

SAN MARCOS UNIFIED SCHOOL DISTRICT

Thank you for applying as a Substitute Teacher for the San Marcos Unified School District!

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Please complete ALL documents included in the new-hire packet, and be certain to sign and date all pages, as needed.

PLEASE DO NOT PRINT DOUBLE SIDED

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Please email your complete New-Hire Packet to ashley.gagnon@smusd.org.

THESE ARE THE REQUIRED ITEMS TO SEND:

- ✓ Your **COMPLETED** New-Hire Packet
- ✓ **PHOTOCOPY** of **Signed** Social Security Card (no exceptions)
- ✓ **PHOTOCOPY** of Valid Driver's License
- ✓ **PHOTOCOPY** of TB test results
- ✓ **PHOTOCOPY** of Mandated Reporter Training Certificate
(emailed to you after completion)

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PRE-EMPLOYMENT PROCESSING

*Send all requested items listed above to Ashley Gagnon
by the DEADLINE (provided on email generated from Edjoin.org)*

*Upon receipt, you will be invited to our New Hire Orientation
(time and date to be provided when all required documents have been received)*

Ashley Gagnon
ashley.gagnon@smusd.org
760-290-2840
Human Resources and Development
255 Pico Ave, Suite 293
San Marcos, CA 92069

SAN MARCOS UNIFIED SCHOOL DISTRICT MEMORANDUM

TO: ALL NEW EMPLOYEES
FROM: HUMAN RESOURCES
RE: TUBERCULOSIS (TB) TESTS

Per Board Policy 4112.4 – no person shall be employed initially unless he/she has submitted to a tuberculosis examination within the past 60 days.

It is the legal requirement of every School District employee, regular or substitute, to have a Tuberculosis (TB) test taken in the State of California before they begin work. Certification of a negative skin test is required. If your skin test is positive, a clear X-Ray certification will also be required.

Please note that a TB test is a two part process:

1. Skin Test
2. Return in 48 hours for reading

You may have your TB test taken at any location of your choosing.

The cost for a TB Skin Test is your responsibility, and the price can vary.

An additional fee may be applicable if it is necessary for you to see a Doctor at the facility.

Chest X-Ray costs are separate, and X-Rays are only given when requested by a Doctor. The cost of Chest X-Rays, if required, is your responsibility.

For your convenience, we have listed a few local facilities below.

LOCATIONS:

Concentra Medical Center

740 Nordahl Road, Suite 131
San Marcos, CA 92069
Phone: 760-432-9000

Palomar Health

120 Craven Road, Suite 207
San Marcos, CA 92069
Phone: 760-510-7373

San Marcos Health Center

150 Valpreda Rd.
San Marcos, CA 92069
Phone: 760-736-6767

Escondido Community Clinic

460 N. Elm St.
Escondido, CA 92025
Phone: 760-737-2000

Work Partners Occupational Health Specialists

2365 S. Melrose Drive
Vista, CA 92081
Phone: 760-571-5910



SAN MARCOS UNIFIED SCHOOL DISTRICT
 California School Employee Tuberculosis (TB) Risk Assessment Questionnaire
 (for Pre-K, K-12 schools and community college employees, volunteers and contractors)

Employee Name: _____ Date of Birth: _____

Site: _____ Employee ID #: _____

Date of Risk Assessment (date you are completing this form): _____

History of Tuberculosis Disease or Infection (Check appropriate box below)

YES – If there is a documented history of positive TB test or TB disease, then a symptom review and chest x-ray (if none performed in the previous 6 months) should be performed at initial hire by a physician, physician assistant, or nurse practitioner. If the x-ray does not have evidence of TB, the person is no longer required to submit to a TB risk assessment or repeat chest x-rays.

NO – Assess for Risk Factors for Tuberculosis using box below.

TB testing is recommended if any of the 3 boxes below are checked

One or more sign(s) or symptom(s) of TB disease – TB symptoms include prolonged cough, coughing up blood, fever, night sweats, weight loss, or excessive fatigue.

Birth, travel, or residence in a country with an elevated TB rate for at least 1 month (since last TB test or TB Risk Assessment Questionnaire completed). Includes countries other than the United States, Canada, Australia, New Zealand, or Western and Northern European countries.

Close contact to someone with infectious TB disease (since last TB test or TB Risk Assessment Questionnaire completed).

DO NOT WRITE BELOW THIS LINE – FOR DISTRICT USE ONLY

Certificate of Completion – Tuberculosis Risk Assessment*

The above named employee has submitted to a tuberculosis risk assessment. The patient does not have risk factors, or if tuberculosis risk factors were identified, the patient has been examined and determined to be free of infectious tuberculosis.

San Marcos Unified School District	School Nurse
<small>Health Care Provider Name</small>	<small>Title</small>
255 Pico Avenue, PD-3	San Marcos CA 92069
<small>Address</small>	<small>City State Zip Code</small>
760-290-2556	760-290-2552
<small>Telephone</small>	<small>Fax</small>

School Nurse Signature Date

* To satisfy job-related requirements in the California Education Code, Sections 49406 and 87408.6 and the California Health and Safety Code, Sections 1597.055, 121525, 121545 and 121555.



**San Marcos Unified School District
Human Resources and Development
NEW HIRE / EMERGENCY INFORMATION**

Last Name				First Name			Middle	
Street Address								
City								
			State			Zip		
Home Phone			Cell Phone					
Social Security Number				Date of Birth				
Email Address								

Frontline Absence and Substitute Login: Use Home Phone Use Cell Phone

.....

Name of Emergency Contact				Relation	
Contact Home Phone			Contact Cell Phone		
Contact Complete Address					
Signature				Date	

HR USE ONLY					
Position			Orientation Date		
Employee #			Requisition #		
Credential Type				Expiration Date	
Credential Type				Expiration Date

DL SS TB/ Exp. Date _____ Clearinghouse Verified DB PS

Frontline Agenda I-30 Faxed Married Single Male Female

Ethnicity _____ Cal**STRS**: Yes No Cal**PERS**: Yes No

Salary \$ Added to Credential List

SAN MARCOS UNIFIED SCHOOL DISTRICT

www.SMUSD.org



SAN MARCOS
UNIFIED SCHOOL DISTRICT
Engaging Students...Inspiring Futures

Home Students Parents Staff About Us Departments Schools Calendar
Coronavirus (COVID-19) #MondayFunday Enrichment Menu Parent Resources
Technology Resources Staff PD

San Marcos Unified / Departments List / Human Resources and Development / HR Documents

Human Resources and Development

HR DOCUMENTS

Welcome

Absences/Substitute Management

Salary Schedules

Annual Notification Packet

[2019-2020 Certificated Salary Schedule.pdf](#)
[2019-2020 Certificated Salary Schedule \(Effective January 1, 2020\)](#)
[2019-2020 Classified Salary Schedule.pdf](#)

Benefits

[2019-2020 Classified Salary Schedule \(Effective January 1, 2020\)](#)

Certificated Personnel

[2019-2020 Administrative Salary Schedule.pdf](#)
[2019-2020 Administrative Salary Schedule \(Effective January 1, 2020\)](#)

Classified Job Descriptions

Master Contracts

Classified Personnel

[SMUSD/CSEA Master Contract 2018-2021](#)
[SMUSD/SMEA Master Contract July 1, 2018 - June 30, 2021](#)

Employment Opportunities

Staff Documents

HR Documents

[Address/Phone/Name Change Form](#)
[Certificated Grievance Form](#)

HR Staff List

Non-Classified, Short Term Personnel

→ [Employee Handbook 2020-21.pdf](#)
→ [Notice of Separation from Employment \(Resignation/Retirement\)](#)

Substitute Classified Personnel

→ [Employee Use of Technology](#)
→ [Safety Manual](#)

Substitute Teacher (Certificated)

→ [Substitute Teacher Handbook](#)
→ [Calendar 2019-2020](#)

Access the SMUSD website at:

www.SMUSD.org

1. Under "SITE SHORTCUTS" in the left column, select "Human Resources"
2. Click on "HR Documents" on the left side of the page

Review:

- Safety Manual
- Substitute Teacher Handbook
- Employee Handbook
- Mandated Reporter Training

SMUSD POLICY ACKNOWLEDGEMENT

I understand that I am legally obligated to review the following:

- ★ Employee Handbook
- ★ Employee Use of Technology
- ★ Safety Manual
- ★ Substitute Teacher Handbook

on the San Marcos Unified School District website:
www.SMUSD.org

I understand how to access and have reviewed the district policies / documents listed above

Employee Name (please print)

Employee Name (please print)

Employee Signature

Date

SAN MARCOS UNIFIED SCHOOL DISTRICT
BOARD POLICY

HUMAN RESOURCES AND DEVELOPMENT

EMPLOYEE USE OF TECHNOLOGY

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The Governing Board recognizes that technological resources enhance employee performance by offering effective tools to assist in providing a quality instructional program; facilitating communications with parents/guardians, students, and the community; supporting District and school operations; and improving access to and exchange of information. The Board expects all employees to learn to use the available technological resources that will assist them in the performance of their job responsibilities. As needed, employees shall receive professional development in the appropriate use of these resources, including the Online Digital Citizenship Professional Development. The use of District Technology is a privilege permitted at the District's discretion and is subject to the conditions and restrictions set forth in applicable Board Policies, Administrative Procedures, and this Responsible Use Agreement.

Employees shall be responsible for the appropriate use of technology and shall use District technology primarily for purposes related to their employment.

District technology includes, but is not limited to, computers, the District's computer network including servers and wireless computer networking technology (Wi-Fi), the Internet, email, USB drives, wireless access points (routers), tablet computers, smartphones and smart devices, telephones, cellular telephones, personal digital assistants, pagers, MP3 players, wearable technology, online collaboration, file storage services, any system or program owned, managed or licensed by the District, any wireless communication device including emergency radios, and/or future technological innovations, whether accessed on or off site or through District-owned or personally owned equipment or devices.

Responsible Uses of District Technology

The Superintendent or designee shall establish a Responsible Use Agreement which outlines employee obligations and responsibilities related to the use of District technology. Upon employment and whenever significant changes are made to the District's Responsible Use Agreement, employees shall be required to acknowledge in writing that they have read and agreed to the Responsible Use Agreement.

Employees shall not use District technology to access, post, submit, publish, or display harmful or inappropriate matter that is threatening, obscene, disruptive, sexually explicit, or unethical or that promotes any activity prohibited by law, Board policy, or administrative regulations.

Prohibited Uses of District Technology

Harmful matter includes matter, taken as a whole, which to the average person, applying contemporary statewide standards, appeals to the prurient interest and is matter which depicts or describes, in a patently offensive way, sexual conduct and which lacks serious literary, artistic, political, or scientific value for minors. (Penal Code 313)

Annual Notifications

The Superintendent or designee shall ensure that all District computers with Internet access have a technology protection measure that protects against access to visual depictions that are obscene, child pornography, or harmful to minors and that the operation of such measures is enforced. The Superintendent or designee may disable the technology protection measure during use by an adult to enable access for bona fide research or other lawful purpose. (20 USC 7131; 47 USC 254)

The Superintendent or designee shall annually notify employees in writing that they have no reasonable expectation of privacy in the use of any equipment or other technological resources provided by or maintained by the District, including, but not limited to, computer files, email, text messages, instant messaging, and other electronic communications, even when provided their own password. To ensure proper use, the Superintendent or designee may monitor employee usage of District technology at any time without advance notice or consent and for any reason allowed by law.

In addition, employees shall be notified that records maintained on any personal device or messages sent or received on a personal device that is being used to conduct District business may be subject to disclosure, pursuant to a subpoena or other lawful request.

Employees shall report any security problem or misuse of District technology to the Superintendent or designee.

Inappropriate use of District technology may result in a cancellation of the employee's user privileges, disciplinary action, and/or legal action in accordance with law, Board policy, and administrative regulation.

Legal Reference:

EDUCATION CODE:

52295.10-52295.55 Implementation of Enhancing Education Through Technology grant program

GOVERNMENT CODE

3543.1 Rights of employee organizations

6250-6270 California Public Records Act

PENAL CODE

502 Computer crimes, remedies

632 Eavesdropping on or recording confidential communications

VEHICLE CODE

23123 Wireless telephones in vehicles

23123.5 Mobile communication devices; text messaging while driving

23125 Wireless telephones in school buses

UNITED STATES CODE, TITLE 20

7101-7122 Student Support and Academic Enrichment Grants

7131 Internet safety

6751-6777 Enhancing Education Through Technology Act, Title II, Part D, especially;

6777 Internet safety

UNITED STATES CODE, TITLE 47

254 Universal service discounts (E-rate)

CODE OF FEDERAL REGULATIONS, TITLE 47

54.520 Internet safety policy and technology protection measures, E-rate discounts

COURT DECISIONS

City of San Jose v. Superior Court (2017) 2 Cal.5th 608

City of Ontario v. Quon et al. (2010) 000 U.S. 08-1332

Management Resources:

WEB SITES

CSBA: <http://www.csba.org>

American Library Association: <http://www.ala.org>

California Department of Education: <http://www.cde.ca.gov>

Federal Communications Commission: <http://www.fcc.gov>

U.S. Department of Education: <http://www.ed.gov>

Adoption History:

Initial Review: 9/18/18

Approved: 10/16/18

SAN MARCOS UNIFIED SCHOOL DISTRICT
EXHIBIT

HUMAN RESOURCES AND DEVELOPMENT

EMPLOYEE USE OF TECHNOLOGY

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**RESPONSIBLE USE AGREEMENT AND RELEASE OF DISTRICT FROM LIABILITY
(EMPLOYEES)**

The San Marcos Unified School District authorizes District employees to use technology owned or otherwise provided by the District as necessary to fulfill the requirements of their position. The use of District technology is a privilege permitted at the District's discretion and is subject to the conditions and restrictions set forth in applicable Board policies, administrative procedures, and this Responsible Use Agreement. The District reserves the right to suspend access at any time, without notice, for any reason.

