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WILAM Spotlight

GAYLENE HARGROVE
Accounting Operations Admin. – Office of the Associate Vice President & Controller

Responsibilities:
• Assist A&M and branch campuses with administrative and accounting functions
• Shared Services liaison for A&M campuses

Previous Experience:
• Asst. Bursar, OSU Bursar Office
• Sr. Accountant, OSU Athletics Ticket Office
• Sr. Accountant, OSU Educational Television Services
• Admin Assoc., OSU Arts & Sciences Outreach

Education:
• M.B.A., OSU 1999
• B.S. Accounting, OSU 1993

Other Interesting Facts:
• My favorite thing in the world is being Nana.
• My husband is an old hippie.
• I am an adjunct lecturer for OSU SSB.
• I jumped out of a perfectly good airplane.
• I rode in a hot air balloon over Jackson Hole.
• I saw 10 plays in 7 days in New York City.
• I am a founding member of the Hazel Modella Art Gallery.
• I bought a Harley Davidson on a Saturday and wrecked it that Sunday.
• I am a member of the Stillwater Community Band.
• My dog, Sandy and I are a pet therapy team for Pete’s Pet Posse.

Each month one person will be randomly selected to spotlight as our WILAM Spotlight Employee. **If you haven’t turned your form in yet, please submit it to Lynette Rhea, lynette.rhea@okstate.edu**. Forms can be found [here](http://controller.okstate.edu/).
Taxpayers Alerted Against Falsely Inflated Refunds in ‘Dirty Dozen’ List; Seniors and Many Others at Risk

IR-2018-48, March 12, 2018

WASHINGTON — The Internal Revenue Service warned taxpayers today to be alert to unscrupulous return preparers touting inflated tax refunds. These scam artists frequently prey on older Americans, low-income taxpayers and others with promises of big refunds.

These refund scams remain on the agency’s annual "Dirty Dozen" list of most prevalent tax scams.

Scam artists pose as tax preparers during tax time, luring victims by promising large federal tax refunds. They use flyers, advertisements, phony storefronts or word of mouth to attract victims. They may even make presentations through community groups or churches.

Scammers frequently prey on people who do not have a filing requirement, such as those with low incomes or older Americans. They may also prey on non-English speakers who may or may not have a requirement to file a tax return.

Con artists dupe people into making claims for fictitious rebates, benefits or tax credits. They may also file a false return in their client’s name, and the client never knows that a refund was paid.

Scam artists may also victimize those with a filing requirement who are due a refund. They do this by promising larger refunds based on fake Social Security benefits and false claims for education credits or the Earned Income Tax Credit (EITC) among others.
Taxpayers Alerted Against Falsely Inflated Refunds in ‘Dirty Dozen’ List (continued)

Those perpetrating these scams can see significant penalties and interest and possible criminal prosecution. To protect taxpayers, the IRS Criminal Investigation Division works closely with the Department of Justice to shutdown scams and prosecute the criminals behind them.

Falsely Claiming Zero Wages, Filing Phone Forms W-2, 1099

For years, the IRS has seen a series of contorted and creative efforts by scam artists who try to avoid taxes.

Filing a phony information return, such as a Form 1099 or W-2, is an illegal way to lower the amount of taxes owed. The use of self-prepared, “corrected” or otherwise bogus forms that improperly report taxable income as zero is illegal. So is an attempt to submit a statement rebutting wages and taxes reported by a third-party payer to the IRS.

Some people also attempt fraud using false Form 1099 refund claims. In some cases, individuals have made refund claims based on the bogus theory that the federal government maintains secret accounts for U.S. citizens and that taxpayers can gain access to the accounts by issuing 1099-OID forms to the IRS.

Taxpayers should resist the temptation to participate in any variations of this scheme. The IRS is aware of this scam, and the courts have consistently rejected attempts to use this tax dodge. Perpetrators receive significant penalties, imprisonment or both. Simply filing this type of return may result in a $5,000 penalty.

