Quarterly
Human Resources
Communication Forum

Thursday, October 26, 2017
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New Staff – Tim Sullivan

• Human Resources Partner
• B.S. Human Resources Management, OSU
• Previously worked at a chemical plant in Claremore
New Staff – Raquelle Parli

• Human Resources Partner
• B.A. in Behavioral Sciences, Adams State University, Colorado
• Former Benefits Specialist at Stillwater Medical Center
Performance Management Training in 2018

Wednesday, January 24, 2018, 10am – 11am, 416 Student Union
Tuesday, February 13, 2018, 2pm – 3pm, 416 Student Union
Thursday, March 22, 2018, 10am – 11am, 416 Student Union
Benefits Update

• Benefit Focus – New Benefits Administration System
• Automate enrollment process
• No premium changes for 2018 health
• 2018 dental, vision, life premiums

Open Enrollment
November 1 – November 17
## Retirement Plan Redesign

### Current Retirement Plans
- **OTR**
  - OSU Contribution 15.55%
  - Employee Contribution 0%
- **OLERS**
  - OSU Contribution 10%
  - Employee Contribution 8%
- **ARP**
  - OSU Contribution 11.5%
  - Employee Contribution 0%

### Key Concerns
- Contribution fairness
- Benchmark
  - Highest in Big 12
- OTR & GASB liability
  - Elimination of 2.5% surcharge
- Replacement ratio
  - Greater in ARP offering

### Proposal
- **OTR**
  - OSU Contribution 8.55%
  - Employee Contribution 7%
- **OLERS**
  - No change
- **ARP**
  - Possible future matching program

**New Employees Only Effective 7/1/2018**
# W-4 and Direct Deposit

Separate here and give Form W-4 to your employer. Keep the top part for your records.

**Employee’s Withholding Allowance Certificate**

<table>
<thead>
<tr>
<th>W-4</th>
<th>Form Department of the Treasury Internal Revenue Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Your first name and middle initial</td>
</tr>
<tr>
<td>2</td>
<td>Last name</td>
</tr>
<tr>
<td>3</td>
<td>Social security number</td>
</tr>
<tr>
<td>4</td>
<td>Home address (number and street or rural route)</td>
</tr>
<tr>
<td>5</td>
<td>City or town, state, and ZIP code</td>
</tr>
<tr>
<td>6</td>
<td>Total number of allowances you are claiming (from line H above or from the applicable worksheet on page 2)</td>
</tr>
<tr>
<td>7</td>
<td>Additional amount, if any, you want withheld from each paycheck</td>
</tr>
<tr>
<td>8</td>
<td>I claim exemption from withholding for 2014, and I certify that I meet both of the following conditions for exemption.</td>
</tr>
<tr>
<td>9</td>
<td>(a) Last year I had a right to a refund of all federal income tax withheld because I had no tax liability, and</td>
</tr>
<tr>
<td>10</td>
<td>(b) This year I expect a refund of all federal income tax withheld because I expect to have no tax liability.</td>
</tr>
<tr>
<td>11</td>
<td>If you meet both conditions, write “Exempt” here.</td>
</tr>
<tr>
<td>12</td>
<td>Date</td>
</tr>
<tr>
<td>13</td>
<td>Employer’s signature (This form is not valid unless you sign it)</td>
</tr>
<tr>
<td>14</td>
<td>Employer’s name and address (Employer: Complete lines 1 and 2 only if sending to the IRS)</td>
</tr>
<tr>
<td>15</td>
<td>Office code (optional)</td>
</tr>
<tr>
<td>16</td>
<td>Employer identification number (EIN)</td>
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For Privacy Act and Paperwork Reduction Act Notice, see page 2.

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**You got paid!**

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**Human Resources**
New Electronic Personnel Action Forms (EPAFJs)

- Exceptions to Normal Pay
- Hourly with End Date
  - http://hr.okstate.edu/Banner HR
ELECTRONIC PERSONNEL ACTION FORMS (EPAFs)

HOW TO GUIDE
Independent Contractors and Employee Types
Open Discussion
THANK YOU!