The District expects all employees to use technology responsibly in order to avoid potential problems and liability. The District may place reasonable restrictions on the sites, material, and/or information that employees may access through the system.

The District makes no guarantee that the functions or services provided by or through the District will be without defect. In addition, the District is not responsible for financial obligations arising from unauthorized use of the system.

Each employee who is authorized to use District technology shall sign this Responsible Use Agreement at least once as an indication that he/she has read and understands the agreement, and will acknowledge each year in the Annual Notification Packet.

Definitions

District technology includes, but is not limited to, computers, the District's computer network including servers and wireless computer networking technology (Wi-Fi), the Internet, email, USB drives, wireless access points (routers), tablet computers, Smartphones, telephones, cellular telephones, personal digital assistants, pagers, MP3 players, wearable technology, any wireless communication device including emergency radios, and/or future technological innovations, whether accessed on or off site or through District-owned or personally owned equipment or devices.

Employee Obligations and Responsibilities

Employees are expected to use District technology safely, responsibly, and primarily for work-related purposes. Any incidental personal use of District technology shall not interfere with District business and operations, the work and productivity of any District employee, or the safety and security of District technology. The District is not responsible for any loss or damage incurred by an employee as a result of his/her personal use of District technology.

The employee in whose name District technology is issued is responsible for its proper care and use at all times. Employees shall not share their assigned online services account information, passwords, or other information used for identification and authorization purposes, and shall use the system only under the account to which they have been assigned to ensure the

confidentiality of both staff and students. Password should be changed regularly to ensure proper security. Employees shall not gain unauthorized access to the files or equipment of others, access electronic resources by using another person's name or electronic identification, or send anonymous electronic communications. Furthermore, employees shall not attempt to access any data, documents, emails or programs in the District's system for which they do not have authorization.

Employees are prohibited from using District technology for improper purposes, including, but not limited to, use of District technology to:

1. Access, post, display, or otherwise use material that is discriminatory, defamatory, obscene, sexually explicit, harassing, intimidating, threatening, or disruptive or that could be construed as harassment or disparagement of others based on their race, ethnicity, national origin, sex, gender, sexual orientation, age, disability, religion, or political beliefs.
2. Disclose or in any way cause to be disclosed confidential or sensitive District, employee, or student information without prior authorization from a supervisor.
3. Send/transmit, download, upload, or post messages that may be considered physically, sexually, or verbally threatening or harassing via text, email, comment, or post.
4. Engage in personal commercial or other for-profit activities without permission of the Superintendent or designee.
5. Engage in unlawful use of District technology for political lobbying.
6. Infringe on copyright, license, trademark, patent, or other intellectual property rights.
7. Intentionally disrupt or harm District technology or other District operations (such as destroying District equipment, placing a virus on District computers, adding or removing a computer program without permission, changing settings on shared computers).
8. Install unauthorized software.
9. Engage in or promote unethical practices or violate any law or Board policy, administrative regulation, or District practice.
10. Degrade or disrupt equipment or system performance (including, but not limited to, inappropriate downloads, streaming, or other activities).
11. Invade the privacy of another.
12. Access, create, post, submit, publish, display, transmit, or otherwise use material that could be used in the production of destructive devices.
13. Develop any classroom or work-related web sites, blogs, forums, or similar online communications representing the District or using District equipment or resources without permission of the Superintendent or designee. Such sites shall be subject to rules and guidelines established for District online publishing activities including, but not limited to, copyright laws, privacy rights, and prohibitions against obscene, libelous, and slanderous content. Because of the unfiltered nature of blogs, any such site shall include a disclaimer that the District is not responsible for the content of the messages. The District retains the right to delete material on any such online communications.

Privacy

Since the use of District technology is intended for use in conducting District business, no employee should have any expectation of privacy in any use of District technology.

The District reserves the right to monitor and record all use of District technology in accordance with applicable law, including, but not limited to, access to the Internet or social media, communications sent or received from District technology, or other uses within the jurisdiction of the District. Such monitoring/recording may occur at any time without prior notice for any legal purposes including, but not limited to, record retention and distribution and/or investigation of improper, illegal, or prohibited activity. Employees should be aware that, in most instances, their use of District technology (such as web searches or emails) cannot be erased or deleted.

All passwords created for or used on any District technology are the sole property of the District. The creation or use of a password by an employee on District technology does not create a reasonable expectation of privacy.

Personally Owned Devices

If an employee uses a personally owned device to access District technology or conduct District business, he/she shall abide by all applicable Board policies, administrative regulations, and this Responsible Use Agreement. Any such use of a personally owned device may subject the contents of the device and any communications sent or received on the device to disclosure pursuant to a lawful subpoena, public records request, or other lawful request.

Records

Any electronically stored information generated or received by an employee which constitutes a District or student record shall be classified, retained, and destroyed in accordance with BP/AR 3580 - District Records, BP/AR 5125 - Student Records, and/or other applicable policies and regulations addressing the retention of District or student records.

Appropriate Use of Digital Tools and Resources

Employees whose duties include supervision of students are expected to provide reasonable supervision and instruction to students under their authority when the students are using District Technology per Board policies, administrative regulations, and other authorities, to monitor students' compliance with their responsibilities under the Student Responsible Use Agreement.

Teachers who are engaged with students in electronic forms of communication are encouraged to follow standard District guidelines for professional conduct as outlined in the SMUSD Employee Handbook in the Employee Conduct section. When communicating with students, keep in mind that the time of day, cultural differences, use of informal language or acronyms all can contribute to the interpretation of appropriate contact. Obtaining parental permission for contact, copying parents on messages, and setting hours of contact can all contribute to professional standards for communication with students. It is recommended that staff utilize

District-owned accounts for electronic communications with students, such as a District-issued email account.

Copyrighted software or data may not be placed on any system connected to the District's system(s) without permission from the holder of the copyright. Only the owner(s) or individuals specifically authorized may upload copyrighted material to the system(s). No teacher/staff member is authorized to perform maintenance or software installations on any District equipment without permission. Staff members wishing to use personal computers on campus, must verify that equipment is running appropriate and updated virus protection. Equipment not running up-to-date anti-virus software may be blocked from the network until it complies. The school district will not provide technical support for personal property, nor will the District install any District-owned software on personal property, or be responsible for problems related to such use.

Responsible Use of District Mobile Devices and Loaner Equipment

Staff members are expected to uphold reasonable standards of care and security to ensure the safety of loaner equipment. This would entail protecting it from damage from food or drink; and securing the equipment in a locked cabinet or desk when not in use. Staff are allowed to use mobile devices off campus, however, they may be responsible for replacement should the equipment be lost, damaged, or stolen when off campus. If transported, it is the employee's responsibility to keep equipment safe and free from damage. This includes locking devices out of sight, in the trunk of your vehicle and not leaving equipment in environments that can cause damage (e.g. hot vehicles, direct sun, moisture, etc.) Equipment is not to be loaned to another staff member, student or family member.

Repairs are to be done by certified District personnel only. Replacements are to be obtained through the District by contacting the Director of Educational Technology.

Loaned equipment remains the property of the San Marcos Unified School District. Equipment does not become the property of staff to which it is assigned.

Reporting

If an employee becomes aware of any security problem (such as any compromise of the confidentiality of any login or account information) or misuse of District technology, he/she shall immediately report such information to the Superintendent or designee.

Consequences for Violation

Violations of the law, Board policy, or this Responsible Use Agreement may result in revocation of an employee's access to District technology and/or discipline, up to and including termination. In addition, violations of the law, Board policy, or this agreement may be reported to law enforcement agencies as appropriate.

Any malicious attempts to harm or destroy District equipment or materials, data of another user of the District's system(s), or any of the agencies or other networks that are connected to the

Internet is prohibited. Deliberate attempts to compromise, degrade, or disrupt system performance may be viewed as violations of District policies and administrative regulations and, possibly, as criminal activity under applicable state and federal laws.

Unauthorized equipment as well as additions/deletions to the network, network equipment, or software are strictly prohibited. Noncompliance with applicable regulations may result in a) disciplinary action consistent with District policies and regulations; b) revocation of account; c) suspension of access to District technology. Violations of law may result in disciplinary action by the District and/or referral to law enforcement.

Employee Acknowledgment

I have received, read, understand, and agree to abide by this Responsible Use Agreement, BP 4040 - Employee Use of Technology, and other applicable laws and District policies and regulations governing the use of District technology. I understand that there is no expectation of privacy when using District technology or when my personal electronic devices use District technology. I further understand that any violation may result in revocation of user privileges, disciplinary action, and/or appropriate legal action.

I hereby release the District and its personnel from any and all claims and damages arising from my use of District technology or from the failure of any technology protection measures employed by the District.

Name: _____ Position: _____
(Please print)

School/Work Site: _____

Signature: _____ Date: _____

Adoption History:

Initial Review: 9/18/18
Approved: 10/16/18



Employment Eligibility Verification
Department of Homeland Security
 U.S. Citizenship and Immigration Services

USCIS
Form I-9
 OMB No. 1615-0047
 Expires 08/31/2019

START HERE: Read instructions carefully before completing this form. The instructions must be available, either in paper or electronically, during completion of this form. Employers are liable for errors in the completion of this form.

ANTI-DISCRIMINATION NOTICE: This form is for the purpose of verifying the employment eligibility of individuals who are authorized to work in the United States. It is not to be used for any other purpose. **CANNOT** be used to determine if an individual is a U.S. citizen or permanent resident. It is not to be used to determine if an individual is a U.S. citizen or permanent resident. It is not to be used to determine if an individual is a U.S. citizen or permanent resident.

Section 1. Employee Information and Attestation (Employees must complete and sign Section 1 of Form I-9 no later than the **first day of employment**, but not before accepting a job offer.)

Surname (Family Name)		Given Name		Title		U.S. Address (if any)	
Street Number and Name			City, State, ZIP		Country		Postal Code
Date of Birth (mm/dd/yyyy)		Manner of Acquisition of Citizenship		Date of Birth of U.S. Citizen Ancestor		U.S. Identification Number	

I am aware that federal law provides for imprisonment and/or fines for false statements or use of false documents in connection with the completion of this form.

I attest, under penalty of perjury, that I am (check one of the following boxes):

<input type="checkbox"/> I am a U.S. citizen.	U.S. Citizen (U.S. born) U.S. born in U.S. territory U.S. born abroad to U.S. citizen parents
<input type="checkbox"/> I am a U.S. permanent resident alien.	
<input type="checkbox"/> I am a U.S. temporary lawful permanent resident alien.	
<input type="checkbox"/> I am a U.S. conditional permanent resident alien.	
Aliens authorized to work must provide only one of the following document numbers to complete Form I-9: An Alien Registration Number/USCIS Number OR Form I-94 Admission Number OR Foreign Passport Number.	
1. Alien Registration Number/USCIS Number OR Form I-94 Admission Number OR Foreign Passport Number OR 2. U.S. State Department Alien Number OR U.S. State Department Alien Number OR 3. U.S. State Department Alien Number OR U.S. State Department Alien Number	

Signature	Date (mm/dd/yyyy)
-----------	-------------------

Preparer and/or Translator Certification (check one):
 I am the preparer/translator. I am not the preparer/translator.
 (Fields below must be completed and signed when preparers and/or translators assist an employee in completing Section 1.)

I attest, under penalty of perjury, that I have assisted in the completion of Section 1 of this form and that to the best of my knowledge the information is true and correct.

Signature		Date (mm/dd/yyyy)	
Surname (Family Name)		Given Name	
Street Number and Name		City, State, ZIP	
Country		Postal Code	



Employer Completes Next Page





Employment Eligibility Verification
Department of Homeland Security
 U.S. Citizenship and Immigration Services

USCIS
Form I-9
 OMB No. 1615-0047
 Expires 08/31/2019

Section 2. Employer or Authorized Representative Review and Verification

(Employers or their authorized representative must complete and sign Section 2 within 3 business days of the employee's first day of employment. You must physically examine one document from List A OR a combination of one document from List B and one document from List C as listed on the "Lists of Acceptable Documents.")

