

INFORMATION AND INSTRUCTIONS

2020 W-4 FORM

According to the IRS, the 2020 W-4 Form has been redesigned to reduce the form's complexity and to increase transparency and accuracy in the withholding system. Beginning with the 2020 Form W-4, employees will no longer be able to request adjustments to their withholding using withholding allowances. Instead, using the new Form W-4, employees will provide employers with amounts to increase or decrease the amount of taxes withheld and amounts to increase or decrease the amount of wage income subject to income tax withholding.

Steps 1 and 5:

Step 1 – Personal Information:

Employees must enter the requested personal information - Name as stated in Skyward, address, social security number, and filing status.

Step 5 – Signature and Date:

Employees must sign and date the 2020 W-4 Form.

For employees who don't complete any steps other than Step 1 and Step 5, the Payroll Department will withhold the amount based on the filing status, wage amounts, and pay period.

Complete steps 2, 3, and/or 4 only if relevant to your personal situation:

Employees completing one or more of steps 2, 3, and/or 4 on Form W-4, adjustments are as follows.

Step 2 – Multiple Job or Spouse Works:

If the employee checks the box in Step 2, withholding will be calculated from the "Form W-4, Step 2, Checkbox" column in the Percentage Method or Wage Bracket Method tables. This will mean higher withholding for the employee. If the employee chooses one of the other two alternatives from this step, the higher withholding will be included with any other additional tax amounts per pay period in Step 4(c).

Step 3 – Claim Dependents:

The previous W-4 used allowances based on personal exemptions in the tax return. The new W-4 uses dollar amounts. Multiply the number of qualifying children under age 17 or the number of dependents by the appropriate amount and add the two numbers together if applicable. Write the total amount on this line as the **annual** reduction in the amount of withholding. The higher the amount claimed for dependents, the lower the amount of federal withholdings deducted from your check per pay period.

Steps 4(a) – Other Income (not from jobs):

Enter the amount of other income that did not have tax withheld during the year on this line. This may include interest, dividends, retirement income, etc. Entering an amount on this line, will increase the amount of federal withholdings.

Steps 4(b) – Deductions:

Enter the amount of any deductions other than standard deductions like mortgage interest or charitable contributions minus the standard deduction. Entering an amount on this line will reduce the annual amount of wages subject to income tax withholding by the **annual** amount shown on Step 4(b). Entering an amount on this line will decrease the amount of federal withholdings.

Step 4(c) – Extra Withholding:

Enter any additional tax amount you want withheld per **pay period on this line.**

Exemption from withholding:

Employees who are claiming “Exemption” need to write “Exempt” on the line below Step 4(c) in order not to have any federal income tax withheld from their paychecks except in the case of certain supplemental wages.

Must Complete Steps 1 & 5

Step 1: Enter Personal Information

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(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 widow(er))		
<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, when to use the online estimator, 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) Use the estimator at www.irs.gov/W4App for most accurate withholding for this step (and Steps 3-4); or

(b) Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below for roughly accurate withholding; 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 accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld.

TIP: To be accurate, submit a 2020 Form W-4 for all other jobs. If you (or your spouse) have self-employment income, including as an independent contractor, use the estimator.

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 Dependents

If your 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 and 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)** \$ _____

If claiming exempt, write EXEMPT here

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**

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