

**Attachment A**  
**Carbondale Campus (including SOM)**  
**Signature of Board Treasurer - Delegation of Authority to Sign**  
**01/12/2024**

| <u>Name</u>       | <u>Title</u>                                  | <u>Department</u>   | <u>Forms Authorized to Sign</u>   | <u>Primary or Secondary Delegation</u> |
|-------------------|---|---------------------|---|--|
| Charlie Cox       | Director<br>ccox@siu.edu                      | Accounting Services | IL Form ST-1, Sales and Use Tax and 911 Surcharge Return  | Primary                                |
|                   |   |                     | IL Form RHM-1, Hotel Operators' Occupation Tax Return   | Primary                                |
|                   |   |                     | IRS Form 1096, Annual Summary and Transmittal of U.S. Information Returns                                 | Primary                                |
|                   |   |                     | IRS Form 1099-MISC, 1099-NEC, 1099-K, 1099-INT and 1099-C   | Secondary                              |
|                   |   |                     | Illinois Form 1099-MISC, 1099-NEC, 1099-K, 1099-INT and 1099-C  | Secondary                              |
|                   |   |                     | IRS Form 8809, Application for Extension of Time to File Information Returns                              | Primary                                |
|                   |   |                     | Other State Sales Tax Forms as needed   | Primary                                |
| Jeff Wright       | Chief Accountant<br>jewright@siu.edu          | Accounting Services | IRS Form 1096, Annual Summary and Transmittal of U.S. Information Returns                                 | Secondary                              |
|                   |   |                     | IRS Form 8809, Application for Extension of Time to File Information Returns                              | Secondary                              |
| Jennifer Nadeau   | Accountant II<br>jnadeau@siu.edu              | Accounting Services | IRS Form 1099-MISC, 1099-NEC, 1099-K, 1099-INT and 1099-C   | Primary                                |
|                   |   |                     | IRS Form 8809, Application for Extension of Time to File Information Returns                              | Primary                                |
|                   |   |                     | IRS Form 1098-C, Contributions of Motor Vehicles, Boats and Airplanes                                     | Primary                                |
|                   |   |                     | Illinois Form 1099-MISC, 1099-NEC, 1099-K, 1099-INT and 1099-C  | Primary                                |
| Brian Kerley      | Accountant III<br>bkerley@siu.edu             | Accounting Services | IL Form ST-1, Sales and Use Tax and 911 Surcharge Return  | Secondary                              |
|                   |   |                     | IL Form RHM-1, Hotel Operators' Occupation Tax Return   | Secondary                              |
|                   |   |                     | Other State Sales Tax Forms as needed   | Secondary                              |
| Jennifer Stillman | Administrative Coordinator<br>jstilmn@siu.edu | Bursar              | IRS Form 1096, Annual Summary and Transmittal of U.S. Information Returns                                 | Primary                                |
|                   |   |                     | IRS Form 1098-T, Tuition Statement  | Primary                                |
|                   |   |                     | IRS Form 8300, Report of Cash Payments Over \$10,000  | Primary                                |
|                   |   |                     | IRS Form 8809, Application for Extension of Time to File Information Returns                              | Primary                                |
| Jill Kirkpatrick  | Bursar<br>kirkpat@siu.edu                     | Bursar              | IRS Form 1096, Annual Summary and Transmittal of U.S. Information Returns                                 | Secondary                              |
|                   |   |                     | IRS Form 1098-T, Tuition Statement  | Secondary                              |
|                   |   |                     | IRS Form 8300, Report of Cash Payments Over \$10,000  | Secondary                              |
|                   |   |                     | IRS Form 8809, Application for Extension of Time to File Information Returns                              | Secondary                              |
| Clay Cochran      | Business/Admin Associate<br>claytonc@siu.edu  | Human Resources     | IRS Form 1094-C, Transmittal of Employer-Provided Health Insurance Offer and Coverage Information Returns | Primary                                |
|                   |   |                     | IRS Form 8809, Application for Extension of Time to File Information Returns                              | Primary                                |
|                   |   |                     | IRS Form 1095-C, Employer-Provided Health Insurance Offer and Coverage                                    | Primary                                |