Employee Info from Section 1	Sæ ðæ æ ^ (Family Name)	Öæ ðæ æ ^ (Given Name)	T EE Öææ ^ • Öææ { ä :ææ } Åææ •
List A	OR	List B	AND
Identity and Employment Authorization		Identity	Employment Authorization
Ö [& { ^ } ÖVä^		Ö [& { ^ } ÖVä^	Ö [& { ^ } ÖVä^
Ö • ä * ÅE öQ :æ		Ö • ä * ÅE öQ :æ	Ö • ä * ÅE öQ :æ
Ö [& { ^ } Ö^ { à^!		Ö [& { ^ } Ö^ { à^!	Ö [& { ^ } Ö^ { à^!
Öc] äææ } ÅÖæ^ (if any)(mm/dd/yyyy)		Öc] äææ } ÅÖæ^ (if any)(mm/dd/yyyy)	Öc] äææ } ÅÖæ^ (if any)(mm/dd/yyyy)
Ö [& { ^ } ÖVä^		Öæäææ } æQ { : { ææ } ÖÖÖ [ä^Å^æ] • ÅÖÅÅ Ö [ä^ :æ^Å^Ö] ææ	
Ö • ä * ÅE öQ :æ			
Ö [& { ^ } Ö^ { à^!			
Öc] äææ } ÅÖæ^ (if any)(mm/dd/yyyy)			
Ö [& { ^ } ÖVä^			
Ö • ä * ÅE öQ :æ			
Ö [& { ^ } Ö^ { à^!			
Öc] äææ } ÅÖæ^ (if any)(mm/dd/yyyy)			

Certification: I attest, under penalty of perjury, that (1) I have examined the document(s) presented by the above-named employee, (2) the above-listed document(s) appear to be genuine and to relate to the employee named, and (3) to the best of my knowledge the employee is authorized to work in the United States.

The employee's first day of employment (mm/dd/yyyy): _____ (See instructions for exemptions)

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Sæ ðæ æ ^ ÅÖ [] [^ Å^ ÅE öQ : ä^ Å^ Å^] ! Å • Å } æææ^ Gagnon	Öæ ðæ æ ^ ÅÖ [] [^ Å^ ÅE öQ : ä^ Å^ Å^] ! Å • Å } æææ^ Ashley	Ö [] [^ Å^ ÅÖ • ä Å • Å^ Å^ Å^] * æ äææ } Åæ æ ^ San Marcos Unified School District
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Section 3. Reverification and Rehires *(To be completed and signed by employer or authorized representative.)*

A. P^, Åæ æ ^ (if applicable)		B. Öææ Å^ Å^ Å^ (if applicable)	
Sæ ðæ æ ^ ÅÖ [] [^ Å^ ÅE öQ : ä^ Å^ Å^] ! Å • Å } æææ^	Öæ ðæ æ ^ ÅÖ [] [^ Å^ ÅE öQ : ä^ Å^ Å^] ! Å • Å } æææ^	T ää^ ÅÖ äææ	Öææ^ (mm/dd/yyyy)
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I attest, under penalty of perjury, that to the best of my knowledge, this employee is authorized to work in the United States, and if the employee presented document(s), the document(s) I have examined appear to be genuine and to relate to the individual.

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OATH OF ALLEGIANCE AND CITIZENSHIP
FOR PERSONS EMPLOYED BY A SCHOOL DISTRICT
OF THE STATE OF CALIFORNIA

(Required by Section 3107 Title 1 Government Code)
(State of California, County of San Diego)

I, _____ do solemnly swear (or affirm) that I will support and defend the Constitution of the United States of American and the Constitution of the State of California against all enemies, foreign and domestic; that I will bear true faith and allegiance to the Constitution of the United States and the Constitution of the State of California; that I take this obligation freely, without any mental reservation or purpose of evasion and that I will well and faithfully discharge the duties upon which I am about to enter.

Signature of Employee

Taken, subscribed and sworn to before me this _____ day of _____, 20_____.

Signature of Authorized Official

San Marcos Unified School District
San Marcos, CA 92069



3 / #SM +

- ⊘ This form must be completed in order for your New Hire Packet to be complete.
- ⊘ Unfortunately, we are unable to assist you with completing this form since it is tax related.
- ⊘ If you have any questions regarding how to complete this form, please contact your tax advisor.

Before completing the 2020 Form W-4, please read the instructions that are included with the form. You must complete Steps 1 and 5. Steps 2, 3, and 4 are optional, but completing them will help ensure that your federal income tax withholding will more accurately match your tax liability.

- ⊘ Step 1 is for your personal information
- ⊘ Step 2 is for households with multiple jobs
- ⊘ Step 3 is used to claim tax credits for dependents
- ⊘ Step 4 is for other adjustments (additional income such as interest and dividends, itemized deductions that exceed the standard deduction, and extra tax you want withheld)
- ⊘ Step 5 is where you sign the form. If you are filing exempt, you must write in the word "Exempt" in the blank space below Step 4(c).

The IRS suggests that, if you are worried about reporting income from multiple jobs in Step 2 or other income in Step 4(a), you check the box in Step 2(c) or enter an additional withholding amount in Step 4(c). To determine the additional withholding amount, you can use the withholding estimator. (www.irs.gov/W4App). To effectively use the estimator, it is helpful to have a copy of your most recent pay stub and tax return.

The IRS has also published Frequently Asked Questions that you may find helpful as you complete the form (<https://www.irs.gov/newsroom/faqs-on-the-draft-2020-form-w-4>).

Employee's Withholding Certificate

Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay.

Give Form W-4 to your employer.

Your withholding is subject to review by the IRS.

Step 1: Enter Personal Information	(a) First name and middle initial	Last name	(b) Social security number
	Address		Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to www.ssa.gov .
	City or town, state, and ZIP code		
	(c) <input type="checkbox"/> Single or Married filing separately <input type="checkbox"/> Married filing jointly or Qualifying surviving spouse <input type="checkbox"/> Head of household (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.)		

Complete Steps 2-4 ONLY if they apply to you; otherwise, skip to Step 5. See page 2 for more information on each step, who can claim exemption from withholding, other details, and privacy.

Step 2: Multiple Jobs or Spouse Works

Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs.

Do **only one** of the following.

(a) Reserved for future use.

(b) Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below; **or**

(c) If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is generally more accurate than (b) if pay at the lower paying job is more than half of the pay at the higher paying job. Otherwise, (b) is more accurate

TIP: If you have self-employment income, see page 2.

Complete Steps 3-4(b) on Form W-4 for only ONE of these jobs. Leave those steps blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3-4(b) on the Form W-4 for the highest paying job.)

Step 3: Claim Dependent and Other Credits	If your total income will be \$200,000 or less (\$400,000 or less if married filing jointly):		
	Multiply the number of qualifying children under age 17 by \$2,000 \$ _____		
	Multiply the number of other dependents by \$500 \$ _____		
	Add the amounts above for qualifying children and other dependents. You may add to this the amount of any other credits. Enter the total here	3	\$ _____
Step 4 (optional): Other Adjustments	(a) Other income (not from jobs). If you want tax withheld for other income you expect this year that won't have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income	4(a)	\$ _____
	(b) Deductions. If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use the Deductions Worksheet on page 3 and enter the result here	4(b)	\$ _____
	(c) Extra withholding. Enter any additional tax you want withheld each pay period	4(c)	\$ _____

Step 5: Sign Here

Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.

Employee's signature (This form is not valid unless you sign it.)

Date

Employers Only	Employer's name and address	First date of employment	Employer identification number (EIN)

General Instructions

Section references are to the Internal Revenue Code.

Future Developments

For the latest information about developments related to Form W-4, such as legislation enacted after it was published, go to www.irs.gov/FormW4.

Purpose of Form

Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. If too little is withheld, you will generally owe tax when you file your tax return and may owe a penalty. If too much is withheld, you will generally be due a refund. Complete a new Form W-4 when changes to your personal or financial situation would change the entries on the form. For more information on withholding and when you must furnish a new Form W-4, see Pub. 505, Tax Withholding and Estimated Tax.

Exemption from withholding. You may claim exemption from withholding for 2023 if you meet both of the following conditions: you had no federal income tax liability in 2022 **and** you expect to have no federal income tax liability in 2023. You had no federal income tax liability in 2022 if (1) your total tax on line 24 on your 2022 Form 1040 or 1040-SR is zero (or less than the sum of lines 27, 28, and 29), or (2) you were not required to file a return because your income was below the filing threshold for your correct filing status. If you claim exemption, you will have no income tax withheld from your paycheck and may owe taxes and penalties when you file your 2023 tax return. To claim exemption from withholding, certify that you meet both of the conditions above by writing "Exempt" on Form W-4 in the space below Step 4(c). Then, complete Steps 1(a), 1(b), and 5. Do not complete any other steps. You will need to submit a new Form W-4 by February 15, 2024.

Your privacy. If you have concerns with Step 2(c), you may choose Step 2(b); if you have concerns with Step 4(a), you may enter an additional amount you want withheld per pay period in Step 4(c).

Self-employment. Generally, you will owe both income and self-employment taxes on any self-employment income you receive separate from the wages you receive as an employee. If you want to pay income and self-employment taxes through withholding from your wages, you should enter the self-employment income on Step 4(a). Then compute your self-employment tax, divide that tax by the number of pay periods remaining in the year, and include that resulting amount per pay period on Step 4(c). You can also add half of the annual amount of self-employment tax to Step 4(b) as a deduction. To calculate self-employment tax, you generally multiply the self-employment income by 14.13% (this rate is a quick way to figure your self-employment tax and equals the sum of the 12.4% social security tax and the 2.9% Medicare tax multiplied by 0.9235). See Pub. 505 for more information, especially if the sum of self-employment income multiplied by 0.9235 and wages exceeds \$160,200 for a given individual.

Nonresident alien. If you're a nonresident alien, see Notice 1392, Supplemental Form W-4 Instructions for Nonresident Aliens, before completing this form.

Specific Instructions

Step 1(c). Check your anticipated filing status. This will determine the standard deduction and tax rates used to compute your withholding.

Step 2. Use this step if you (1) have more than one job at the same time, or (2) are married filing jointly and you and your spouse both work.

If you (and your spouse) have a total of only two jobs, you may check the box in option (c). The box must also be checked on the Form W-4 for the other job. If the box is checked, the standard deduction and tax brackets will be cut in half for each job to calculate withholding. This option is roughly accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld, and this extra amount will be larger the greater the difference in pay is between the two jobs.



Multiple jobs. Complete Steps 3 through 4(b) on only one Form W-4. Withholding will be most accurate if you do this on the Form W-4 for the highest paying job.

Step 3. This step provides instructions for determining the amount of the child tax credit and the credit for other dependents that you may be able to claim when you file your tax return. To qualify for the child tax credit, the child must be under age 17 as of December 31, must be your dependent who generally lives with you for more than half the year, and must have the required social security number. You may be able to claim a credit for other dependents for whom a child tax credit can't be claimed, such as an older child or a qualifying relative. For additional eligibility requirements for these credits, see Pub. 501, Dependents, Standard Deduction, and Filing Information. You can also include **other tax credits** for which you are eligible in this step, such as the foreign tax credit and the education tax credits. To do so, add an estimate of the amount for the year to your credits for dependents and enter the total amount in Step 3. Including these credits will increase your paycheck and reduce the amount of any refund you may receive when you file your tax return.

Step 4 (optional).

Step 4(a). Enter in this step the total of your other estimated income for the year, if any. You shouldn't include income from any jobs or self-employment. If you complete Step 4(a), you likely won't have to make estimated tax payments for that income. If you prefer to pay estimated tax rather than having tax on other income withheld from your paycheck, see Form 1040-ES, Estimated Tax for Individuals.

Step 4(b). Enter in this step the amount from the Deductions Worksheet, line 5, if you expect to claim deductions other than the basic standard deduction on your 2023 tax return and want to reduce your withholding to account for these deductions. This includes both itemized deductions and other deductions such as for student loan interest and IRAs.

Step 4(c). Enter in this step any additional tax you want withheld from your pay **each pay period**, including any amounts from the Multiple Jobs Worksheet, line 4. Entering an amount here will reduce your paycheck and will either increase your refund or reduce any amount of tax that you owe.

Step 2(b) – Multiple Jobs Worksheet (Keep for your records.)



If you choose the option in Step 2(b) on Form W-4, complete this worksheet (which calculates the total extra tax for all jobs) on only ONE Form W-4. Withholding will be most accurate if you complete the worksheet and enter the result on the Form W-4 for the highest paying job. To be accurate, submit a new Form W-4 for all other jobs if you have not updated your withholding since 2019.

Note: If more than one job has annual wages of more than \$120,000 or there are more than three jobs, see Pub. 505 for additional tables.

- 1 Two jobs. If you have two jobs or you're married filing jointly and you and your spouse each have one job, find the amount from the appropriate table on page 4. Using the "Higher Paying Job" row and the "Lower Paying Job" column, find the value at the intersection of the two household salaries and enter that value on line 1. Then, skip to line 3
2 Three jobs. If you and/or your spouse have three jobs at the same time, complete lines 2a, 2b, and 2c below. Otherwise, skip to line 3.
a Find the amount from the appropriate table on page 4 using the annual wages from the highest paying job in the "Higher Paying Job" row and the annual wages for your next highest paying job in the "Lower Paying Job" column. Find the value at the intersection of the two household salaries and enter that value on line 2a
b Add the annual wages of the two highest paying jobs from line 2a together and use the total as the wages in the "Higher Paying Job" row and use the annual wages for your third job in the "Lower Paying Job" column to find the amount from the appropriate table on page 4 and enter this amount on line 2b
c Add the amounts from lines 2a and 2b and enter the result on line 2c
3 Enter the number of pay periods per year for the highest paying job. For example, if that job pays weekly, enter 52; if it pays every other week, enter 26; if it pays monthly, enter 12, etc.
4 Divide the annual amount on line 1 or line 2c by the number of pay periods on line 3. Enter this amount here and in Step 4(c) of Form W-4 for the highest paying job (along with any other additional amount you want withheld)

Step 4(b) – Deductions Worksheet (Keep for your records.)