The IRS sometimes hears about scams from victims worried about losing their federal benefits, such as Social Security, veterans or low-income housing benefits. The loss of benefits comes as a result of false claims being filed with the IRS that provided incorrect income amounts.
Choose Tax Preparers Wisely

Honest tax preparers provide their customers a copy of the tax return they’ve prepared. Scam victims frequently are not given a copy of what was filed. Victims also report that the fraudulent refund is deposited into the scammer’s bank account. The scammers deduct a large “fee” before paying victims, a practice not used by legitimate tax preparers.

The IRS reminds taxpayers that they are legally responsible for what’s on their return even if it was prepared by someone else. Taxpayers who buy into such schemes can end up being penalized for filing false claims or receiving fraudulent refunds.

Taxpayers can help protect themselves by taking some simple steps before choosing a tax preparer. Start with the IRS Directory of Federal Tax Return Preparers with Credentials and Select Qualifications. This tool can help taxpayers find a tax return professional with the right qualifications. The Directory is a searchable and sortable listing of preparers registered with the IRS. It includes the name, city, state and zip code of:

- Attorneys
- CPAs
- Enrolled Agents
- Enrolled Retirement Plan Agents
- Enrolled Actuaries
- Annual Filing Season Program participants

Also check the preparer’s history. Ask the Better Business Bureau about the preparer. Check for disciplinary actions and the license status for credentialed preparers. For CPAs, check with the State Board of Accountancy. For attorneys, check with the State Bar Association. For Enrolled Agents, go to IRS.gov and search for “verify enrolled agent status” or check the Directory.
IRS Release of 2018 Form W-4 and Withholding Calculator

The IRS released the 2018 Form W-4 on Feb. 28, 2018. They have also updated the Withholding Calculator to help employees check their 2018 tax withholding. The withholding calculator is designed to help employees make changes in response to the new law or based on their personal financial situation and gives them the information needed to fill out a new Form W-4. The new withholding tables released earlier this year are designed to produce the correct amount of tax for those with simple tax situations. People with more complex financial situations may benefit from using the withholding calculator. Employees should speak with a tax advisor for advice on completing the Form W-4. Agency personnel should not advise on personal tax matters.

We strongly encourage all employees to check the IRS Withholding Calculator or the 2018 estimated tax liability provided with most tax preparation software.

The new withholding tables released earlier this year are designed to produce the correct amount of tax for those with simple tax situations. This means the new Withholding Tables will likely reduce the annual refund you may be accustomed to receiving, or in some cases, not fully cover your 2018 tax liability.

If you determine you do not have enough being withheld, you can complete a new W-4 for additional withholding.
Retirement Announcement and Reception

Please join us in celebrating the dedicated service and retirement of

Mike Bale
Director of Risk & Property Management

Come and Go Reception
Thursday, March 29, 2018
2:30 pm – 4:00 pm
Willard Hall, Living Room

HAPPY RETIREMENT
Direct Bill on FCM Travel Solutions (Concur)

In order to properly record the transactions from FCM Travel Solutions (Concur) into Banner, it is important that valid trip numbers and Banner chart/fund codes are entered at the time the airline ticket is booked.

Airline tickets should not be purchased in FCM until the out-of-state travel request is approved. The trip number that is assigned to the travel request should be entered in FCM at the time the ticket is booked. Every ticket must contain a valid trip number. It is not acceptable to enter all zeroes or ‘NA’ in the trip number field.

The Banner information that is entered into FCM should consist of the chart code and fund code to be charged for the ticket. The correct format should include a one digit chart code and a six digit fund code. Both should be numeric and should not contain any letters. The organization codes are not needed in FCM.
Red Flag Rules/Identity Theft

According to the U.S. Federal Trade Commission (FTC) the number one consumer complaint is identity theft. Identity theft is the fastest growing crime in the country, according to the credit bureau TransUnion, with almost 10 million incidents a year. In fact, the bureau calculates that every minute, 19 people become victims, and the average cost to the victim is $500 and 30 hours.