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|------------------|--|------------------------|---|--|
| Nick Wortman     | Assistant Vice Chancellor of Human Resources<br>nicholas.wortman@siu.edu | Human Resources        | IRS Form 941, Employer's Quarterly Federal Tax Return<br>IRS Form 941-X, Adjusted Employer's Quarterly Federal Tax Return or Claim for Refund<br>IRS Form W-2, Wage and Tax Statement<br>IRS Form W-3, Transmittal of Wage and Tax Statements<br>IRS Form W-3C, Transmittal of Corrected Wage and Tax Statements<br>IRS Form 8809, Application for Extension of Time to File Information Returns<br>IL Form IL-941, Withholding Income Tax Return<br>IL Form IL-941-X, Amended Withholding Income Tax Return<br>IRS Form 1094-C, Transmittal of Employer-Provided Health Insurance Offer and Coverage Information Returns<br>IDES Form UI-3/40, Employer's Contribution and Wage Report<br>CA Form DE-88, Payroll Tax Withholding | Primary<br>Primary<br>Primary<br>Primary<br>Primary<br>Primary<br>Primary<br>Primary<br>Secondary<br>Primary<br>Primary        |
| Unassigned       |  | Human Resources        | IRS Form 941, Employer's Quarterly Federal Tax Return<br>IRS Form 941-X, Adjusted Employer's Quarterly Federal Tax Return or Claim for Refund<br>IRS Form W-2, Wage and Tax Statement<br>IRS Form W-3, Transmittal of Wage and Tax Statements<br>IRS Form W-3C, Transmittal of Corrected Wage and Tax Statements<br>IRS Form 8809, Application for Extension of Time to File Information Returns<br>IL Form IL-941, Withholding Income Tax Return<br>IL Form IL-941-X, Amended Withholding Income Tax Return<br>IDES Form UI-3/40, Employer's Contribution and Wage Report<br>CA Form DE-88, Payroll Tax Withholding  | Secondary<br>Secondary<br>Secondary<br>Secondary<br>Secondary<br>Secondary<br>Secondary<br>Secondary<br>Secondary<br>Secondary |
| Nick Wortman     | Assistant Vice Chancellor of Human Resources<br>nicholas.wortman@siu.edu | Human Resources        | IRS Form 1042, Annual Withholding Tax Return for U.S. Source Income of Foreign Persons<br>IRS Form 1042-T, Annual Summary and Transmittal of Forms 1042-S<br>IRS Form 1042-S, Foreign Person's US Source Income Subject to Withholding  | Primary<br>Primary<br>Primary  |
| Unassigned       |  |                        | IRS Form 13551, Application to Participate in the IRS Acceptance Agent Program  | Primary  |
| Elizabeth Heflin | Accountant II<br>lheflin@siu.edu   | Information Technology | IRS Form 720, Quarterly Federal Excise Tax Return<br>IL Form RT-2, Telecommunications Tax Return<br>IL Form RT-10, Telecommunications Infrastructure Maintenance Fee (TIMF) Return  | Primary<br>Primary<br>Primary  |
| Gail Odaniell    | Administrative Assistant<br>gailo@siu.edu                                | Information Technology | IRS Form 720, Quarterly Federal Excise Tax Return<br>IL Form RT-2, Telecommunications Tax Return<br>IL Form RT-10, Telecommunications Infrastructure Maintenance Fee (TIMF) Return  | Secondary<br>Secondary<br>Secondary  |

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|------------------|---|--|---|--|
| Sue Zamora       | Director<br>susan.zamora@siu.edu  | Procurement Services                           | IRS Form W-9, Request for Taxpayer Identification Number and Certification<br>IL Form CRT-61, Certificate of Resale<br>State Sales Tax Exemptions Requests<br>State Requests for Taxpayer Identification Number, Certification of Tax-Exempt Status, and Withholding Exemptions | Primary<br>Primary<br>Primary<br>Primary |
| Agnes Arnold     | Comptroller<br>aarnold@siumed.edu                                       | School of Medicine's Comptroller's Office      | IRS Form W-9, Request for Taxpayer Identification Number and Certification  | Primary                                  |
| Susan Simmers    | Vice Chancellor for Administration and Finance<br>susan.simmers@siu.edu | Vice Chancellor for Administration and Finance | Property Tax Exemption Requests   | Primary                                  |
| Julie McReynolds | Interim Executive Director for Finance<br>jcima@siu.edu                 | Vice Chancellor for Administration and Finance | Property Tax Exemption Requests   | Secondary                                |
| Rodney Kroenlein | Business Manager<br>rodney.kroenlein@siu.edu                            | Touch of Nature Center                         | LCC, Annual Liquor License Renewal (license # 1A-0005785)   | Primary                                  |
| Sarah Vanvooren  | Director of University Events and Conferences<br>svanvoo@siu.edu        | Events and Outreach-SIUC                       | LCC, Annual Liquor License Renewal (license # 1A-0112206)   | Primary                                  |