- 1 Enter an estimate of your 2023 itemized deductions (from Schedule A (Form 1040)). Such deductions may include qualifying home mortgage interest, charitable contributions, state and local taxes (up to \$10,000), and medical expenses in excess of 7.5% of your income
2 Enter: { \$27,700 if you're married filing jointly or a qualifying surviving spouse; \$20,800 if you're head of household; \$13,850 if you're single or married filing separately }
3 If line 1 is greater than line 2, subtract line 2 from line 1 and enter the result here. If line 2 is greater than line 1, enter "-0-"
4 Enter an estimate of your student loan interest, deductible IRA contributions, and certain other adjustments (from Part II of Schedule 1 (Form 1040)). See Pub. 505 for more information
5 Add lines 3 and 4. Enter the result here and in Step 4(b) of Form W-4

Privacy Act and Paperwork Reduction Act Notice. We ask for the information on this form to carry out the Internal Revenue laws of the United States. Internal Revenue Code sections 3402(f)(2) and 6109 and their regulations require you to provide this information; your employer uses it to determine your federal income tax withholding. Failure to provide a properly completed form will result in your being treated as a single person with no other entries on the form; providing fraudulent information may subject you to penalties. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation; to cities, states, the District of Columbia, and U.S. commonwealths and territories for use in administering their tax laws; and to the Department of Health and Human Services for use in the National Directory of New Hires. We may also disclose this information to other countries under a tax treaty, to federal and state agencies to enforce federal nontax criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism.

You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. Generally, tax returns and return information are confidential, as required by Code section 6103.

The average time and expenses required to complete and file this form will vary depending on individual circumstances. For estimated averages, see the instructions for your income tax return.

If you have suggestions for making this form simpler, we would be happy to hear from you. See the instructions for your income tax return.

General Instructions

Section references are to the Internal Revenue Code.

Future Developments

For the latest information about developments related to Form W-4, such as legislation enacted after it was published, go to www.irs.gov/FormW4.

Purpose of Form

Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. If too little is withheld, you will generally owe tax when you file your tax return and may owe a penalty. If too much is withheld, you will generally be due a refund. Complete a new Form W-4 when changes to your personal or financial situation would change the entries on the form. For more information on withholding and when you must furnish a new Form W-4, see Pub. 505, Tax Withholding and Estimated Tax.

Exemption from withholding. You may claim exemption from withholding for 2022 if you meet both of the following conditions: you had no federal income tax liability in 2021 **and** you expect to have no federal income tax liability in 2022. You had no federal income tax liability in 2021 if (1) your total tax on line 24 on your 2021 Form 1040 or 1040-SR is zero (or less than the sum of lines 27a, 28, 29, and 30), or (2) you were not required to file a return because your income was below the filing threshold for your correct filing status. If you claim exemption, you will have no income tax withheld from your paycheck and may owe taxes and penalties when you file your 2022 tax return. To claim exemption from withholding, certify that you meet both of the conditions above by writing "Exempt" on Form W-4 in the space below Step 4(c). Then, complete Steps 1(a), 1(b), and 5. Do not complete any other steps. You will need to submit a new Form W-4 by February 15, 2023.

Your privacy. If you prefer to limit information provided in Steps 2 through 4, use the online estimator, which will also increase accuracy.

As an alternative to the estimator: if you have concerns with Step 2(c), you may choose Step 2(b); if you have concerns with Step 4(a), you may enter an additional amount you want withheld per pay period in Step 4(c). If this is the only job in your household, you may instead check the box in Step 2(c), which will increase your withholding and significantly reduce your paycheck (often by thousands of dollars over the year).

When to use the estimator. Consider using the estimator at www.irs.gov/W4App if you:

1. Expect to work only part of the year;
2. Have dividend or capital gain income, or are subject to additional taxes, such as Additional Medicare Tax;
3. Have self-employment income (see below); or
4. Prefer the most accurate withholding for multiple job situations.

Self-employment. Generally, you will owe both income and self-employment taxes on any self-employment income you receive separate from the wages you receive as an employee. If you want to pay these taxes through withholding from your wages, use the estimator at www.irs.gov/W4App to figure the amount to have withheld.

Nonresident alien. If you're a nonresident alien, see Notice 1392, Supplemental Form W-4 Instructions for Nonresident Aliens, before completing this form.

Specific Instructions

Step 1(c). Check your anticipated filing status. This will determine the standard deduction and tax rates used to compute your withholding.

Step 2. Use this step if you (1) have more than one job at the same time, or (2) are married filing jointly and you and your spouse both work.

Option (a) most accurately calculates the additional tax you need to have withheld, while option (b) does so with a little less accuracy.

If you (and your spouse) have a total of only two jobs, you may instead check the box in option (c). The box must also be checked on the Form W-4 for the other job. If the box is checked, the standard deduction and tax brackets will be cut in half for each job to calculate withholding. This option is roughly accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld, and this extra amount will be larger the greater the difference in pay is between the two jobs.



Multiple jobs. Complete Steps 3 through 4(b) on only one Form W-4. Withholding will be most accurate if you do this on the Form W-4 for the highest paying job.

Step 3. This step provides instructions for determining the amount of the child tax credit and the credit for other dependents that you may be able to claim when you file your tax return. To qualify for the child tax credit, the child must be under age 17 as of December 31, must be your dependent who generally lives with you for more than half the year, and must have the required social security number. You may be able to claim a credit for other dependents for whom a child tax credit can't be claimed, such as an older child or a qualifying relative. For additional eligibility requirements for these credits, see Pub. 501, Dependents, Standard Deduction, and Filing Information. You can also include **other tax credits** for which you are eligible in this step, such as the foreign tax credit and the education tax credits. To do so, add an estimate of the amount for the year to your credits for dependents and enter the total amount in Step 3. Including these credits will increase your paycheck and reduce the amount of any refund you may receive when you file your tax return.

Step 4 (optional).

Step 4(a). Enter in this step the total of your other estimated income for the year, if any. You shouldn't include income from any jobs or self-employment. If you complete Step 4(a), you likely won't have to make estimated tax payments for that income. If you prefer to pay estimated tax rather than having tax on other income withheld from your paycheck, see Form 1040-ES, Estimated Tax for Individuals.

Step 4(b). Enter in this step the amount from the Deductions Worksheet, line 5, if you expect to claim deductions other than the basic standard deduction on your 2022 tax return and want to reduce your withholding to account for these deductions. This includes both itemized deductions and other deductions such as for student loan interest and IRAs.

Step 4(c). Enter in this step any additional tax you want withheld from your pay **each pay period**, including any amounts from the Multiple Jobs Worksheet, line 4. Entering an amount here will reduce your paycheck and will either increase your refund or reduce any amount of tax that you owe.

Employees' Withholding Allowance Certificate

Complete this form so that your employer can withhold the correct California state income tax from your paycheck.

Enter Personal Information	
First, Middle, Last Name	Social Security Number
Address City, State, and ZIP Code	Filing Status Single or Married (with two or more incomes) Married (one income) Head of Household

1. Use Worksheet A for Regular Withholding allowances. Use other worksheets on the following pages as applicable.
 - 1a. Number of Regular Withholding Allowances (Worksheet A) _____
 - 1b. Number of allowances from the Estimated Deductions (Worksheet B, if applicable.) _____
 - 1c. Total Number of Allowances you are claiming _____
2. Additional amount, if any, you want withheld each pay period (if employer agrees), (**Worksheet C**) _____
OR

Exemption from Withholding

3. I claim exemption from withholding for 2022, and I certify I meet both of the conditions for exemption. (Check box here)
OR
4. I certify under penalty of perjury that I am **not subject** to California withholding. I meet the conditions set forth under the Service Member Civil Relief Act, as amended by the Military Spouses Residency Relief Act and the Veterans Benefits and Transition Act of 2018. (Check box here)

Under the penalties of perjury, I certify that the number of withholding allowances claimed on this certificate does not exceed the number to which I am entitled or, if claiming exemption from withholding, that I am entitled to claim the exempt status.

Employee's Signature _____ Date _____

Employer's Section: Employer's Name and Address	California Employer Payroll Tax Account Number
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Purpose: This certificate, DE 4, is for **California Personal Income Tax (PIT)** withholding purposes only. The DE 4 is used to compute the amount of taxes to be withheld from your wages, by your employer, to accurately reflect your state tax withholding obligation.

Beginning January 1, 2020, *Employee's Withholding Allowance Certificate* (Form W-4) from the Internal Revenue Service (IRS) will be used for federal income tax withholding **only**. You must file the state form *Employee's Withholding Allowance Certificate* (DE 4) to determine the appropriate California PIT withholding.

If you do not provide your employer with a withholding certificate, the employer must use Single with Zero withholding allowance.

Check Your Withholding: After your DE 4 takes effect, compare the state income tax withheld with your estimated total annual tax. For state withholding, use the worksheets on this form.

Exemption From Withholding: If you wish to claim exempt, complete the federal Form W-4 and the state DE 4. You may claim exempt from withholding California income tax if you meet both of the following conditions for exemption:

1. You did not owe any federal/state income tax last year, and
2. You do not expect to owe any federal/state income tax this year. The exemption is good for one year.

If you continue to qualify for the exempt filing status, a new DE 4 designating **exempt** must be submitted by February 15 each year to continue your exemption. If you are not having federal/state income tax withheld this year but expect to have a tax liability next year, you are required to give your employer a new DE 4 by December 1.

Member Service Civil Relief Act: Under this act, as provided by the Military Spouses Residency Relief Act and the Veterans Benefits and Transition Act of 2018, you may be exempt from California income tax withholding on your wages if

- (i) Your spouse is a member of the armed forces present in California in compliance with military orders;
- (ii) You are present in California solely to be with your spouse; and
- (iii) You maintain your domicile in another state.

If you claim exemption under **this** act, **check the box on Line 4**. You may be required to provide proof of exemption upon request.

The *California Employer's Guide (DE 44)* (edd.ca.gov/pdf_pub_ctr/de44.pdf) provides the income tax withholding tables. This publication may be found by visiting Payroll Taxes - Forms and Publications (edd.ca.gov/Payroll_Taxes/Forms_and_Publications.htm). To assist you in calculating your tax liability, please visit the Franchise Tax Board (FTB) (ftb.ca.gov).

If you need information on your last *California Resident Income Tax Return (FTB Form 540)*, visit the FTB (ftb.ca.gov).

Notification: The burden of proof rests with the employee to show the correct California income tax withholding. Pursuant to section 4340-1(e) of Title 22, California Code of Regulations (CCR) (govt.westlaw.com/calregs/Search/Index), the FTB or the EDD may, by special direction in writing, require an employer to submit a Form W-4 or DE 4 when such forms are necessary for the administration of the withholding tax programs.

Penalty: You may be fined \$500 if you file, with no reasonable basis, a DE 4 that results in less tax being withheld than is properly allowable. In addition, criminal penalties apply for willfully supplying false or fraudulent information or failing to supply information requiring an increase in withholding. This is provided by section 13101 of the California Unemployment Insurance Code (leginfo.legislature.ca.gov/faces/codes.xhtml) and section 19176 of the Revenue and Taxation Code (leginfo.legislature.ca.gov/faces/codes.xhtml).

Worksheets

Instructions — 1 — Allowances*

When determining your withholding allowances, you must consider your personal situation:

- Do you claim allowances for dependents or blindness?
- Will you itemize your deductions?
- Do you have more than one income coming into the household?

Two-Earners/Multiple Incomes: When earnings are derived from more than one source, under-withholding may occur. If you have a working spouse or more than one job, it is best to check the box "SINGLE or MARRIED (with two or more incomes)." Figure the total number of allowances you are entitled to claim on all jobs using only one DE 4 form. Claim allowances with **one** employer.

Do **not** claim the same allowances with more than one employer. Your withholding will usually be most accurate when all allowances are claimed on the DE 4 filed for the highest paying job and zero allowances are claimed for the others.

Married But Not Living With Your Spouse: You may check the "Head of Household" marital status box if you meet all of the following tests:

- (1) Your spouse will not live with you **at any time** during the year;
- (2) You will furnish over half of the cost of maintaining a home for the entire year for yourself and your child or stepchild who qualifies as your dependent; **and**
- (3) You will file a separate return for the year.

Head of Household: To qualify, you must be unmarried or legally separated from your spouse and pay more than 50% of the costs of maintaining a home for the **entire** year for yourself and your dependent(s) or other qualifying individuals. Cost of maintaining the home includes such items as rent, property insurance, property taxes, mortgage interest, repairs, utilities, and cost of food. It does not include the individual's personal expenses or any amount which represents value of services performed by a member of the household of the taxpayer.

Worksheet A

Regular Withholding Allowances

- | | |
|--|-----|
| (A) Allowance for yourself — enter 1 | (A) |
| (B) Allowance for your spouse (if not separately claimed by your spouse) — enter 1 | (B) |
| (C) Allowance for blindness — yourself — enter 1 | (C) |
| (D) Allowance for blindness — your spouse (if not separately claimed by your spouse) — enter 1 | (D) |
| (E) Allowance(s) for dependent(s) — do not include yourself or your spouse | (E) |
| (F) Total — add lines (A) through (E) above and enter on line 1a of the DE 4 | (F) |

Instructions — 2 — (Optional) Additional Withholding Allowances

If you expect to itemize deductions on your California income tax return, you can claim additional withholding allowances. Use Worksheet B to determine whether your expected estimated deductions may entitle you to claim **one or more additional** withholding allowances. Use last year's FTB Form 540 as a model to calculate this year's withholding amounts.