We must be vigilant about protecting sensitive information vulnerable to identity theft, and we must be alert to attempts at identity theft. We can’t prevent hackers from attacking technology, but we can educate ourselves with knowledge and habits to keep information safe.

Identity theft is a fraud committed or attempted using the personal identifying information of another person without authority.

A “Red Flag” is a pattern or practice, or specific activity that indicates the possible existence of identity theft.

OSU Policy 3-0540 enables us to be in compliance with Red Flags Rules, which focuses on our need to be alert to and respond to patterns, practices, and activities that signal possible identity theft attempts. Section 5.01: Each University entity with access to personal identification and financial information is required to develop and implement reasonable internal written procedures to comply with the Red Flags Rules as well as other privacy requirements (e.g.; Gramm-Leach-Bliley, FERPA, HIPAA etc.). Departmental policies will be subject to audits. The policies identify red flags, ensure procedures are in place to prevent and detect opportunities, and determine a response to identity theft occurrences.
Red Flag Rules/Identity Theft (continued)

Staff need to take action, report known and suspected fraudulent activity immediately. Protect both students, faculty/staff, and the University from damages and loss:

- Gather all related documentation.
- Provide a complete description of the situation.
- Send the report to: Kathy Elliott, Assoc. VP & Controller 207 Whitehurst.


SCT Bursar Transactions

With the successful implementation of Banner AR, SCTPOSU will no longer be available beginning sometime in mid March. The entire SCT system will be decommissioned over the summer. The SCT bursar transactions will be available in AIRS.

Banner 9

What is Banner 9? Banner 9 is a campus-wide initiative to upgrade our Banner environment to Banner 9. Banner 9 delivers a fresh user experience, all-new tools, and significantly improved capabilities across Banner, providing new efficiencies. Banner 9 is easily compatible with all mobile devices and eliminates browser compatibility issues (you're no longer tied to Internet Explorer).
Banner 9 (continued)

Why did we have to upgrade to Banner 9? Ellucian, the provider of Banner, is moving away from using the INB forms (built from a technology called Oracle forms).

The Banner forms have been rebuilt using modern web technologies such as HTML, CSS, and JavaScript in the Banner 9 forms. Also, the new Banner 9 forms eliminate the need to have Java run inside the web browser.

Banner 9 is just changing the front end of how Banner INB appears. Early May, you will see an updated look to Banner with a few navigation changes. The form names will not change but the format and key strokes will. You will still use the same login process. Training guides are being developed.

Terminology example changes in Banner 9:
Banner INB = Banner AppNav
Form = PAGE
Block = SECTION
Next Block (action) = GO (button)
Rollback (action) = Start Over (button)
Query = FILTER

The preferred browser for using Banner 9 is Chrome or Firefox, both perform better with Banner 9 than Internet Explorer. While you are still accessing INB forms, continue to use Internet Explorer. If you are using Banner functions in both INB and Banner 9:

• Use Internet Explorer with INB
• Use Chrome or Firefox with Banner 9.

Please keep in mind that you can quickly switch between either browser by pressing “Alt + Tab.”
Validated Point-to-Point Encryption (P2PE) Solutions

P2PE is a rather popular term these days in the payments world. But what exactly is P2PE? P2PE or Point-to-Point Encryption is a standard established by the PCI Security Standards Council. A point-to-point encryption solution cryptographically protects account data from the point where a merchant (department) accepts the credit card to the secure point of decryption at the processor.

By using a P2PE solution, merchants are rendering account data (cardholder data and sensitive authentication data) unreadable and devalued. If the merchant was to suffer a data breach, there would not be a loss of actual account data.

