

Campus Box 0580 Normal, IL 61790-0580 Phone: (309) 438-7677 Fax: (309) 438-3357 Payroll.IllinoisState.edu

# Completing Federal Form W-4 Revised 01/19/23

## **Completing Federal Form W-4**

- If you are a new employee after January 1st and you do not submit a valid Form W-4, taxes will be withheld as if you are a single filer with no adjustments (per IRS regulations)
- If you are a current employee with a valid W-4 already on file, your withholding will continue based on your previously submitted form
- A new W-4 form can be completed any time an employee's personal or financial situation changes

## Required Steps (1 & 5)

## **Step 1:** Personal Information

- 1. Name
- 2. Social Security Number
- 3. Address
- 4. City, State and Zip Code
- 5. Filing Status

Form W-4  Department of the Ti Internal Revenue Ser	reasury	► Complete Form W-4 so that your	ee's Withholding Certificate remployer can withhold the correct federal incom Give Form W-4 to your employer. rithholding is subject to review by the IRS.	e tax from your pay.	OMB No. 1545-0074			
Step 1: Enter Personal Information	Addre	irst name and middle initial ess r town, state, and ZIP code	Last name	► Do nam card credi SSA	(b) Social security number  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.			
	(c)	(c) Single or Married filing separately Married filing jointly (or Qualifying widow(er)) 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.)						

(a) Enter Full Name(b) Enter Your Social Security Number

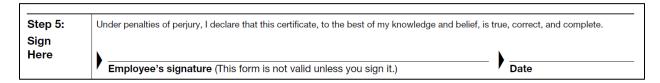
Enter Your Mailing Address (c) Check Your Filing Status



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## Step 5: Sign and Date



The form is not valid unless signed. Invalid forms require your employer calculate your withholding as "Single."

#### Optional Steps (2, 3 & 4)

- For maximum accuracy and privacy, use the Tax Withholding Estimator at www.irs.gov/W4app
- For multiple jobs, you will generally be guided to enter an additional amount to withhold in Step 4(c)
  - While you will need to know the approximate amount of pay for each job, you will enter the additional amount of withholding in Step 4(c) on the Form W-4 for only one of the jobs
  - If pay for any of the jobs changes significantly, you will need to use the Tax
     Withholding Estimator again and furnish a new Form W-4 to change the amount in Step 4(c) to have accurate withholding

#### Step 2: Multiple Jobs

- Individuals may select one of three options:
  - 1. Use the Tax Withholding Estimator
  - 2. Use the Multiple Jobs Worksheet on page 3 of the form
  - 3. Check box 2(c)
    - a. Checking box 2(c) tells your employer that you have multiple jobs
    - b. If you don't want to disclose that fact, don't check the box
- In this step, the form notes that individuals with multiple jobs should complete Form W-4
  with the information from their highest-paying job to result in the most accurate
  withholding
- If you work more than one job, steps 3 through 4b should only be completed on one W-4 form



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Step 2: Multiple Jobs	Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spous also works. The correct amount of withholding depends on income earned from all of these jobs.				
or Spouse	Do <b>only one</b> of the following.				
Works	(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; of				
	(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 optio is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld ▶ □				
	<b>TIP:</b> To be accurate, submit a 2020 Form W-4 for all other jobs. If you (or your spouse) have self-employmer income, including as an independent contractor, use the estimator.				

## Step 3: Claim Dependents

#### Employees can:

- Calculate the child and dependent credits on the face of the form
- Add other credits to the total

Step 3:	If your income will be \$200,000 or less (\$400,000 or less if married filing jointly):		
Claim Dependents	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: Other Adjustments

- Step 4 (a):
  - Additional income that might not be subject to withholding, such as dividends or retirement income
- Step 4 (b):
  - Itemized deductions like mortgage interest and charitable contributions that will exceed your standard deduction
  - Individuals complete the Deductions Worksheet on page 3 and enter the result in Step 4b

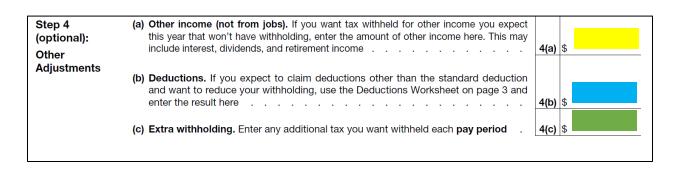


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#### • Step 4 (c):

- Any additional taxes that you would like to withhold each pay period
- Employees can enter the amount the Tax Withholding Estimator recommends
- o Employees can enter the amount from the Multiple Jobs Worksheet on page 3
- Employees can enter an amount of extra withholding to get a refund or cover other income



#### NOTES:

- Individuals eligible to claim exemption from withholding enter "Exempt" in the space below Step 4(c)
- Nonresident alien (NRA) employees subject to the special rules described in Notice 1392 enter "NRA" in the space below Step 4(c)
- Employees that are not United States citizens or lawful permanent residents should schedule an appointment with the Payroll Office for assistance in completing their W-4
- If you do not have a social security number, you should not fill out a W-4. Once
  you get your SSN, you should schedule an appointment with the Payroll Office for
  assistance in completing your W-4.