Do not include deferred compensation, qualified pension payments, or flexible benefits, etc., that are deducted from your gross pay but are not taxed on this worksheet.

You may reduce the amount of tax withheld from your wages by claiming one additional withholding allowance for each \$1,000, or fraction of \$1,000, by which you expect your estimated deductions for the year to exceed your allowable standard deduction.

Worksheet B

Estimated Deductions

Use this worksheet **only** if you plan to itemize deductions, claim certain adjustments to income, or have a large amount of nonwage income not subject to withholding.

1. Enter an estimate of your itemized deductions for California taxes for this tax year as listed in the schedules in the FTB Form 540 1.
2. Enter \$9,606 if married filing joint with two or more allowances, unmarried head of household, or qualifying widow(er) with dependent(s) or \$4,803 if single or married filing separately, dual income married, or married with multiple employers – 2.
3. Subtract line 2 from line 1, enter difference = 3.
4. Enter an estimate of your adjustments to income (alimony payments, IRA deposits) + 4.
5. Add line 4 to line 3, enter sum = 5.
6. Enter an estimate of your nonwage income (dividends, interest income, alimony receipts) – 6.
7. If line 5 is greater than line 6 (if less, see below [go to line 9]); Subtract line 6 from line 5, enter difference = 7.
8. Divide the amount on line 7 by \$1,000, round any fraction to the nearest whole number enter this number on line 1b of the DE 4. Complete Worksheet C, if needed, otherwise **stop here.** 8.
9. If line 6 is greater than line 5; Enter amount from line 6 (nonwage income) 9.
10. Enter amount from line 5 (deductions) 10.
11. Subtract line 10 from line 9, enter difference. Then, complete Worksheet C. 11.

*Wages paid to registered domestic partners will be treated the same for state income tax purposes as wages paid to spouses for California PIT withholding and PIT wages. This law does not impact federal income tax law. A registered domestic partner means an individual partner in a domestic partner relationship within the meaning of section 297 of the Family Code. For more information, please call our Taxpayer Assistance Center at 1-888-745-3886.

1. Enter estimate of total wages for tax year 2022. 1.
2. Enter estimate of nonwage income (line 6 of Worksheet B). 2.
3. Add line 1 and line 2. Enter sum. 3.
4. Enter itemized deductions or standard deduction (line 1 or 2 of Worksheet B, whichever is largest). 4.
5. Enter adjustments to income (line 4 of Worksheet B). 5.
6. Add line 4 and line 5. Enter sum. 6.
7. Subtract line 6 from line 3. Enter difference. 7.
8. Figure your tax liability for the amount on line 7 by using the 2022 tax rate schedules below. 8.
9. Enter personal exemptions (line F of Worksheet A x \$141.90). 9.
10. Subtract line 9 from line 8. Enter difference. 10.
11. Enter any tax credits. (See FTB Form 540). 11.
12. Subtract line 11 from line 10. Enter difference. This is your total tax liability. 12.
13. Calculate the tax withheld and estimated to be withheld during 2022. Contact your employer to request the amount that will be withheld on your wages based on the marital status and number of withholding allowances you will claim for 2022. Multiply the estimated amount to be withheld by the number of pay periods left in the year. Add the total to the amount already withheld for 2022. 13.
14. Subtract line 13 from line 12. Enter difference. If this is less than zero, you do not need to have additional taxes withheld. 14.
15. Divide line 14 by the number of pay periods remaining in the year. Enter this figure on line 2 of the DE 4. 15.

Note: Your employer is not required to withhold the additional amount requested on line 2 of your DE 4. If your employer does not agree to withhold the additional amount, you may increase your withholdings as much as possible by using the "single" status with "zero" allowances. If the amount withheld still results in an underpayment of state income taxes, you may need to file quarterly estimates on Form 540-ES with the FTB to avoid a penalty.

These Tables Are for Calculating Worksheet C and for 2022 Only

**Single Persons, Dual Income
Married With Multiple Employers**

IF THE TAXABLE INCOME IS		COMPUTED TAX IS		
OVER	BUT NOT OVER	OF AMOUNT OVER...		PLUS
\$0	\$9,325	1.100%	\$0	\$0.00
\$9,325	\$22,107	2.200%	\$9,325	\$102.58
\$22,107	\$34,892	4.400%	\$22,107	\$383.78
\$34,892	\$48,435	6.600%	\$34,892	\$946.32
\$48,435	\$61,214	8.800%	\$48,435	\$1,840.16
\$61,214	\$312,686	10.230%	\$61,214	\$2,964.71
\$312,686	\$375,221	11.330%	\$312,686	\$28,690.30
\$375,221	\$625,369	12.430%	\$375,221	\$35,775.52
\$625,369	\$1,000,000	13.530%	\$625,369	\$66,868.92
\$1,000,000	and over	14.630%	\$1,000,000	\$117,556.49

Married Persons

IF THE TAXABLE INCOME IS		COMPUTED TAX IS		
OVER	BUT NOT OVER	OF AMOUNT OVER...		PLUS
\$0	\$18,650	1.100%	\$0	\$0.00
\$18,650	\$44,214	2.200%	\$18,650	\$205.15
\$44,214	\$69,784	4.400%	\$44,214	\$767.56
\$69,784	\$96,870	6.600%	\$69,784	\$1,892.64
\$96,870	\$122,428	8.800%	\$96,870	\$3,680.32
\$122,428	\$625,372	10.230%	\$122,428	\$5,929.42
\$625,372	\$750,442	11.330%	\$625,372	\$57,380.59
\$750,442	\$1,000,000	12.430%	\$750,442	\$71,551.02
\$1,000,000	\$1,250,738	13.530%	\$1,000,000	\$102,571.08
\$1,250,738	and over	14.630%	\$1,250,738	\$136,495.93

Unmarried Head of Household

IF THE TAXABLE INCOME IS		COMPUTED TAX IS		
OVER	BUT NOT OVER	OF AMOUNT OVER...		PLUS
\$0	\$18,663	1.100%	\$0	\$0.00
\$18,663	\$44,217	2.200%	\$18,663	\$205.29
\$44,217	\$56,999	4.400%	\$44,217	\$767.48
\$56,999	\$70,542	6.600%	\$56,999	\$1,329.89
\$70,542	\$83,324	8.800%	\$70,542	\$2,223.73
\$83,324	\$425,251	10.230%	\$83,324	\$3,348.55
\$425,251	\$510,303	11.330%	\$425,251	\$38,327.68
\$510,303	\$850,503	12.430%	\$510,303	\$47,964.07
\$850,503	\$1,000,000	13.530%	\$850,503	\$90,250.93
\$1,000,000	and over	14.630%	\$1,000,000	\$110,477.87

If you need information on your last California Resident Income Tax Return, FTB Form 540, visit [FTB](http://ftb.ca.gov) (ftb.ca.gov).

The DE 4 information is collected for purposes of administering the PIT law and under the authority of Title 22, CCR, section 4340-1, and the California Revenue and Taxation Code, including section 18624. The Information Practices Act of 1977 requires that individuals be notified of how information they provide may be used. Further information is contained in the instructions that came with your last California resident income tax return.

DIRECT DEPOSIT AUTHORIZATION

PRINT or TYPE

NAME _____

EMPLOYEE ID NO. _____

DISTRICT _____ WORK SITE _____

Do you currently have an active Direct Deposit on file with another District or Charter School within San Diego County? Yes No
 If yes, what District(s) and/or Charter School(s)? _____

I hereby authorize the above named School District(s), Charter School(s), and the San Diego County Office of Education (SDCOE) and/or their agents to initiate electronic deposits via the Automated Clearing House (ACH) and, as necessary, to debit corrections to previous deposits, to the account(s) specified below.

- Direct deposit status is not activated until my regular payroll cycle following a \$0 test transaction (approx. 30 days).
- I must submit a new authorization form if I close/change my account (name, branch, etc.). Failure to do so may result in a deposit delay.
- All new accounts must go through a Prenote verification (approx. 30 days), during which time a live warrant will be issued.
- Direct deposit status will be temporarily suspended if wages are garnished and/or the Credentials Unit at SDCOE places a hold on the warrant.
- It is my responsibility to keep apprised of any deposit(s) made to my account(s), including the date(s) and amount(s) of any such deposit(s).

I agree to hold harmless and indemnify the School District(s), Charter School(s), and SDCOE and their officers, employees, and agents from any claim or demand of whatever nature, including those based upon negligence of the District, School, or SDCOE and their officers, employees, and agents for failure or delay in making deposits and/or corrections to deposits as herein authorized.

This authorization replaces any previous agreements made by me and will remain in effect until changed or canceled by submission of a new Direct Deposit Authorization to the District, School, or SDCOE office in which I am currently employed. **All District, School, and SDCOE assignments, both current and future, will automatically be linked to the most recent Direct Deposit Authorization received by my current employer(s).**

Signature: _____ Date: _____

DEPOSIT INSTRUCTIONS:

**New ACH Set Up
(Prenote Needed)**

**ACH Amount Change
(No Prenote needed)**

ACH Cancellation

Name of Financial institution _____

address of Financial institution _____

Financial institution transit routing No.

Checking

Savings

Net Check, or

\$ _____

Checking Account Number

Net Check, or

\$ _____

Savings account Number

**ATTACH VOIDED, BLANK
CHECK HERE, IF
DEPOSITING TO A
CHECKING OR SHARE
DRAFT ACCOUNT**

Jane A. Doe
1000 Main St.
Anywhere, U.S.A. 10001

PAy to the _____ 20____
or Der of _____ \$ _____
_____ Doll Ar S

Me Mo _____

⑆ 1222333441⑆ 999111222⑆ 1234

transit routing No.
Account No.
Check No.

SAN MARCOS UNIFIED SCHOOL DISTRICT

EMPLOYEE'S DESIGNATION OF BENEFICIARY UNDER GOVERNMENT CODE SECTION 53245*

INSTRUCTIONS: Please complete this form and return it to the Human Resources Department.

From: _____ Employee Name _____ XXX-XX-_____ Social Security Number (Last 4 numbers only)

To: SMUSD Human Resources & Development Department

Re: Designation of Person to Receive and Negotiate Warrants After Death Under Government Code Section 53245

This is to inform you that in the event of my death, I hereby designate:

_____ Name of Designee

as the person entitled to receive and negotiate all warrants or checks that will be payable to me from the Superintendent of Schools, San Diego County Office of Education.

This designee is: Husband Wife Parent Child Other _____

He/she may be identified as follows:

_____ Date of Birth _____ Place of Birth _____ XXX - XX - _____ Social Security Number (Last 4 numbers only)

Beneficiary

Address, this date:

I understand that it is my responsibility to keep this designation current, and further, I understand that the designation is in addition to, and separate from, the beneficiary designation filed with the State Teachers' Retirement System, the Public Employees' Retirement System, the County Employees' Retirement System, or in any other will, codicils or like documents.

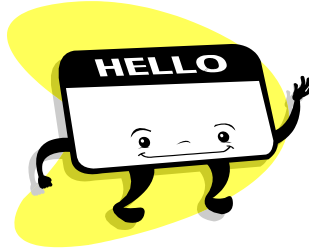
_____ Date Filed _____ Signature

*Government Code, Section 53245

"Any person now or hereafter employed by a county, city, municipal corporation, district or other public agency may file with his appointing power a designation of a person who, notwithstanding any other provision of law, shall, on the death of the employee, be entitled to receive all warrants or checks that would have been payable to the decedent had he survived. The employee may change the designation from time to time. A person so designated shall claim such warrants or checks from the appointing power. On sufficient proof of identity, the appointing power shall deliver the warrants or checks to the claimant. A person who received a warrant or check pursuant to this section is entitled to negotiate it as if he were the payee."

HUMAN RESOURCES AND DEVELOPMENT

VOLUNTARY INFORMATION FORM



Section 1233 of the California Government Code permits public employers to solicit from employees and applicants a voluntary declaration of sex and racial/ethnic group membership. Information provided will assist the San Marcos Unified School District (SMUSD) in accurately compiling required statistical reports for federal and state agencies. None of the information will be used to discriminate against or give preference to any individual in any personnel transaction. Other information requested is for the SMUSD use only and is also voluntary.

PLEASE PRINT

Full legal name: _____

Position: Substitute Teacher

Birthdate: _____ Gender: _____

School site/Work location: San Marcos Unified School District

The following questions are required to be in compliance with new Federal/State laws. Please mark the appropriate area:

Ethnic Background: Are you Hispanic or Latino? NO YES

Please continue to answer the following by marking one or more to indicate your race:

<input type="checkbox"/> Alaskan Native	<input type="checkbox"/> Chinese	<input type="checkbox"/> Hmong	<input type="checkbox"/> Other Asian	<input type="checkbox"/> Vietnamese
<input type="checkbox"/> American Indian	<input type="checkbox"/> Filipino	<input type="checkbox"/> Japanese	<input type="checkbox"/> Other Pacific Islander	<input type="checkbox"/> White
<input type="checkbox"/> Black/African American	<input type="checkbox"/> Guamanian	<input type="checkbox"/> Korean	<input type="checkbox"/> Samoan	
<input type="checkbox"/> Cambodian	<input type="checkbox"/> Hawaiian	<input type="checkbox"/> Laotian	<input type="checkbox"/> Tahitian	



Retirement System and Social Security System Disclosures

Please complete, sign and date

YES **NO**

Are you currently, or have you been, a member of CALPERS
(California Public Employee Retirement System)?

Are you receiving a CALPERS pension payment?

