



Santa Clara County Office of Education

Charles Weis, Ph.D.
County Superintendent of Schools

Informational Bulletin

For Santa Clara County Districts

District Business & Advisory Services

Nimrat Johal: Director- DBAS: 408-453-6599

Cathy McKim, Manager-DBAS: 408-453-6588

Bulletin: 12-104

Date: February 19, 2012

To: District Fiscal Directors
District Payroll and Human Resource Directors

From: Cathy McKim

Re: 2011 W-2 Form & CD Information- Status Update

The purpose of this bulletin is to provide an update on the status of the misprint on the W-2 forms and the availability of the electronic copies of your district employees W2 forms and reports.

Background Information:

Bulletin 12-097 dated January 30, 2012 advised all districts of the misprint on the Form W-2. The misprint appears in Box 13 (Retirement Plan) and contains an "XX"; but there is no corresponding retirement amount (RET TS) in box 14 (Other). This error appeared for employees who are not CalSTRS or CalPERS members but have received earnings as a Classified or Certificated Hourly/Daily employee during the 2011 calendar year.

Employees who are members of CalSTRS or CalPERS will accurately print the "XX" in Box 13 (Retirement Plan) AND a corresponding retirement amount (RET TS) in box 14 (Other).

We have attempted to reprint the affected W-2 forms; but have learned that this will not be possible. Be advised that in the majority of the cases, there is not a problem with employees filing their taxes; however, any employee requiring assistance can receive a W2-C form with the appropriate boxes marked. Please forward a copy of their original W2 to your service team and we will be happy to assist them.

The electronic copies of the W2 forms are scheduled to be available via cd to your district by February 24th. Until that time, you can request duplicate copies of the original forms from the Technical Services Branch (TSB) (Phone: TSB Helpdesk at 408-453-6748 or E-mail: TSB_helpdesk@sccoe.org)

Please share this information as deemed appropriate.