



SUBJECT: W-2s **2022-23 NO. BS – 23**

TO: All SCUSD Employees

DATE: January 9, 2023

PREPARED BY: Nai Saelee, **DEPARTMENT:** Employee Compensation
Office Assistant Services
Fiscal Services

REVIEWED BY: Gabe Estrada, **APPROVED:** _____
Interim, Employee Cindy Tao,
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Distribution of 2022 Form W-2s

The Employee Compensation Services Department will begin the process of preparing the 2022 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 2022 W-2 will be either mailed to the home address or electronically delivered to your MyPortal no later than January 31, 2023.**

After you receive your 2022 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 will compare 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 2022 FORM W-2

If you need a replacement copy of your 2022 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 submit a new 2022 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, 2023, 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