Are you currently, or have you been, a member of CALSTRS
(California State Teachers Retirement System)?

Are you receiving a CALSTRS pension payment?

Are you receiving Social Security Retirement benefits?

Print Employee Name

Employee Signature

Date

If you are employed to perform creditable service in a position that is excluded from mandatory membership in the CalSTRS' Defined Benefit (DB) Program, you may use this form to elect DB Program membership at any time while employed to perform creditable service.

A permissive election of membership in the DB Program applies to all future creditable service performed for the same or another employer, including any non-member or CalSTRS Cash Balance Benefit (CB) Program service you are currently performing. You may be entitled to elect coverage by the CB Program or California Public Employees' Retirement System (CalPERS) for future eligible service as allowed by law. Please work with your employer if you believe you are entitled to make one of these elections.

A permissive election of membership in the DB Program is irrevocable. Membership may only be cancelled if you terminate all employment to perform creditable service and refund your accumulated retirement contributions from the CalSTRS DB Program.

SECTION 1: EMPLOYEE INFORMATION (TO BE COMPLETED BY EMPLOYEE)

Provide the following information:

- CalSTRS Client ID* or Social Security Number
- Last Name, First Name and Middle Initial
- Mailing Address**, City, State and Zip Code
- Date of Birth
- Email Address
- Telephone Number

*If you have already been employed to perform creditable service you will have a CalSTRS Client ID, even if you were not formerly a member. Please provide your CalSTRS Client ID, if you have one, in lieu of your Social Security Number.

**To establish residency for tax purposes, we ask that you provide a street address. Be sure to include any street, apartment or suite number. If your post office does not deliver mail to your street address, you may enter your box number instead. If you reside outside the United States, use the CITY – STATE – ZIP field to provide your foreign address. If you receive your mail in care of a third party, enter "c/o" followed by the third party's name and address.

SECTION 2: EMPLOYEE ELECTION (TO BE COMPLETED BY EMPLOYEE)

If you want to elect membership in the CalSTRS DB Program:

- Check the appropriate box
- Provide your requested membership date***

***You will begin contributing to the DB Program as of your membership date. Your membership date can be no earlier than the first day of the pay period in which your election is made, or your first day of employment, whichever is later. Work with your employer to select the most beneficial, valid membership date you are eligible for. Electing an invalid membership date will require a revision to your election form and may result in delayed contributions to CalSTRS.

If you do not want to elect membership in the CalSTRS DB Program at this time, check the appropriate box.

SECTION 3: REQUIRED SIGNATURE (TO BE COMPLETED BY EMPLOYEE)

Sign the form and date your signature.
Return the form to your employer.

SECTION 4: EMPLOYEE POSITION INFORMATION (TO BE COMPLETED BY EMPLOYER)

Provide the position hire date – the date in which the employee was hired to perform creditable service in the position they are making this election for. CalSTRS defers to the employer as to the date in which you consider an employee to be hired. Provide the position title – the title of the position the employee is performing creditable service in.

SECTION 5: EMPLOYER INFORMATION AND CERTIFICATION (TO BE COMPLETED BY EMPLOYER)

Verify the employee is eligible for the requested membership date.

Provide the following information:

- The employer (county or district) name
- County and district code
- Name and title of employer official completing the form

Sign the form and date your signature.
Submit the form to CalSTRS and retain a copy.

Permissive Membership
ES 0350 REV 03/20

[For CalSTRS' Official Use Only]



California State Teachers' Retirement System
P.O. Box 15275, MS 17
Sacramento, CA 95851-0275
800-228-5453
CalSTRS.com

**PERMISSIVE MEMBERSHIP ELECTION AND/OR ACKNOWLEDGEMENT OF RECEIPT
OF CALSTRS DEFINED BENEFIT PROGRAM MEMBERSHIP INFORMATION**

This form is used to permissively elect membership in the CalSTRS Defined Benefit Program and/or to acknowledge receipt of information provided by an employer about the right to elect membership in the CalSTRS Defined Benefit Program. Please read all instructions before completing the form.

Section 1: Employee Information (to be completed by employee)

Provide either your CalSTRS Client ID or Social Security number.

CLIENT ID

SOCIAL SECURITY NUMBER

LAST NAME

FIRST NAME

MI

ADDRESS (number, street, apt or suite no.)

CITY

STATE

ZIP CODE

DATE OF BIRTH (MM/DD/YYYY)

EMAIL ADDRESS

TELEPHONE

Section 2: Employee Election (to be completed by employee)

Check One:

- I elect membership in the CalSTRS Defined Benefit Program as of: _____

MEMBERSHIP DATE (MM/DD/YYYY)**

I understand this election applies to all future creditable service performed for any current or future employer unless another election is made as allowed by law. I understand my membership is irrevocable and may only be cancelled by terminating all employment to perform creditable service and receiving a refund of my accumulated retirement contributions from the CalSTRS Defined Benefit Program.

**Membership Date may be no earlier than the first day of the pay period in which the election is made, or the first day of employment, whichever is later. Please work with your employer to select the most beneficial, valid membership date.

- I decline membership in the CalSTRS Defined Benefit Program at this time

I understand that I can elect membership in the CalSTRS Defined Benefit Program at any time while I am employed to perform creditable service.



Section 3: Required Signature (to be completed by employee)

I certify that I have received information from my employer concerning the CalSTRS Defined Benefit Program and understand the criteria for membership in the program.

I understand it is a crime to fail to disclose a material fact or to make any knowingly false material statement, including a false statement regarding my marital status, for the purpose of using it, or allowing it to be used, to obtain, receive, continue, increase, deny or reduce any benefit administered by CalSTRS and it may result in penalties, including restitution, of up to one year in jail and/or a fine of up to \$5,000 (Education Code section 22010). It may also result in any document containing such false representation being voided. I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct. I understand that perjury is punishable by imprisonment for up to four years (Penal Code section 126).

EMPLOYEE SIGNATURE	DATE (MM/DD/YYYY)
--------------------	-------------------


Section 4: Employee Position Information (to be completed by employer)

POSITION TITLE	POSITION HIRE DATE
----------------	--------------------

Section 5: Employer Information and Certification (to be completed by employer) Required Signature

I certify that the above-named employee was provided information about their right to elect membership in the CalSTRS Defined Benefit Program and, if electing membership, is eligible to elect membership in the CalSTRS Defined Benefit Program as of the membership date provided.

I understand it is a crime to fail to disclose a material fact or to make any knowingly false material statement for the purpose of using it, or allowing it to be used, to obtain, receive, continue, increase, deny or reduce any benefit administered by CalSTRS and it may result in penalties, including restitution, of up to one year in jail and/or a fine of up to \$5,000 (Education Code section 22010). It may also result in any document containing such false representation being voided. I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct. I understand that perjury is punishable by imprisonment for up to four years (Penal Code section 126).

EMPLOYER OFFICIAL'S SIGNATURE 	DATE (MM/DD/YYYY)
EMPLOYER NAME San Marcos Unified School District	COUNTY AND DISTRICT CODE 37-065
EMPLOYER OFFICIAL'S NAME AND TITLE Gary DeBora, Human Resources Director	

The following instructions are to assist you and your employer in completing the *Retirement System Election form* (ES 0372). Please read the instructions and information for retirement system coverage before completing the form. Please type or print legibly in dark ink.

INFORMATION

A member of the CalSTRS Defined Benefit Program who becomes employed by a school district, a community college district, a county superintendent of schools, limited state departments, or the California Community Colleges Board of Governors to perform service that requires membership in a different public retirement system, may elect to receive credit under the CalSTRS Defined Benefit Program for such service by completing a *Retirement System Election form* (ES 0372) within 60 days after the hire date requiring membership in the other system, and CalSTRS must receive the completed form within 60 days of the signature date. If the CalSTRS member does not elect to continue as a member of CalSTRS, all service subject to coverage by the other public retirement system will be reported to that retirement system. (Education Code sections 22508, 22508.5 and 22509)

A member of CalPERS who was employed by a school employer, Board of Governors of the California Community Colleges, or State Department of Education within 120 days before the member's date of hire, or who has at least five years of CalPERS credited service, and who accepts employment to perform creditable service that requires membership by the CalSTRS Defined Benefit Program, may elect to receive credit under CalPERS for such service by submitting a *Retirement System Election form* (ES 0372) to CalPERS, within 60 days after the hire date of employment requiring membership in CalSTRS. If the CalPERS member does not elect to continue as a member of CalPERS, all CalSTRS creditable service will be reported to CalSTRS. (Government Code section 20309).

Education Code section 22509 requires that within 10 working days of hire, an employer must provide all employees who have the right to make this election with the information regarding their election rights and must make available written information about the retirement systems to assist the employee in making an election.

SECTION 1: MEMBER INFORMATION AND ELECTION

Section 1 must be completed by the employee with assistance from the employer. Please complete all entries in Section 1.

EMPLOYEE NAME and SOCIAL SECURITY NUMBER – Enter employee's full name, and full Social Security Number.

RETIREMENT SYSTEM COVERAGE:

If you are a member of CalSTRS and have accepted employment to perform service that requires membership in a different public retirement system, mark the box next to the coverage you elect.

If you are a member of CalPERS and have accepted employment to perform service that requires membership in CalSTRS, mark the box next to the coverage you elect.

EMPLOYEE SIGNATURE – Sign and date the form. By signing this document, you certify that you have received information from your employer regarding your right to the Retirement System Election. You also certify that you understand this election is irrevocable, and that it is a crime to fail to disclose a material fact or to make any knowingly false material statements for the purpose of altering a benefit administered by CalSTRS which may result in up to one year in jail and a fine of up to \$5,000. (Education Code section 22010)

Submit the signed and dated *Retirement System Election form* (ES 0372) to your employer. Retain a copy for your records.

For general membership information, contact CalSTRS by calling 800-228-5453, or write to CalSTRS at P.O. Box 15275, MS 17, Sacramento, CA 95851-0275.

SECTION 2: EMPLOYER CERTIFICATION

Section 2 must be completed by the employer and the County Office of Education. Please complete the employer certification only after the employee has completed Section 1. Employees must qualify for membership before they can retirement system elect.

EMPLOYER:

POSITION HIRE DATE – Enter the date the employee was hired in the position.

POSITION EFFECTIVE DATE – Enter the first date that service was/will be performed by the employee in the new position.

POSITION TITLE – Enter employee's new position title and check the box next to the applicable position type.

CO/DIST CODE/STATE DEPARTMENT – Enter the appropriate county and district codes. Example: Kern

County, Edison Elementary would be 15-012, and CA Department of Education would be 59-174.

EMPLOYER CERTIFICATION – Print school or state official's name, title and phone number, and sign and date the form.

Submit the completed form to the County Office of Education.

If you represent a state department, submit the form directly to CalSTRS and retain a copy of the employee's signed election form.

COUNTY OFFICE OF EDUCATION:

Print the County official's name, title and phone number, and sign and date the form.

Retain a copy for your and the employee's files.

SUBMIT THE FORM:

The *Retirement System Election* form (ES 0372) must be submitted to the retirement system elected by the employee. For additional requirements, please see the Information section.

Mail completed forms to:

CalSTRS
P.O. Box 15275, MS 17
Sacramento, CA 95851-0275

CalPERS
P.O. Box 942709 Sacramento, CA 94229-2709

CalSTRS also accepts the form by secure messaging via the Secure Employer Website.

Retirement System Election

ES 0372 REV 06/21

[For CalSTRS' Official Use Only]

CALSTRS®

California State Teachers' Retirement System

P.O. Box 15275, MS 17

Sacramento, CA 95851-0275

800-228-5453

CalSTRS.com

RETIREMENT SYSTEM ELECTION AND ACKNOWLEDGEMENT OF RECEIPT OF RETIREMENT SYSTEM INFORMATION

Please read the attached information and instructions before completing this form. Please type or print legibly in dark ink.

SECTION 1: Member Information and Election (to be completed by employee)

NAME (LAST, FIRST, MIDDLE INITIAL)

SOCIAL SECURITY NUMBER

A member of **CalSTRS** who becomes employed in a new position by the same or a different school district, a community college district, a county superintendent of schools, limited state employment or the Board of Governors of the California Community Colleges, as defined in Education Code sections 22508 and 22508.5, to perform service that *requires* membership in a different public retirement system will have that service credited with that other public retirement system unless the member files a written election (within 60 days after the date of hire) to have that service covered by CalSTRS, pursuant to Education Code section 22508(a) or 22508.5(a).

I am a member of CalSTRS who has accepted employment to perform service that *requires* membership in a different public retirement system and am eligible to elect to continue retirement system coverage under CalSTRS.

I elect coverage in: (please choose one)

- CA State Teachers' Retirement System (CalSTRS)
- CA Public Employee's Retirement System (CalPERS) *
- A Different Public Retirement System identified here:

OR

A member of **CalPERS** who was employed by a school employer, Board of Governors of the California Community Colleges or State Department of Education within 120 days before the member's date of hire, or who has at least five years of CalPERS credited service, as defined in Government Code section 20309, and who is subsequently employed to perform creditable service that requires membership in the Defined Benefit Program of CalSTRS, will have that service credited with CalSTRS unless the member files a written election (within 60 days after the date of hire) to have the service credited with CalPERS, pursuant to Government Code section 20309.

I am a member of CalPERS who has accepted employment to perform service that requires membership in the CalSTRS Defined Benefit Program and am eligible to elect to continue coverage under CalPERS.