There are plenty of solutions on the market, however, only some of solutions are validated by the PCI Security Standards Council as P2PE. Oklahoma State University has contracted with Bluefin Payment Systems to provide you with this service. Here are a few major benefits of switching:

- **Refunding**- when you process a credit card, a token is received by the system. If you need to make a refund at any time, you will search for the credit card transaction in the system and you will be able to process the refund without obtaining the full credit card number.

- **Emailed receipts**- if you put in an email address, it will automatically email a receipt to the customer saving you from having to mail them one. (depending on device).

- **Increased transaction speed**- since the payments will essentially be processed via the internet, they are much faster than the phone line terminals.

- **Recurring payments**- Since a token is stored, you can setup recurring payments to take place monthly, annually, weekly, whenever you want. You can also edit the payment amounts at anytime.
Validated Point-to-Point Encryption (P2PE) Solutions (continued)

- **Paying from stored Cards on file** - If someone wants to pay with a card they have previously used, you can look up the transaction and charge it again for any amount, as long as it was within the last 18 months.

- **Movability** - There are 4 devices available currently and you would not be tied to that specific location as you are with an analog line.

- **Integration** - There is an opportunity for this solution to integrate with current applications.

FIM has been discussing this exciting opportunity with merchant departments over the last few months.

If your department is interested please contact our office and we will schedule a timely meeting with you.

If you have questions, please email pci@okstate.edu or visit www.pcisecuritystandards.org for more information.
EPAFs-Transfer Approval Categories Now Available

Five (5) Transfer approval categories are now available:

- Transfer to Hourly Job with No End Date, TRNJHN
- Transfer to Hourly Job with End Date, TRNJHE
- Transfer to a Salaried Job with No End Date, TRNJSN
- Transfer to a Salaried Job with End Date, TRNJSE
- Transfer to Work Study Job with No End Date, TRNJWN

The EPAFs How To Guide has been updated with step-by-step instructions for these approval categories.

There are a couple of things to keep in mind as you use the Transfer approval categories:

- Before selecting New EPAF from the Electronic Personnel Action Form menu, the Originator will need to select Transfer EPAF Contact List and determine the User Name to be entered in the Routing Queue for the department the employee is transferring from (Approval Level 10 – (DHOUTJ) Dept Head Transfer Out OSU).

The Originator should make a note of the User Name listed in the Transfer EPAF Contact List for the College / Division the employee is transferring from, or leave the list open on his/her computer to refer back to when that information is to be entered in the Routing Queue. Only User Names found on the Transfer EPAF Contact List may be entered for Approval Level 10 – (DHOUTJ) Dept Head Transfer Out OSU.
**EPAFs-Transfer Approval Categories Now Available** (continued)

- After the Employee, Query Date, and Approval Category are entered / selected on the New EPAF Person Selection form, the job the employee is transferring from **AND** the job the employee is transferring to will be selected / entered on the New EPAF Job Selection forms. After the job the employee is transferring from is selected, **Next Approval Type** (not Go) must be selected. After the job the employee is transferring to is selected, **Go** must be selected. Do not select Next Approval Type a second time.

<table>
<thead>
<tr>
<th>Form</th>
<th>Label for Box Containing Job Information</th>
<th>What this means...</th>
<th>After the radio button is selected for the appropriate job, select</th>
</tr>
</thead>
<tbody>
<tr>
<td>First New EPAF Job Selection form</td>
<td>Terminate/End Pay Job Record</td>
<td>Select the position the employee is transferring from</td>
<td>Next Approval Type</td>
</tr>
<tr>
<td>Second New EPAF Job Selection form</td>
<td>Transfer to Hourly Job (or Transfer to Salaried Job)</td>
<td>Select the position the employee is transferring to</td>
<td>Go</td>
</tr>
</tbody>
</table>

After the job the employee is transferring from and the job the employee is transferring to are selected, the Electronic Personnel Action Form will be displayed, and data will be entered for both.

