



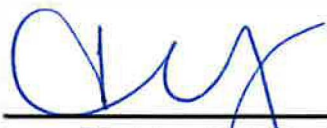
BULLETIN

SUBJECT: 2023 W-2 Distribution **2023-24 NO. BS – 23**

TO: All SCUSD Employees

DATE: December 19, 2023

PREPARED BY: Gabe Estrada, **DEPARTMENT:** Employee Compensation
Employee Compensation Services
Manager II

REVIEWED BY: Cindy Tao, **APPROVED:** 
Director III, Janea Marking, Chief Business
Accounting and Operations Officer
Services

Distribution of 2023 Form W-2s

The Employee Compensation Services Department will begin the process of preparing the 2023 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 2023 W-2 will be mailed to the home address AND electronically uploaded to your MyPortal no later than January 31, 2024.**

After you receive your 2023 Form W-2, please verify that your name and Social Security number matches 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 you need to make an address change, please visit your [MyPortal](#) and make any necessary changes to your address. If you are having a difficulty logging into your account, please visit My [Portal FAQ](#)

If your name has recently changed, (e.g., due to marriage, divorce, etc.), please submit a [Human Resource Service a Name Change Request](#) with all the necessary updated documentation by **Friday, January 12, 2024**. You will also need to contact the Social Security Administration at 1-800-772-1213 or update it on the internet at www.ssa.gov. After you have received a new Social Security card, please bring a copy to 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 paycheck(s) being issued to the same name listed on your Social Security card.

For more information, please visit SSA Q&A: <https://www.ssa.gov/agency/contact/>

PLEASE DO NOT MISPLACE YOUR 2023 FORM W-2

If you need a replacement copy of your 2023 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, [pay-frequently-used-forms/W2](#) Request Form Pay-F008.

Please email the form to payroll@scusd.edu **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 submit a new 2023 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, 2024, 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, [pay-frequently-used-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 it is employee paid, not district paid. The SchoolsFirst provides compliance, account transfer signatures, and common remittance services for the district. Please contact them **directly** at 1-800-462-8328 x4727. Employees who wish to change deduction amounts will contact SchoolsFirst and the information will be submitted to payroll.

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) vendors at the website: www.403bcompare.com.

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, AIG Valic 1-800-633-

8960 or The Hartford 1-800-528-9009 for plan information.