I elect coverage in: (please choose one)

- CA State Teachers' Retirement System (CalSTRS)
- CA Public Employee's Retirement System (CalPERS) *



ES0372

With my signature below, I certify that I have received information from my employer regarding my eligibility to elect membership for this position as described on this form. I fully understand that this election is irrevocable. I understand it is a crime to fail to disclose a material fact or to make any knowingly false material statements for the purpose of altering or receiving a benefit administered by CalSTRS and it may result in up to one year in jail and/or a fine of up to \$5,000 pursuant to Education Code section 22010.

EMPLOYEE SIGNATURE

DATE

SECTION 2: Employer Certification (to be completed by employer and County Office of Education)

With my signature below, I certify that I have provided information to the above employee regarding his/her eligibility to elect membership for this position, pursuant to Education Code section 22509. I certify the employee meets the qualifications to make a retirement system election, pursuant to Education Code sections 22508 or 22508.5, or Government Code section 20309.

EMPLOYEE POSITION INFORMATION:

POSITION HIRE DATE

POSITION EFFECTIVE DATE

POSITION TITLE

SELECT ONE:

CREDENTIALLED

CLASSIFIED

STATE SERVICE

EMPLOYER INFORMATION:

CO/DIST/STATE DEPT NAME

San Marcos Unified School District

CALSTRS REPORT UNIT CODE

37-065

SCHOOL/STATE OFFICIAL'S NAME

Gary DeBora

TITLE

Director, HR

PHONE NUMBER

760-752-1242

SIGNATURE OF SCHOOL/STATE OFFICIAL



DATE

COUNTY OFFICIAL'S NAME

TITLE

PHONE NUMBER

SIGNATURE OF COUNTY OFFICIAL

*CALPERS EMPLOYER CODE

To: San Marcos Unified School District Substitute Employee
From: Joel Garcia, Assistant Superintendent Human Resources and Development
Re: **Notification of Reasonable Assurance of Employment 2022/23 School year**

Newly-Hired Substitute Employees

You are hereby notified that you have reasonable assurance to return to work in a substitute capacity after the close of all holiday and recess periods during the current school year (2022/23). Your services will not be needed during the recess periods.

Primary Position:

Substitute Teacher (Certificated)

Employee Name (please print)

Date

Employee Signature

Please note: Substitute teachers must complete at least one assignment every 90 days in order to remain active in our substitute teacher pool. If you do not complete at least one assignment in a 90 day period, you will be removed from our substitute teacher pool.

INSTRUCTIONS FOR PREVENTING INJURIES AND RESPONDING TO INJURIES AT WORK

KEENAN SAFE SCHOOLS

Complete the recommended courses on **Keenan Safe Schools at <https://sanmarcosusd-keenan.safeschools.com/login>** . See the attached list for the occupation specific courses. Upon completion of your courses return the certificates of completion to Human Resources. Every employee is welcome to review and take any and all training courses available on the Keenan Safe Schools Platform.

INJURY & ILLNESS PREVENTION

Please review the District's Injury and Illness Prevention Plan (IIPP) located in the employee handbook. This can also be found on the District's website under Risk Management and at every school site front desk. It is important to the District you are provided the training and tools needed to safely and skillfully do your job. You play a vital role in ensuring safe work practices to prevent injury and illness in the work place.

REPORTING A WORKPLACE HAZARD:

If you would like to report a workplace hazard please contact Risk Management or refer to the Hazard Communication Plan with the District Injury & Illness Prevention Plan (IIPP).

IF YOU ARE INJURED AT WORK:

Report the injury or illness to your supervisor immediately. If you are unable to notify your supervisor please contact Risk Management. Your supervisor or Risk management will give you the following forms to complete:

- Employee's Workers' Compensation Packet – Instructions for Injured Workers

NEW HIRE PAMPHLET:

In the event of a work-related injury, this information includes important details regarding workers' compensation benefits.

IF YOU WOULD LIKE TO PRE-DESIGNATE YOUR OWN PHYSICIAN:

In the event of a work-related injury, you may elect to be treated by your own treating physician. You and your primary treating physician must fill out and complete the Pre-Designation Form (attached). This form must be on file with Human Resources & Risk Management prior to a work-related injury or illness for authorized treatment.

MEDICAL PROVIDER NETWORK:

Please review the attached Covered Employee Notification of Rights Materials. This information includes important details regarding the District's Medical Provider Network.

HANDS ON TRAINING:

You will be provided with hands on training to learn how to work safely and accurately within your position.

SIGNATURE CONFIRMATION PAGE:

Please initial and sign where indicated on the attached Signature Confirmation Page which confirms you have received a copy of these instructions and all related materials have been provided to you.

**** "Workers' Compensation Fraud is a felony" -anyone who knowingly files or assists in the filing of a false workers' compensation claim may be fined up to \$150,000 and imprisoned for up to five years (Insurance Code section 1871.4) *****

Signature Confirmation Page
San Marcos Unified School District

Please initial next to the following statements confirming your receipt of the New Employee Instructions and the related materials:

_____ I have received instructions for completing the recommended courses on the District's Keenan SafeSchools website. I further understand that all training in Keenan Safe Schools is available to me.0

_____ I have received and reviewed the District's Injury & Illness Prevention Plan to include the following program plans:

- Bloodborne Pathogens -Exposure Control Plan
- Heat Illness Prevention
- Hazard Communication Plan
- Fire Prevention Plan
- Lock Out/Tag Out Plan
- Medical waste Disposal Plan - Sharps & Pharmaceuticals

_____ I have received instructions for reporting a workplace hazard.

_____ I have received instructions for reporting a work-related injury or illness.

_____ I have received and reviewed the New Hire Pamphlet for work-related injury or illness.

_____ I have received instructions for pre-designating my treating physician for a work-related injury or illness.

Please print your name, sign, and date below.

Employee Name (Please Print)

Employee Signature

Date

San Marcos Unified School District

workers' compensation: Pre-Designation of Personal Physician

If you have health insurance and you are injured on the job you have the right to be treated immediately by your personal physician (M.D., D.O), or medical group, if you notify your employer, in writing, prior to the injury. Per Labor Code 4600 to qualify as the your predesignated, personal physician, the physician must agree, in writing, to treat you for a work related injury, must have previously directed your medical care and must retain your medical history and records. Your predesignated physician must be a family practitioner, general practitioner, board certified or board eligible internist, obstetrician-gynecologist or pediatrician. Your "personal physician" may be a medical group if it is a single corporation or partnership composed of licensed doctors or medicine or osteopathy, which operates an integrated multi-specialty medical group providing comprehensive medical services predominantly for non-occupational illnesses and injuries.

This is an optional form that can be used to notify your employer of your personal physician. You may choose to use another form, as long as you notify your employer, in writing, prior to being injured on the job and provide written verification that your personal physician meets the above requirements and agrees to be predesignated. Otherwise, you will be treated by one of your employers' designated workers' compensation medical providers.

EMPLOYEE NAME & ADDRESS:

I acknowledge receipt of this form and elect not to predesignate my personal physician at this time. I understand that I will receive medical treatment from my employers' medical provider. I understand that, at any time in the future, I can change my mind and provide written notification of my personal physician. I understand that the written notification must be on file prior to an industrial injury.

Employee Signature: Date:

If I am injured on the job, I wish to be treated by my personal physician*:

Name of Physician or Medical Group Phone Number

Address

*This physician is my personal primary care physician who has previously directed my medical care and retains my medical history and records.

Name of Insurance Company, Plan, or Fund providing health coverage for nonoccupational injuries or illnesses:

Employee Signature: Date:

A Personal Physician must be willing to be predesignated and treat you for a workers' compensation injury. The remainder of this form is to be completed by your physician and returned to your Employer.

PERSONAL PHYSICIAN ACKNOWLEDGEMENT

Per Labor Code 4600 to qualify you must meet the criteria outlined above. You are not required to sign this form, however, if you or your designated employee, does not sign, other documentation of the physicians' agreement to be predesignated will be required pursuant to Title 8, California Code of Regulations, section 9780.1(a)(3).

PERSONAL PHYSICIAN OR MEDICAL GROUP NAME:

I agree to treat the above named employee in the event of an industrial accident or injury. I meet the criteria outlined above. I agree to adhere to the Administrative Director's Rules and Regulations, Section 9785, regarding the duties of the employee-designated physician.

(Physician or Designated Employee of the Physician or Medical Group)

Date

Please return completed form to:

Human Resources/Risk Management 255 Pico Ave., San Marcos, CA 92069

email: Risk.Management@smusd.org or Fax (760) 75-1202

new hire pamphlet

If a work injury occurs

California law guarantees certain benefits to employees who are injured or become ill because of their jobs.

Any job related injury or illness is covered. Types of injuries include, but may not be limited to, strains, sprains, cuts, cumulative or repetitive traumas, fractures, illnesses and aggravations. Some injuries from voluntary, off duty, recreational, social or athletic activity may not be covered. Check with your supervisor or Keenan & Associates if you have any questions.

All work related injuries must be reported to your supervisor immediately. Don't delay. There are time limits. If you wait too long, you may lose your right to benefits. Your employer is required to provide you a claim form within one working day after learning about your injury.

It is a misdemeanor for an employer to discriminate against workers who are injured on the job or who testify in another employee's case. Any such employee may be entitled to compensation, reinstatement and reimbursement for lost wages and benefits.

Workers' compensation benefits include

Medical Care – All medical treatment, without a deductible or dollar limit. For dates of injury on or after 1/1/04 there is a limit of 24

chiropractic, 24 physical therapy and 24 occupational therapy visits. However this limit does not apply for post surgical treatments. Costs are paid directly by Keenan & Associates, through your employer's workers' compensation program, so you should never see a bill.

If emergency treatment is required go to the nearest emergency room or contact 911.

Keenan & Associates will arrange medical treatment, often by a specialist for the particular injury. Preferred Provider Networks may be utilized for physicians as well as medical care centers.

If you have health care coverage you are eligible to treatment with your personal physician or medical group should you become injured on the job. If you are eligible, **before you are injured**, you must notify your employer **in writing** and provide your employer **written** documentation from your personal physician or medical group that they agree to be predesignated. Your personal physician must be your regular primary care physician who previously directed your medical treatment, who retains your medical history and records. You may only predesignate your primary care physician if they are a family practitioner, general practitioner, board certified or board eligible internist, obstetrician-gynecologist, or pediatrician. Your personal physician may be a multispecialty medical group composed of licensed doctors or osteopathy providing medical services predominantly for non-occupational illness and injuries.

Your employer may be using a Medical Provider Network (MPN), which is a selected group of health care providers to provide treatment to

workers injured on the job. If you have predesignated a personal physician prior to your work injury, then you may receive treatment from your predesignated doctor. If you have not predesignated and your employer is using and MPN, you are free to choose an appropriate provider from the MPN list after the first medical visit directed by your employer or Keenan & Associates. If you are treating with a non-MPN doctor for an existing injury, you may be required to change to a doctor within the MPN. For more information, see the MPN contact information on reverse side.

If your employer **does not** participate in a Medical Provider Network (MPN) you may be able to change your treating physician to your personal chiropractor or acupuncturist. Generally your employer, or Keenan, has the right to select your treating physician within the first 30 days after your employer knows of your injury or illness. After your employer, or Keenan, initiates treatment you may, upon request, have your treatment transferred to your personal chiropractor or acupuncturist. To be eligible you must notify your employer **in writing prior to being injured**. However, a chiropractor cannot be your treating physician after receiving 24 chiropractic office visit.

Your employer will provide you with a form to use an optional method to predesignate your personal physician.

Contact Keenan & Associates if you plan to change physicians at any time.

Payment for Lost Wages - If you're temporarily disabled by a job injury or illness, you'll receive tax-free income until your doctor says you are able to return to work. Payments are two-thirds of your average weekly pay, up to

a maximum set by state law. Payments aren't made for the first three days unless you are hospitalized in an inpatient basis or unable to work more than 14 days.

If the injury or illness results in permanent disability, additional payments will be made after recovery. If the injury results in death, benefits will be paid to surviving, eligible dependents.

Rehabilitation – For dates of injury on or after 1/1/04 - you may be entitled to a **Supplemental Job Displacement Voucher**, which entitles you to a voucher for educational training.

MPN Information

Harbor Health Systems MPN Contact
(888) 626-1737
MPNcontact@harborsys.com

How to obtain additional information

Contact your employer representative or Keenan & Associates if you have questions about workers' compensation benefits. You may also contact an Information and Assistance Officer at the State Division of Workers' Compensation. You can consult an attorney. Most attorneys offer one free consultation. If you decide to hire an attorney, his or her fee will be taken out of some of your benefits. For names of workers' compensation attorneys, call the State Bar of California at 415-538-2120.

Department of Workers' Compensation Information and Assistance Offices

You can get free information from a state Division of Workers' Compensation Information & Assistance Officer. The phone numbers are listed below. Hear recorded information by calling toll-free 800-736-7401 or visit www.dwc.ca.gov.

