FICA Refund Request Form - Instructions
University of Maryland Baltimore

Header Information

Field	Description
Employee name	Enter full name- do not use initials
Empl ID	Enter 6-digit employee identification number
Empl Rcd#	Most employees are record #0 but those with concurrent jobs have a record #1
Empl Class	The Empl Class can be found in the 'Job Information' tab under the Job Data Page
Paygroup	The paygroup can be found in the 'Payroll' tab under the Job Data Page
Employee Title	Enter the Employee Title- can be found in the "Work Location" tab under the Job Data Page
Visa Type	If the employee is a foreign national, enter the current visa type
FICA Refund PP Begin	Enter the 1st pay period the employee should have been exempt from FICA but FICA was charged in error
FICA Refund PP End	Enter the last pay period the employee should have been exempt from FICA but FICA was charged in error
Gross Pay Amount	Enter the total gross pay amount (from begin to end of pay periods FICA should be refunded) should be used to calculate the FICA Exempt amount Note: FICA amount is the sum of OASDI and MED appeared on Paycheck Distribution Page
FICA Amount	Take the gross pay amount x employee FICA rate (7.65%) **OR** Print out the Paycheck Distribution Page(s) for the affected pay period(s), sum up the OASDI/EE and MED/EE (combination of OASDI and MED is the FICA amount)
Dept Name	Enter the department name- may be abbreviated
Last 4 of SSN (OOTC-PS Use)	OOTC-PS will enter employee's last 4 of SSN- Required by CPB

Reason for FICA Refund

Foreign National employee did not complete Glacier timely	Employee must first complete his/her Glacier record, print and attach required forms and documents and submit to the department. After department review, the packet must be sent to OOTC-PS to be processed (follow the Glacier Submission process). If the tax status is not correct in eUMB, it will be corrected based on the submitted Glacier packet. The department cannot submit this request until the tax situation has been corrected. Department can review employee's paycheck to verify if it has been corrected. FICA Refund Request Form can be sent to OOTC-PS with backups: 1. Copy of updated Glacier Tax Summary Report- 1 page only 2. Copy of the paycheck distribution page(s) for each pay period that the FICA taxes (OASDI/EE and MED/EE) were charged

Change of employment retroactively	If an employee is mistakenly charged with FICA due to a retroactive job change, employee or department can request a FICA refund. However, it cannot be requested until the FICA tax situation has been corrected on employee's paycheck. Department can review employee's paycheck to verify. FICA Refund Request Form can be sent to OOTC-PS with backups: 1. Copy of Job Summary to show employment changes 2. Copy of the paycheck distribution page(s) for each pay period that the FICA taxes (OASDI/EE and MED/EE) were charged
Errors made in eUMB/Other	If any errors were made in eUMB causing employee's FICA tax mistakenly withheld, department can request a FICA refund. However, FICA refund cannot be requested until the FICA tax situation has been corrected on employee's paycheck. Department can review employee's paycheck to verify. FICA Refund Request Form can be sent to OOTC-PS with the copy of the paycheck distribution page(s) for each pay period that the FICA taxes (OASDI/EE and MED/EE) were charged.

Employee's current address

Employee's current address	CPB will mail the FICA Refund Check directly to employee. List employee's current address here.

Department Approval

Field	Description
Prepared By Signature/Date	Signature of person for requesting the FICA refund and Date
Printed Name/Title	Printed name and title of person
Phone Number	Preparer's phone number
Signature of AVP/ADean	Signature of AVP/ADean for authorizing the FICA Refund Request
Printed Name/Title	Printed name of the AVP/ADean
FS-Payroll Use	Do not enter information in this area

UMB- OOTC-Payroll Services – Do not enter information in this area