Beneficiary Designation Information

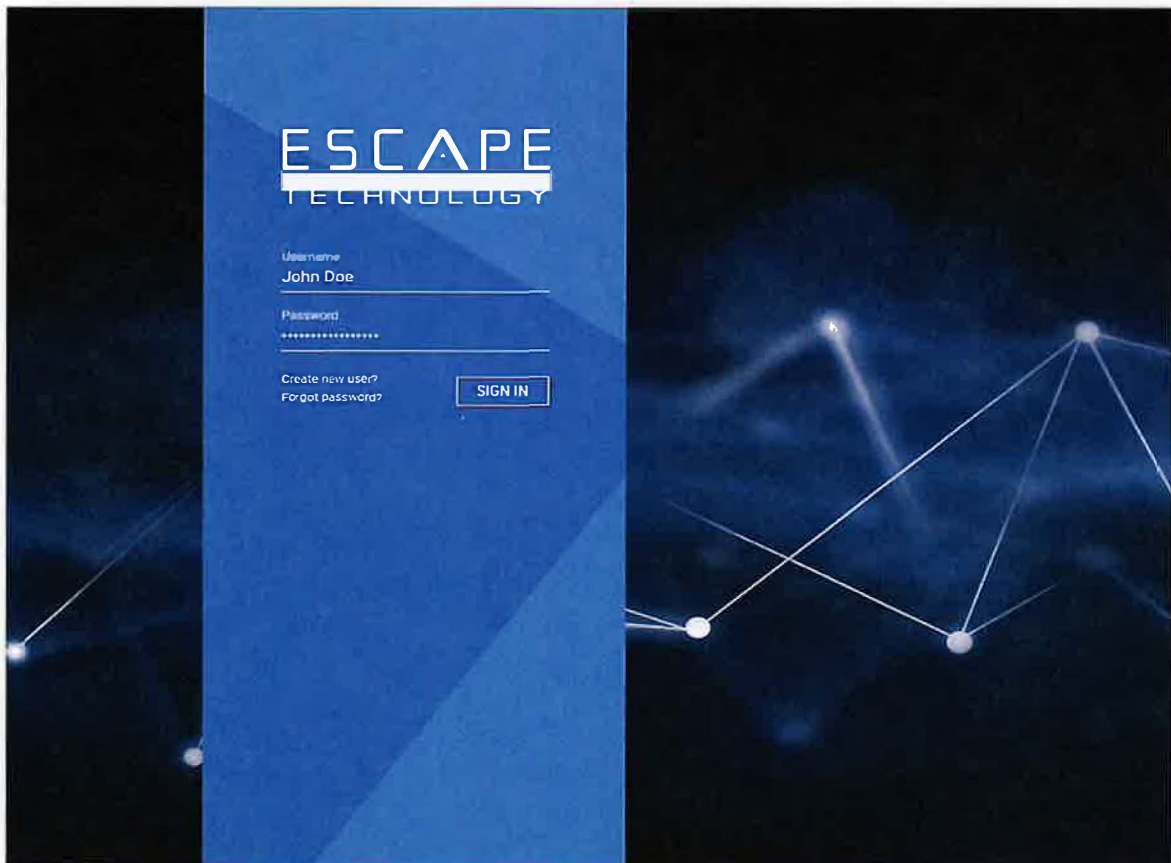
As noted above, if you have had any changes in your status, it is important that you update your beneficiary forms. Please contact our office for Designation of Beneficiary forms for district life insurance, CalSTRS and CalPERS.

Questions

If you have any questions regarding the information contained in this bulletin, please contact your Payroll Services team or email payroll@scusd.edu

AREA 1	AREA 2	AREA 3
Shannon Esparza 643-7491	Aleks Spitsyn 643-7466	Lisa Melendez 643-7467
Sammy Carrillo 643-7468	Connie Van Airsdale 643-7469	Cris Farinias 643-7470

Instructions on downloading your W2 from My Portal are provided below: Log in, [MyPortal](#).



On the Dashboard page, select **My Payroll**

The dashboard shows a sidebar on the left with the following menu items: Dashboard, My Payroll (circled in red), My Information, My Benefits, and Documents. A green arrow points from the top of the page to the 'My Payroll' menu item. The main content area includes a 'Dashboard Alerts' section, a 'Last Paycheck' donut chart showing the breakdown: Net Pay (60.4%), Taxes (24.9%), Pre-Ta (8.7%), and Misc (5.9%). To the right is a 'Pay Dates' calendar for December 2023, with 'TODAY' highlighted on the 14th. Further right are three summary cards: 'VACATION' (307.3465 Hours), 'Sick' (697.5576 Hours), and 'PN' (0 Hours). At the bottom right, there is a 'Strike' section showing 0 hours.

Next, select '**DOWNLOAD**' under W-2's/1095s section

The 'My Payroll' page features a sidebar with 'My Payroll' selected. The main content area includes a 'Payroll History' section with 'Last Pay Period' details: Pay Period 11/01/23 - 11/30/23, Pay Date 11/21/2023, Ending Tax M (0) +\$300.00, and State Tax M (0) +\$125.00. An 'Earnings' donut chart shows: Net Pay \$10,198.51, Taxes \$2,537.24, Pre-Tax Deductions \$888.36, and Misc Deductions \$608.55. A 'Net Pay' summary shows: \$6,164.36. Below this is a 'Recent Paychecks' table with two entries: 11/21/2023 (Gross Pay: \$10,198.51, Net Pay: \$6,164.36) and 10/31/2023 (Gross Pay: \$10,542.80, Net Pay: \$6,414.36). The 'W-2s/1095s' section is highlighted in red in the sidebar, and a green arrow points to the 'DOWNLOAD' button for the 2022 W-2.

This will automatically create a **pdf**. copy of your current W2. You will now have the ability to print.