



# HASD Business Office



## December 2013



### Information on your 2013 W-2



As a reminder, part of the health care reform bill required employers to report the cost of employer sponsored group health coverage beginning with your 2012 IRS Form W-2. This reporting is for informational purposes only. You are not able to claim this health insurance amount on your taxes since premiums are already tax deferred through the District Flex program. Additionally, you will not be taxed on this amount from the IRS. The amount shown on your W-2 will be the

total amount paid by you and by the District on your behalf and appears in Box 12 with the code of DD.

If you have any questions please contact Wendy Wirth @ Ext 17153 or [wendywirth@hasd.org](mailto:wendywirth@hasd.org)



### Changing Financial Institutions?

Because the District uses a direct deposit system for making payroll payments, our payrolls have to be processed 4-5 days before the actual payroll date. Any bank changes need to be to Wendy Wirth at least one week before the

actual payroll date. Please do not close your bank account before notifying Wendy since your bank will not deposit your pay into a closed account.



### EAP (Employee Assistance Program) Newsletters

ThedaCare At Work is providing monthly employee newsletters which can be found on the District webpage under Staff Resources > EAP. These newsletters provide helpful information for you and your family.

The EAP is a benefit sponsored by the District which is designed to assist employees and their family/household members in identifying and resolving personal and/or job related concerns. The EAP offers free

counseling services and provides confidential and professional assistance. The program's goal is to keep valuable employees healthy and productive through prevention, early intervention, and brief solution-focused assistance. Our EAP provider is ThedaCare At Work. Call for free and confidential assistance: (920) 749-2390 or (800) 236-3666.

Business Office contact: Brenda Bergmann @ Ext 17154 or [brendabergmann@hasd.org](mailto:brendabergmann@hasd.org)



*YOU KNOW IT'S  
COLD OUTSIDE  
WHEN YOU GO OUT-  
SIDE AND IT'S COLD.*

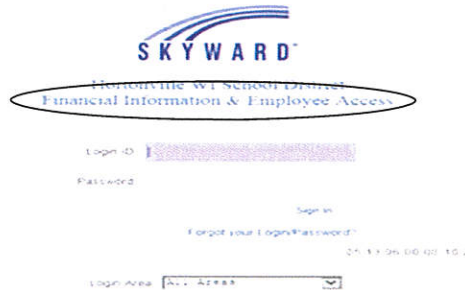


#### In this issue:

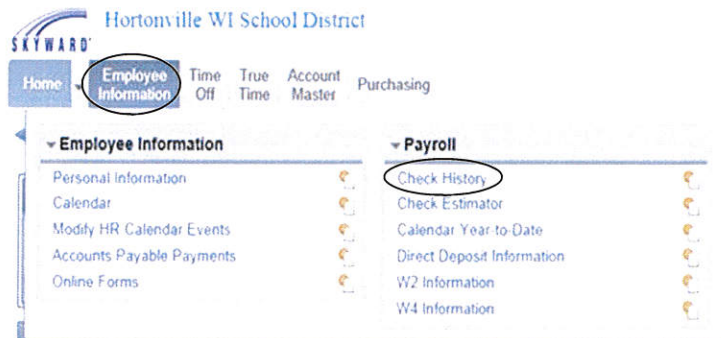
- \* W-2 Information
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## Viewing your Payroll Information with Employee Access

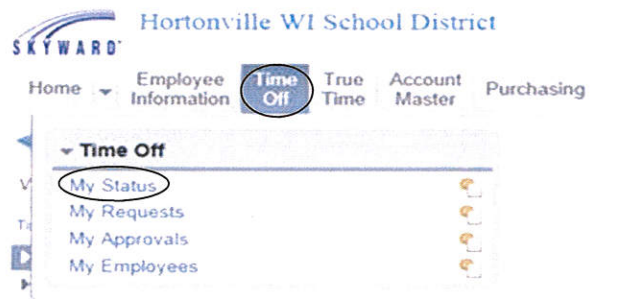
To view your payroll history, make sure you are logging into the correct Skyward website (Employee Access and Student are not the same website). Your login screen should say: Financial Information & Employee Access.



To view checks, log in and click on Employee Information. Under Payroll, go to Check History.



To view your time off information, go to Time Off, My Status



You can then click on the triangle in front of each option to expand and view your history. The Available column is your current balance.

