
W2 REPLACEMENTS (PAY-W101)

Sacramento City Unified School District

1.0 SCOPE:

- 1.1 This work instruction is applied to request a copy of W2.

2.0 RESPONSIBILITY:

- 2.1 Fiscal Services Technician I

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

3.0 APPROVAL AUTHORITY:

- 3.1 Payroll Services Supervisor IV

Authorized Signature on File

4.0 DEFINITIONS:

- 4.1 An employee may request a replacement copy of their W2 form. Sacramento City Unified School District keeps records for three years, the current year and two years prior. This service is provided to all employees at no charge. If an employee requests a duplicate copy for a year that SCUSD does not have on file, refer the employee to the Internal Revenue Service to obtain a copy.

5.0 WORK INSTRUCTION:

- 5.1 If an employee is requesting a copy of their W2 for the current year that they never received, refer them to the appropriate team to first check the returned mail to see if it was returned.
- 5.2 If it was not returned to the Payroll Services Department, verify the address on file is the employee's current address.
- 5.3 Have employee complete the "Request for IRS Form W-2" form (PAY-F008).
- 5.4 All request forms are turned in to the Fiscal Services Technician I. Requests are submitted to the ISET Department on Thursday of every week.
- 5.5 Once copies of W2s are reprinted, they are returned to the Fiscal Services Technician I to send out in the mail or arrange for employee to pick up. This process can take up to 10 working days.

6.0 ASSOCIATED DOCUMENTS:

- 6.1 Request for IRS Form W-2.

7.0 RECORD RETENTION TABLE:

| <u>Identification</u> | <u>Storage</u> | <u>Retention</u> | <u>Disposition</u> | <u>Protection</u> |
|--------------------------|------------------------|--|--|--------------------|
| Request for IRS Form W-2 | File cabinet in office | Two years, current and previous fiscal year. After two years, sent to warehouse. | None. Must keep all payroll records per Internal Audit Department. | Secured Work Area. |

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8.0 REVISION HISTORY:

| <u>Date:</u> | <u>Rev.</u> | <u>Description of Revision:</u> |
|--------------|-------------|--|
| 10/14/04 | A | Initial Release |
| 07/16/07 | B | Correction to Identification in Record Retention Table |

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