



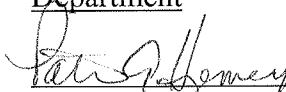
BULLETIN

SUBJECT: W-2s **2011-12 No. AS-29**

TO: All SCUSD Employees

DATE: December 7, 2011

PREPARED BY: Tanisha Turner **DEPARTMENT:** Payroll Services
Department

REVIEWED BY: Patricia A. Hagemeyer **APPROVED:** 

Distribution of 2011 Form W-2s

The Payroll Services Department will begin the process of preparing the 2011 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 2011 W-2 will be mailed to the home address on file no later than January 31, 2012.**

After you receive your 2011 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 2011 FORM W-2

If you need a replacement copy of your 2011 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.**

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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, 2012, 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 it is employee paid, not district paid. The TDS (Tax Deferred Services) Group provides compliance, account transfer signatures, and common remittance services for the district. Please contact them directly at 1-800-542-5849. Employees who wish to change deduction amounts will continue to submit salary reduction agreements 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 CalSTRS 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](tel:1-800-260-0659), AIG Valic [1-800-633-8960](tel:1-800-633-8960) or The Hartford [1-800-528-9009](tel: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:

AREA 1	AREA 2	AREA 3
Gabe Estrada 643-7469	Sandy Kiser-Stodden 643-2331	Aleks Spitsyn 643-7466
Tiffany Snowdon 643-7470	Emily Hanisits 643-7468	Tami Mora 643-7467