Time Off Code	Prior Year Remaining	Allocated	Used	Remaining	Approved	Waiting	Available
FUNERAL				0h 00m			0h 00m
JURY DUTY				0h 00m			0h 00m
PERSONAL	7h 30m		2h 00m	5h 30m			5h 30m
SICK	523h 00m		5.5 Days	523h 00m			523h 00m
VACATION	15.25 Days		5.5 Days	9.75 Days			9.75 Days



## Wisconsin Retirement System Information



**Variable Fund**—If your Wisconsin Retirement funds are currently being deposited in the Core Retirement Investment Trust (previously called the Fixed Trust) and you would like to switch to the Variable Fund, the Department of Employee Trust Funds must have your election form by January 1, 2014. If the department receives your election form after January 1<sup>st</sup>, your election will not take effect until January 1<sup>st</sup>, 2015. Election forms are available at [etf.wi.gov](http://etf.wi.gov) or on the Business Services page at the following link:

<http://www.hasd.org/businessservices/wisconsinretirement.cfm>

If you make the election to participate in the Variable Fund, 50% of all your future contributions will be deposited in the Variable Trust Fund. The other 50% will be invested in the Core (Fixed) Retirement Investment Trust Fund. Existing contribution balances may not be transferred to the Variable Trust Fund. If you wish to cancel your Variable Fund participation, information can be found at the Department of Employee Trust funds website at <http://etf.wi.gov/>. For more information,

please contact Brenda Bergmann in the Business Office.

**WRS Benefit Presentations, Webinars, and Group Appointments**— Representatives from ETF frequently give presentations at a variety of locations throughout Wisconsin. All members are encouraged to attend an ETF presentation. Statewide benefit presentations, group appointments and webinars offer you an opportunity to ask questions of knowledgeable ETF staff. View upcoming ETF learning opportunities in your area at the ETF website: <http://etf.wi.gov/>

## Expense Reimbursement/Mileage Form

When submitting reimbursement requests, they **must** be accompanied by a completed District reimbursement form with an administrator's signature. After an administrator has approved your expenses, your expense form can be sent directly to Helen Johnson in the Business Office for reimbursement. The forms are located on our network under the administration file. PLEASE USE THE UPDATED FORM ON OUR WEBSITE. The link is:

[www.hasd.org/businessservices/miscellaneousforms.cfm](http://www.hasd.org/businessservices/miscellaneousforms.cfm)  
"2013 Mileage Reimbursement"

Items to keep in mind when submitting reimbursements:

- Print legibly, always print your name
- Turn in the request after the expense is incurred
- Please do not double up on reimbursement requests



Does winter scare you?

Fear of...

...ice—cryophobia

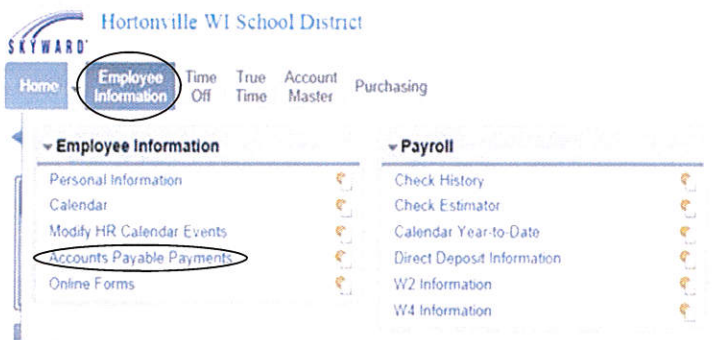
...wind—anraophobia

...snow—chionophobia

...cold—cheimatophobia

## Employee Expense Reimbursement—ACH

When your reimbursement payment for mileage, supplies, etc. has been processed, you will receive an email indicating that a Direct Deposit has been made to your account. To view reimbursements made through accounts payable, go to Employee Information (see previous article—Viewing your Payroll Information With Employee Access) and click on Accounts Payable Payments.



## 403(b)/457(b) Savings Plan



As an employee of the District, you are eligible to start a tax sheltered annuity (TSA). A tax sheltered annuity is an investment plan which may be used to reduce current taxes and invest for retirement. If your deduction is a pre-tax deferral election, you decide on the amount to be deducted from your paycheck and this amount is then deducted from your gross wages. Federal and state taxes are determined on the remaining amount of gross wages. Because gross wages have been reduced, the resulting taxes will also be reduced. You

may also choose a Roth contribution if the plan permits after-tax Roth contributions. Roth contributions are different from before-tax contributions in that Roth contributions are made with after-tax dollars, as opposed to the before-tax dollars. In other words, with the Roth option, you've already paid taxes on the money you contribute. With before-tax deferrals, you pay taxes when you take a distribution. Whether you choose to participate in any of the plans is entirely up to you and can be started at any time. There are two in-

formational pages explaining the 403(b) and 457(b) plans along with a Salary Reduction Agreement on the Business Services page. Please see Brenda Bergmann in the Business Office if you are interested in obtaining more information.

