Distribution of 2013 Form W-2s
The Payroll Services Department will begin the process of preparing the 2013 W-2 Wage and Tax Statements in January. The Form W-2 is an annual form that reports your Federal and State wages and other tax information required by Federal and State agencies. It is also used by the Social Security Administration as a verification document to ensure individuals are properly credited for future Social Security and Medicare benefits. Your 2013 W-2 will be mailed to the home address on file no later than January 31, 2014.

After you receive your 2013 Form W-2, please verify that your name and Social Security number match your name and Social Security number issued on your Social Security card. The Social Security Administration regards names and Social Security numbers as “critical links” connecting your W-2 data to your lifetime earnings record. Your name and Social Security number must match Social Security Administration’s records. If your name has recently changed, (e.g., due to marriage, divorce, etc.), you will need to contact the Social Security Administration at 1-800-772-1213, or on the internet at www.ssa.gov for a Form SS-5, Application for a Social Security Card. After you have received a new Social Security card, please notify the Human Resource Services Department. Using a new name without updating the Social Security Administration’s records may prevent the posting of your Social Security and Medicare earnings. The district is required to use the name that appears on your Social Security card. If we receive notification from the Social Security Administration that the employee’s name does not match the name on file with the Social Security Administration, we are required to change our records to match the Social Security Administration’s records. This will result in your paychecks being issued to the same name listed on your Social Security card.

PLEASE DO NOT MISPLACE YOUR 2013 FORM W-2
If you need a replacement copy of your 2013 Form W-2 you must complete a replacement request form. You can obtain the replacement request form on the district’s website at www.scusd.edu, under Payroll Services Department, Payroll Forms. Once the form has been received in the Payroll Services Department it will take approximately 10 working days to process.
Forms W-4/DE-4 Employee’s Withholding Allowance Certificate
Please check your Federal and State tax withholding allowances. Did you marry, divorce, gain or lose a
dependent, or have major changes in your family income? If so, you may need to file a new 2012 Form
W-4 or DE-4.

If you are claiming “exempt” from tax withholding you must submit a new Form W-4 and DE-4 by
February 15, 2014, if you wish to renew your exempt status. If a new form is not filed and submitted to
the Payroll Services Department, the withholding for Federal and State taxes will be based on “Single”
with zero (0) withholding allowances. You can obtain both Forms W-4 and DE-4 on the district’s
website at www.scusd.edu, under Payroll Services Department, Payroll Forms.

Tax Sheltered Annuities 403(b) / Tax Deferred Compensation 457
As an employee of the District, you are eligible to participate in a 403(b) and/or 457 deferred retirement
plan. Participation is voluntary and is employee paid, not district paid. MidAmerica (Administrative &
Retirement Solutions, Inc) provides compliance, account transfer signatures, and common remittance
services for the district. Please contact them directly at 1-866-873-4240. Employees who wish to
change deduction amounts will submit salary reduction agreements to MidAmerica via fax at 1-877-513-
2272.

403(b) Plan
This plan permits you to defer taxes voluntarily through salary reduction contributions. Though
commonly referred to as Tax Sheltered Annuities (TSAs), investment options include fixed and variable
annuities as well as custodial mutual fund accounts. Please find the complete list of available 403(b)

457 Plan
This plan permits you to defer taxes voluntarily through salary reduction contributions. This option is
commonly referred to as a “457 Plan.” The available investment options in this plan differ from those
offered under a 403(b). Please contact CalPERS 1-800-260-0659 or AIG Valic 1-800-448-2542 for plan
information.

Beneficiary Designation Information
As noted above, if you have had any changes in your status, it is important that you update your
beneficiary forms. Please contact our office for Designation of Beneficiary forms for district life
insurance, CalSTRS and CalPERS.

Questions
If you have any questions regarding the information contained in this bulletin, please contact your
Payroll Services team:

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<thead>
<tr>
<th>AREA 1</th>
<th>AREA 2</th>
<th>AREA 3</th>
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<tbody>
<tr>
<td>Gabe Estrada</td>
<td>Sandy Kiser-Stodden</td>
<td>Aleks Spisyn</td>
</tr>
<tr>
<td>643-7469</td>
<td>643-2331</td>
<td>643-7466</td>
</tr>
<tr>
<td>Tiffany Snowdon</td>
<td>Emily Hanisits</td>
<td>Tami Mora</td>
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<tr>
<td>643-7470</td>
<td>643-7468</td>
<td>643-7467</td>
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</tbody>
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TT: glm