



Completing Federal Form W-4  
Revised 01/14/20

Completing 2020 Form W-4

- If you are a new employee after January 1, 2020 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 <b>W-4</b> Department of the Treasury Internal Revenue Service	<b>Employee's Withholding Certificate</b>		OMB No. 1545-0074
	▶ 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.		<b>2020</b>
<b>Step 1: Enter Personal Information</b>	(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 <a href="http://www.ssa.gov">www.ssa.gov</a> .
	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.)		

- (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

<b>Step 5: Sign Here</b>	Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.
	<p>▶ _____ ▶</p> <p><b>Employee's signature</b> (This form is not valid unless you sign it.) <b>Date</b></p>

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](http://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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**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.

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**Step 2:** 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.

**Multiple Jobs or Spouse Works** Do **only one** of the following.

(a) Use the estimator at [www.irs.gov/W4App](http://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.

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**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**

Employees can:

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

<b>Step 3:</b>	If your income will be \$200,000 or less (\$400,000 or less if married filing jointly):		
<b>Claim Dependents</b>	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 . . . . .	<b>3</b>	\$ _____

**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

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



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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
  - 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

<b>Step 4 (optional): Other Adjustments</b>	(a) <b>Other income (not from jobs).</b> 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) <b>Deductions.</b> 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) <b>Extra withholding.</b> Enter any additional tax you want withheld each <b>pay period</b> . . . . .	4(c) \$	

**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.**