

MEMORANDUM

To: Neenah Joint School District NEA Retirees
From: Jen Carstens, Benefits Coordinator
Re: 2017 Tax Information and 2018 Health Premium Payment Instructions
Date: February 9, 2018

All of the following referenced forms can be found on the [Retiree Information](#) section of the District website. For your convenience, I have created hyperlinks to those forms within this document. You can reach any of the referenced forms by clicking the blue underlined text.

Payment Schedule:

[Stipend Payment Schedule](#) for January 2018 through February 2019 is available.

2017 Tax Information:

By the end of January, those of you being paid your stipend through the NJSD payroll, should have received your 2017 W2.

Also, those receiving their stipend via MidAmerica should have received their 1099R.

Those with MidAmerica, that are continuing to invest their stipend, will receive a 2017 statement of that investment.

In 2017 you paid all of your insurance premiums directly to the District. Please use your payment information when completing your income tax return for 2017.

If you have a High Deductible Health Plan with a Health Savings Account, you will receive Federal Tax forms, from Associated Bank H S A, that show how much was deposited to your H S A account and how much was withdrawn from your account. Please have this available when completing your income tax return for 2017.

Social Security letter:

Also available is a letter for those of you that are under age sixty-five (65) but receiving Social Security (SSA) benefits. You will find an [instruction letter for you](#) and a [letter you can take to the SSA](#) to tell them that your stipend is not current income. Please reference the instruction letter for more information.

Employer Report of Special Wage Payments:

The [Employer Report of Special Wage Payments](#) that the SSA has designed to collect your retiree information is available on the website as well. You may use this instead of the letter (also included on the website) but I will have to fill out the information and sign the form for you. If you get one of these forms from the SSA, please let me know and I can complete it for you.

For those of you that are not receiving SSA benefits, please disregard these materials.

Why isn't there FICA tax taken from my stipend when paid by Neenah Joint School District?

If you retired in 2008, 2009 or 2010, you have prepaid the required FICA tax from the District paid portion of your retirement stipend. You do not owe any FICA tax.

How can I view my payroll from the Neenah Joint School District Skyward system?

If you would like to view your payroll and W2 information online, please go to the Neenah Joint School District website. In the upper right corner of the Home page you will find Staff Resources. Click on Staff Resources and then scroll down the middle of the page to the Skyward Employee Access link.

You will now be on the login page. Your log in ID is the first initial of your first name and full last name all together (example: jcarstens). If you do not have a password, click on "Forgot your Login/Password" to reset your password. If you have any problems with this, please contact me or Janet Linke in HR.

For you to use if you wish to change something:

1) For NJSD stipend payment Retirees only –

- [W-4 Federal Tax Withholding](#) form
- [WT-4 State Tax Withholding](#) form
- [Direct Deposit Authorization](#) form (for changes in financial institution)

2) For ALL NJSD retirees –

- [MetLife Life Beneficiary Designation](#) form (for updating your beneficiary)
 - *As of January 1, 2016 NJSD change the carrier for our life insurance policies. There is nothing you have to do because of this change except be aware that your policy is now a MetLife policy instead of Anthem. All values remain the same but the premium did go down for those that pay their life premium.*
- [Payment Instructions for the NJSD Web Store](#) for premium payments

You do not have to complete these forms if you have no changes.

The NJSD Retiree Information page on the NJSD website (Neenah.k12.wi.us) is updated for 2018. To access the Retiree Information page, login to the Neenah Joint School District website, click on Staff Resources and scroll down to Retiree Information. There will be information and forms available to you there.

If you have any questions concerning this information, please contact me via email or by phone at jennifer.carstens@neenah.k12.wi.us or (920)751-6800 ext. 10108.