Anaheim	714-414-1804
Bakersfield	661-395-2514
Eureka	707-441-5723
Fresno	559-445-5355
Goleta	805-968-4158
Long Beach	562-590-5001
Los Angeles	213-576-7389
Marina Del Rey	310-482-3858
Oakland	510-622-2861
Oxnard	805-485-3528
Pomona	909-623-8568
Redding	530-225-2047
Riverside	951-782-4347
Sacramento	916-928-3158
Salinas	831-443-3058
San Bernardino	909-383-4522
San Diego	619-767-2082
San Francisco	415-703-5020
San Jose	408-277-1292
San Luis Obispo	805-596-4159
Santa Ana	714-558-4597
Santa Rosa	707-576-2452
Stockton	209-948-7980
Van Nuys	818-901-5367

Keenan & Associates adjusting locations

Torrance
800-654-8102

Eureka
707-268-1616

Pleasanton
925-225-0611

Rancho Cordova
800-343-0694

Redwood City
650-306-0616

Riverside
800-654-8347

San Jose
800-334-6554

Anyone who knowingly files or assists in the filing of a false workers' compensation claim may be fined up to \$150,000 and sent to prison for up to five years.
[Insurance Code Section 1871.4]

STAFF WELLNESS PROGRAM



DEAR STAFF,

We care about your well-being and partnered with Care Solace, a mental health care coordination service, to help you and your family connect to quality care. This is a free resource for you and your family paid for and provided by **San Marcos Unified School District**.

If you are looking for help with mental health or substance use, Care Solace will quickly and confidentially find available providers matched to your needs.

care/solace.

888-515-0595

[caresolace.com/
sanmarcos](https://caresolace.com/sanmarcos)



COMPLETE SUPPORT

A multilingual team is available 24/7/365 to help you understand options, call providers on your behalf, and schedule an appointment.



PERSONALIZED CARE

Connect to providers matched to your needs and find in-person, teletherapy, and residential options.



EASY ACCESS TO CARE

Use Care Match, a self-serve website, to find a provider on your own.

Please note: Care Solace is not an emergency response service or mental health services provider. In the event of a life threatening emergency, call 9-1-1 or the National Suicide Hotline 9-8-8.

**EMPLOYERS MUST PROVIDE THIS INFORMATION TO NEW WORKERS
WHEN HIRED AND TO OTHER WORKERS WHO ASK FOR IT**

**RIGHTS OF VICTIMS OF DOMESTIC VIOLENCE,
SEXUAL ASSAULT AND STALKING**

Your Right to Take Time Off:

- You have the right to take time off from work to get help to protect you and your children's health, safety or welfare. You can take time off to get a restraining order or other court order.
- If your company has 25 or more workers, you can take time off from work to get medical attention or services from a domestic violence shelter, program or rape crisis center, psychological counseling, or receive safety planning related to domestic violence, sexual assault, or stalking.
- You may use available vacation, personal leave, accrued paid sick leave or compensatory time off for your leave unless you are covered by a union agreement that says something different. Even if you don't have paid leave, you still have the right to time off.
- In general, you don't have to give your employer proof to use leave for these reasons.
- If you can, you should tell your employer before you take time off. Even if you cannot tell your employer before, your employer cannot discipline you if you give proof explaining the reason for your absence within a reasonable time. Proof can be a police report, court order or doctor's or counselor's note or similar document.

Your Right to Reasonable Accommodation:

- You have the right to ask your employer for help or changes in your workplace to make sure you are safe at work. Your employer must work with you to see what changes can be made. Changes in the workplace may include putting in locks, changing your shift or phone number, transferring or reassigning you, or help with keeping a record of what happened to you. Your employer can ask you for a signed statement certifying that your request is for a proper purpose, and may also request proof showing your need for an accommodation. Your employer cannot tell your coworkers or anyone else about your request.

Your Right to Be Free from Retaliation and Discrimination:

Your employer cannot treat you differently or fire you because:

- You are a victim of domestic violence, sexual assault, or stalking.
- You asked for leave time to get help.
- You asked your employer for help or changes in the workplace to make sure you are safe at work.

You can file a complaint with the Labor Commissioner's Office against your employer if he/she retaliates or discriminates against you.

For more information, contact the California Labor Commissioner's Office. We can help you by phone at 213-897-6595, or you can find a local office on our website: www.dir.ca.gov/dlse/DistrictOffices.htm. If you do not speak English, we will provide an interpreter in your language at no cost to you. This Notice explains rights contained in California Labor Code sections 230 and 230.1. Employers may use this Notice or one substantially similar in content and clarity.

[Click Here for COVID-19 Related Resources](#)

FISCAL REPORT

Required Annual Employee Notices

 **BY CHARLENE QUILAO**

 **BY SUZANNE SPECK**

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posted August 24, 2021

Local educational agencies (LEAs) are required by state and federal law, including the California Education Code, as well as policies adopted by the governing board to send required notices to employees on an annual basis. It is also the responsibility of the employer to clearly communicate policies and laws which impact employment and are related to health and safety issues. In cases where notification is mandated by the law or local policy, employees should sign an acknowledgement of receipt of the notification. The acknowledgement of receipt provides verification that the employee has received the mandated information and understands their rights and responsibilities.

These requirements have no relationship to the employee's work location. So, as we begin the 2021–22 school year, and whether you have employees who are continuing to work remotely due to COVID-19 or not, you have to issue annual legal notices again this year. The charts below identify notices that employers are required to provide to all employees annually and those that are required upon initial hire.

Newly Hired Employees

Employee Notification(s)	Legal Reference
<ul style="list-style-type: none"> • Oath or affirmation of allegiance required of public employees 	Government Code (GC) § 3102
<ul style="list-style-type: none"> • Workers' Compensation benefits 	Labor Code § 3551
<ul style="list-style-type: none"> • Disability insurance rights and benefits (and when employee goes on leave for specified reasons) 	Unemployment Insurance Code § 2613

Employee Notification(s)	Legal Reference
<ul style="list-style-type: none"> • Benefits through Family and Medical Leave Act and California Family Rights Act 	Code of Federal Regulations (CFR) 825.300 California Code of Regulations (CCR) § 11096

All Employees Upon Initial Hire and Annually Thereafter

Employee Notification(s) and Training(s)	Legal Reference
<ul style="list-style-type: none"> • Uniform complaint procedures, complaints about student fees, and Local Control and Accountability Plan 	Education Code Section (EC §) 49013 CCR § 4622
<ul style="list-style-type: none"> • District's drug- and alcohol-free workplace available employee assistance programs 	GC § 8355 41 United States Code § 8102
<ul style="list-style-type: none"> • Use of pesticide product, active ingredients, Internet address to access information <p><i>Pest Management Training Required:</i> All school staff using disinfectant wipes and staff who apply or are exposed to pesticides during the course of work must participate in training annually to learn about the safe use of pesticides around children</p>	EC § 17612 Senate Bill (SB) 1405 (Chapter 848/2014)
<ul style="list-style-type: none"> • AIDS and Hepatitis B Policies and Administrative Regulations 	Health and Safety Code § 120875 and § 120880
<ul style="list-style-type: none"> • Status as a Mandated Reporter of Child Abuse, Reporting Obligations, Confidentiality Rights, Copy of Law <p><i>Mandated Reporter Training Required:</i> All employees are required to complete a Mandated Reporter Training within the first six weeks of every school year and for each new hire within six weeks of their hire date (Assembly Bill 1432)</p>	Penal Code § 11165.7 and § 11166.5

Employee Notification(s) and Training(s)	Legal Reference
<ul style="list-style-type: none"> Exposure Control Plan for Blood Borne Pathogens <p><i>Bloodborne Pathogen Exposure Training Required: All employees must receive bloodborne pathogens training once each year</i></p>	CCR § 5193
<ul style="list-style-type: none"> Sexual Harassment <p><i>Sexual Harassment Training Required: Two hours of sexual harassment training must be provided to staff in supervisory positions. Additionally, employers are also required to provide one hour of sexual harassment training to all nonsupervisory staff, including seasonal and temporary employees</i></p>	SB 1343 (Chapter 956/2018) GC § 12950.1(h)(1)
<ul style="list-style-type: none"> Availability of Asbestos Management Plan; Any Inspections, Response Actions or Post-Response Actions Planned or in Progress 	CFR 763.84 and 763.93
<ul style="list-style-type: none"> Request for volunteers to be trained to administer epinephrine auto-injectors 	EC § 49414
<ul style="list-style-type: none"> Request for volunteers to administer emergency antiseizure medications; training to be provided 	EC § 49414.7
<ul style="list-style-type: none"> District's policy on nondiscrimination and related compliant procedures 	CFR § 104.8 and § 106

Certificated Employees Upon Hire

Employee Notification(s)	Legal Reference
<ul style="list-style-type: none"> Criteria for membership in retirement system; right to elect membership 	EC § 22455.5
<ul style="list-style-type: none"> Post retirement compensation limitation 	EC § 22461

Employee Notification(s)	Legal Reference
<ul style="list-style-type: none"> • Employment status and salary 	EC § 44916

Certificated Employees Annually

Employee Notification(s)	Legal Reference
<ul style="list-style-type: none"> • District regulations related to performance evaluations 	EC § 35171
<ul style="list-style-type: none"> • Copy of employee's evaluation (30 days before last day of the school year for instructional staff, or by June 30 for noninstructional certificated staff, in any year in which employee is evaluated) 	EC § 44663
<ul style="list-style-type: none"> • Notice and description of the unsatisfactory performance (to an employee with an unsatisfactory evaluation) 	EC § 44664

Classified Employees Upon Hire or Upon Change in Classification

Employee Notification(s)	Legal Reference
<ul style="list-style-type: none"> • Employee's class specification, salary data, assignment or work location, duty hours, prescribed workweek (also required upon each change in classification) 	EC § 45169

In addition to what is required by local policies and state law, there are COVID-19 notifications that employers should consider adding to the annual notifications packet this year, including, but not limited to, the following:

- Families First Coronavirus Response Act (FFCRA) and Emergency Paid Sick Leave (EPSL)—Notifications of these leave entitlements are required, and hopefully everyone provided notifications to employees earlier this year. As the new school year begins, providing another notice is a good practice and provides an opportunity for the LEA to inform employees of agency procedures for requesting FFCRA and EPSL eligible leave. More information regarding FFCRA posting requirements can be found [here](#).
- COVID-19 policies and procedures related to returning to work and telecommuting, cleaning and social distancing procedures, safety protocols, reporting COVID-19 related illnesses and exposure, and

temperature screening or self-certification procedures should be communicated to all employees.

- **Employee Assistance Program (EAP)**—The COVID-19 pandemic has disrupted every aspect of our daily lives creating significant stress and uncertainty. Consider reminding employees of the benefits available through the EAP. EAPs provide support to employees—and often their families—through confidential counseling sessions. Be sure that any notification includes a list of services available as well as information on how to access these services.

Employers must establish a process by which all legally required annual notifications, and optional COVID-19 related notices, are provided and documented. Due to the number of documents in the annual notification packet, it is recommended that LEAs consider utilizing an electronic process. While this may have been a consideration in the pre-pandemic environment, now more than ever, electronic notifications comply with health and safety measures. Digitizing processes which require a large amount of documentation also increases organizational efficiency and reduces the environmental footprint.

Also keep in mind that there may be additional training and notice requirements contained in local board policies and administrative regulations. More information regarding employee notifications can be accessed in the California School Boards Association Sample Board Policy 4312.9, Employee Notifications (<https://www.csba.org/ProductsAndServices/AllServices/Gamut.aspx>).

Annual notices to employees, while seemingly redundant year-after-year-after-year, are an essential human resource function and should be taken seriously. Failure to provide adequate notice to employees of their obligations under the law creates unnecessary risks. Providing required notices to employees is about more than meeting legal requirements; it is also, and perhaps more importantly, about creating a culture of accountability. With the new school year either ahead of you or just in the rear-view mirror, there is no better time to beginning planning the process and method for providing employees with required legal notices and renewing your agency's commitment to creating a culture of accountability.

SUBSTITUTE TEACHER NEW HIRE CHECKLIST

SUBMISSION CHECK (✓) OFF	THESE DOCUMENTS <u>MUST</u> HAVE PREVIOUSLY BEEN SUBMITTED (ATTACHED) ONLINE ON Edjoin.org :	HR USE ONLY
	Employment Application	
	Valid Credential or 30-Day Emergency Substitute Permit	
SUBMISSION CHECK (✓) OFF	In order to be invited to our <u>New Hire Orientation</u>, you <u>must BRING ALL THE FOLLOWING DOCUMENTS</u> to Human Resources and <u>Development</u> before the <u>DEADLINE</u> shown on the email you received.	HR USE ONLY
	Driver's License	
	Signed Social Security Card	
	Negative TB Test Results (administered within last 60 days)	
	Proof of Fingerprint Clearance in San Diego County Office of Education System	
	New Hire/Emergency Information Form	
	Mandated Reporter Training - Completion Certificate (received by email after completion of <i>online</i> course)	
	Annual Notification Packet Acknowledgement Form (sign this form after reading required documents)	
	Technology Responsible Use Policy Agreement	
	Employment Eligibility Verification- I-9 Section 1 [1 st page]	
	Oath of Allegiance and Citizenship	
	W-4 Form	
	Direct Deposit Form - Optional	
	Beneficiary Designation Form	
	Voluntary Information Form - Optional	
	Retirement System and Social Security System Disclosures	
	CALSTRS Membership	
	CALSTRS Retirement System Election (complete <u>only</u> if you are already a CALSTRS or CALPERS Member)	
	Reasonable Assurance of Employment	
	Pre-designation of Personal Physician-Workers' Compensation - Optional	
	Workers' Compensation Benefits - Signature Confirmation Page	
	Certification of Freedom from Contagious or Infectious Disease <i>(RETIRED teachers only - this form is REQUIRED)</i>	