Sept 18 – Oct 2*



**Positive Time Reporting & Vacation/Sick Leave Reporting**  
*All Year*

Follow these steps to access the SOEEA reporting system and for instructions on how to use it.

1. To access the positive time reporting system, go to:  
 Urbana/Springfield/UA Employees - <https://hrnet.uihr.uillinois.edu/PTRApplication/>  
 Chicago Employees - [https://hrnet.uihr.uillinois.edu/ptrapplication/index\\_bl.cfm](https://hrnet.uihr.uillinois.edu/ptrapplication/index_bl.cfm)
2. Log in to the system with your ID and Password (Enterprise or Bluestem, as indicated).

Links to each month for which time can be reported. Tool automatically defaults to current month.

For additional assistance.

Indicates any weeks for which time was not submitted and is overdue. Select the appropriate week to report time for that period.

Automatically defaults to the current week.

Can enter time each day, and click Save. Once the week has been fully entered, click Submit to complete submission of that week's time.

View Time For The Week Starting 09/06/2009

| Time Entry Form       |                 |   |                     |
|-----------------------|-----------------|---|---------------------|
| 09/06/2009            | Sunday Hours    | 0 | Sunday Minutes 0    |
| 09/07/2009            | Monday Hours    | 0 | Monday Minutes 0    |
| 09/08/2009            | Tuesday Hours   | 0 | Tuesday Minutes 0   |
| 09/09/2009            | Wednesday Hours | 0 | Wednesday Minutes 0 |
| 09/10/2009            | Thursday Hours  | 0 | Thursday Minutes 0  |
| 09/11/2009            | Friday Hours    | 0 | Friday Minutes 0    |
| 09/12/2009            | Saturday Hours  | 0 | Saturday Minutes 0  |
| 0 Hours and 0 Minutes |                 |   |                     |

**If changes must be made following the submission of time, click *Edit*, proceed with changes, and resubmit.**

**Edit** - The Edit option will allow you to retract and update a time report that has previously been submitted.

For an example of how an Academic Professional or exempt Civil Service (not eligible for overtime) employee would report all time spent working on official business of the University to the nearest quarter hour, please visit <https://nessie.uihr.uillinois.edu/pdf/policy/UnivBusRptExample.pdf>.

Questions about the Positive Time Reporting system should be directed to your campus/central Human Resources office:

Urbana: 217-244-2400 (Academic Staff); 217-333-3105 (Civil Service Staff)

Chicago: 312-413-4848

Springfield: 217-206-6652

University Administration: 217-333-2600

## The University Reporting Policy for The State Officials and Employees Ethics Act (SOEEA) Reporting Example

The following information provides an example of how an Academic Professional or exempt Civil Service (not eligible for overtime) employee would report all time spent working on official business of the University to the nearest quarter hour. Employees are required to utilize the online reporting tool:

Urbana/Springfield/UA Employees: <https://hrnet.uihr.uillinois.edu/PTRApplication/>  
Chicago Employees: [https://hrnet.uihr.uillinois.edu/ptrapplication/index\\_bl.cfm](https://hrnet.uihr.uillinois.edu/ptrapplication/index_bl.cfm)

In the following example, the employee's payroll day is 8:00 AM to 5:00 PM and his/her scheduled workweek is Monday through Friday. This example assumes that a payroll day covers a period of (9) nine hours. Any meal period, taken during a payroll day, that does not involve official University business, is neutral and will not be counted toward time spent on official University business. The employee's schedule during the week was as follows:

- Sunday: The employee worked from 8:00 AM to 10:00 AM.
- Monday: The employee worked from 8:00 AM until 12:00 PM and from 1:00 PM until 5:00 PM.
- Tuesday: The employee worked from 8:00 AM to 1:15 PM and from 2:15 PM to 5:45 PM.
- Wednesday: The employee worked from 8:00 AM to 12:30 PM and from 1:30 PM to 5:30 PM.
- Thursday: The employee worked from 8:00 AM until 12:45 PM, 1:00 PM until 5:15 PM, and 9:00 PM to 11:00 PM.
- Friday: The employee worked from 8:00 AM until 12:00 PM. (Note: This employee took half of a vacation day from 1:00 PM until 5:00 PM)
- Saturday: The employee worked from 9:00 PM to 11:00 PM.

The employee would enter this information into the online reporting tool as pictured below.

**Current Time Reports**

Select Current Week: 09/06/2009

Enter Time For The Week Starting 09/06/2009

| Time Entry Form   |                 |                                 |   |
|-------------------|-----------------|---------------------------------|---|
| 09/06/2009        | Sunday Hours    | <input type="text" value="2"/>  | Sunday Minutes <input type="text" value="0"/>     |
| 09/07/2009        | Monday Hours    | <input type="text" value="8"/>  | Monday Minutes <input type="text" value="0"/>     |
| 09/08/2009        | Tuesday Hours   | <input type="text" value="8"/>  | Tuesday Minutes <input type="text" value="45"/>   |
| 09/09/2009        | Wednesday Hours | <input type="text" value="8"/>  | Wednesday Minutes <input type="text" value="30"/> |
| 09/10/2009        | Thursday Hours  | <input type="text" value="11"/> | Thursday Minutes <input type="text" value="0"/>   |
| 09/11/2009        | Friday Hours    | <input type="text" value="4"/>  | Friday Minutes <input type="text" value="0"/>     |
| 09/12/2009        | Saturday Hours  | <input type="text" value="2"/>  | Saturday Minutes <input type="text" value="0"/>   |
| <b>Week Total</b> | 44 Hours and    | 15 Minutes                      |   |

**Save** - The Save option will allow you to retain any updates you have made to your time report prior to submitting the information for the week.

**Submit** - The Submit option will allow you to report your time for the week once you have completed the time report and are ready to report the time.

In summary, the employee in this example worked and reported forty-four hours and fifteen minutes on official business of the University and has complied with SOEEA and this policy by reporting his/her time appropriately.