- Although prepared by the Department / College / Division the employee is transferring to, Transfer EPAFs must be approved by the department the employee is transferring from **AND** the department the employee is transferring to before moving forward in the routing process. In the Routing Queue, Approval Level 10 – (DHOUTJ) Dept Head Transfer Out OSU is for the job the employee is transferring from. Approval Level 10 – (DEPTHD) Department Head is for the job the employee is transferring to.

The EPAF How to Guide can be found at:


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**Payroll Services**
Oklahoma State University  
409 Whitehurst  
Stillwater, OK 74078

Phone: 405-744-6372  
Fax: 405-744-4149  
Website: [http://payroll.okstate.edu/](http://payroll.okstate.edu/)
Ok Corral Notice

The OK Corral system automatically sends notifications depending on your Notification Preferences in your Profile. At times you may receive a reminder that something needs to be receipted or invoiced before you have received your items. You can disregard the notification if no action is needed or you can turn those notifications off if you no longer wish to receive them by following the steps below.

In the top Right hand corner of OK Corral, go to your name and under your name choose View My Profile.

Go to Notification Preferences, and choose from the drop down which preferences you wish to edit.
Ok Corral Notice (continued)

In the upper right hand corner, click on Edit Selection

This will allow you to choose how you would like to receive your notifications or to choose to receive no notifications by clicking on the drop down arrow

Purchasing Training Opportunities

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Course</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>May 21, 2018</td>
<td>1:30 PM – 4:30 PM</td>
<td>OK Corral New User Training</td>
<td>403 CLB</td>
</tr>
<tr>
<td>May 22, 2018</td>
<td>9:00 AM – 12:00 PM</td>
<td>Procurement Basics</td>
<td>126 ITLE</td>
</tr>
<tr>
<td>June 19, 2018</td>
<td>1:30 PM – 4:30 PM</td>
<td>Building a Better Bid (Best Value Bid &amp; Specifications)</td>
<td>126 ITLE</td>
</tr>
<tr>
<td>July 16, 2018</td>
<td>1:30 PM – 4:30 PM</td>
<td>OK Corral New User Training</td>
<td>403 CLB</td>
</tr>
<tr>
<td>July 17, 2018</td>
<td>9:00 AM – 12:00 PM</td>
<td>Procurement Basics</td>
<td>126 ITLE</td>
</tr>
<tr>
<td>August 20, 2018</td>
<td>1:30 PM – 4:30 PM</td>
<td>OK Corral New User Training</td>
<td>403 CLB</td>
</tr>
<tr>
<td>September 17, 2018</td>
<td>1:30 PM – 4:30 PM</td>
<td>OK Corral New User Training</td>
<td>403 CLB</td>
</tr>
<tr>
<td>November 19, 2018</td>
<td>1:30 PM – 4:30 PM</td>
<td>OK Corral New User Training</td>
<td>403 CLB</td>
</tr>
</tbody>
</table>
Property Insurance (Buildings & Movable Equipment)

In order to bring insured values closer to what it would really cost to rebuild a damaged structure and replace the contents, OSU will increase the reported insurance replacement values by an average of 10% each year for the next five years.

Newer buildings and buildings which have been significantly remodeled recently will probably not be affected since these buildings reported values were modified to current values during construction/remodeling.

Insurance premiums will most likely increase by at least the same percentage amount. However, the property insurance premiums are affected by numerous other factors such as world-wide loss experience, OSU loss experience, inflation and the financial market.
Associate Vice President & Controller
Oklahoma State University
207 Whitehurst
Stillwater, OK 74078

Phone: 405-744-4188
Email: avpc@okstate.edu
Website: http://controller.okstate.edu/

Financial Information Management
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1202 W. McElroy
Stillwater, OK 74078

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Email: fim@okstate.edu
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Grants & Contracts
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Website: http://gcfa.okstate.edu/

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409 Whitehurst
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Oklahoma State University
113 Student Union
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