Fund portfolios, summary prospectuses, annual reports, as well as other vendor information can be obtained in the Business Office.



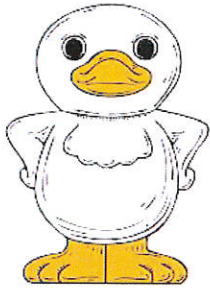
## Flex Spending Update

On October 31, 2013, the IRS modified the long standing "Use or Lose" rule for Health Flexible Spending Accounts (FSAs). This is good news for those employees that will be electing a FSA next year. **Beginning with the District's new plan year (October, 2014),** you will have a safety net in the event that you do not use your entire health FSA election amount by the end of the plan year. **Beginning October, 2014,** you will be able to carryover up to \$500 into the next plan year (2014-15) and use it for expenses incurred during that year. More information will be made available from Diversified Benefit Services in the future regarding this change.





## Winter Walking Safety Tip:



Whether you work indoors or outdoors, you will have to do at least some walking outside. Keep an eye out for ice, and if it's dark outside when you arrive to or leave work (something that is very common in the thick of winter), walk as a duck would walk, as if slightly squatting (to center your balance and walk flat-footed). This will help you avoid slipping and falling. Please WEAR BOOTS! If you encounter icy conditions, please contact either your supervisor/principal or the maintenance department. Other winter safety tips in the workplace can be found at the following website: <http://www.soyouwanna.com/winter-safety-tips-workplace-6600.html>

## Work Related Injuries

Our system for reporting injuries has changed. Currently, any employee injured at work is asked to call Medcor, our injury reporting hot-line. If you have a work-related injury, please report the injury/accident immediately to your supervisor/principal. A call must then be placed to Medcor (800 775-5866). If no supervisor is available, you should contact Medcor directly.

If Injured at Work
Si se lesiona en el trabajo  
1-800-775-5866



## Form W-4

Out here and give Form W-4

**W-4** Employee's W-4

Department of the Treasury

Whether you are entitled to claim certain tax credits

1. Enter your name, first name and middle initial Last name

2. Enter your address, street and apartment or suite number

3. Enter your state and ZIP code

4. Total number of allowances you are claiming from

5. Additional amount, if any, you want withheld from

6. I claim exemption from withholding for 2009, and I

7. Last year I had a right to a refund of all federal

Since you last filed your Form W-4 with our office, did you:

- Marry or divorce?
- Gain or lose a dependent?
- Change your name?

Were there major changes to:

- Your non-wage income (interest, dividends, capital gains, etc.)?

- Your family wage income (you or your spouse started or ended a job)?
- Your itemized deductions?
- Your tax credits?

If you can answer "yes" to any of these questions or you owed extra tax when you filed your last return, you may need to

file a new Form W-4. W-4 forms are available on the HASD Business Office website under District/Business Services/Forms/W-4, follow the link: [www.hasd.org/businessservices/Payroll/w4.pdf](http://www.hasd.org/businessservices/Payroll/w4.pdf) or visit the IRS website ([www.irs.gov](http://www.irs.gov)).



## Welcome to the Business Office

We are happy to welcome Michelle Olson to the Business Office staff! Michelle replaces Tera Mytton who is now working for Waupaca County. Previous to being hired in the Business Office, Michelle had experience in both the banking and insurance industries. You may recognize Michelle, as most recently, Michelle worked in the high school kitchen. Welcome Michelle!

### Business Office:

- Dave Wuebben ..... Ext 17152
- Brenda Bergmann ..... Ext 17154
- Wendy Wirth ..... Ext 17153
- Helen Johnson ..... Ext 17157
- Michelle Olson ..... Ext 17156
- Sherry Sullivan ..... Ext 17158

## Check out the Business Services Page

Our Business Services page is located at: [www.hasd.org/businessservices](http://www.hasd.org/businessservices)  
You will find information regarding payroll, employee benefits, human resources, workers compensation, FMLA, the EAP, etc., as well as the application forms and contact information for our staff.

**HAPPY HOLIDAYS FROM THE BUSINESS OFFICE**