



FEDERAL W-4 FORM

JOB AID PY-12 | INFOTYPE 0210

PY

The purpose of this Job Aid is to provide a brief overview of the updated 2023 Federal W-4 Form and describe the process for entering data from the form using Infotype 0210 in the Integrated HR-Payroll System.

Background Information

The Internal Revenue Service (IRS) requires individuals who want to change their withholdings on or after 12/24/2019, or individuals hired after 12/24/2019, to complete an updated Federal W-4 Form.

Overview of the W-4 Form

The updated [Federal W-4 Form](#) (including instructions) is available on the IRS website. The following sections briefly review the steps on the form (shown below). An employee needs to carefully read the instructions included in the W-4 form before completing it and MUST complete Step 1 and Step 5. The employee should complete Steps 2–4 ONLY if they apply.

If the employee has questions about the W-4 form, refer them to the IRS [About Form W-4, Employee's Withholding Certificate](#). **Please do not provide tax advice to employees.**

Step 1: Enter Personal Information

The employee MUST enter their personal information.

Step 2: Multiple Jobs or Spouse Works

The employee may complete this step, following the instructions on the W-4 form, if they (1) hold more than one job at a time, or (2) are married filing jointly and their spouse also works.

Step 3: Claim Dependents

The employee may complete this step to claim tax credits for dependents by following the instructions on the W-4 form.

Step 4: (optional): Other Adjustments

The employee may choose to calculate other income, claim itemized deductions, or withhold additional taxes each pay period by following the instructions on the W-4 form.

Claimed Exemption: The employee may choose to claim an exemption from federal withholding by carefully following the instructions on page 2 of the W-4 form. They must submit a new W-4 each year they wish to claim the exemption.

You will follow the instructions in [Job Aid PY-17](#) to correctly process this exemption in the Integrated HR-Payroll System.

Step 5: Sign Here

The Federal W-4 Form is not valid unless it is signed and dated by the employee. If the employee completes a paper form, they MUST turn in a signed and dated original form. If the employee completes the form directly in the Integrated HR-Payroll system, they MUST use an electronic signature.

Note: Employees claiming "Exempt" status must complete a paper form.

Employers Only

The employer should enter the agency name, employee's 1st date of employment, and the agency tax ID.

Form W-4 Employee's Withholding Certificate 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. **2023**

Department of the Treasury Internal Revenue Service

Step 1: Enter Personal Information

(a) First name and middle initial Last name (b) Social security number

Address

City or town, state, and ZIP code

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) Single or Married filing separately
 Married filing jointly or Qualifying surviving spouse
 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)

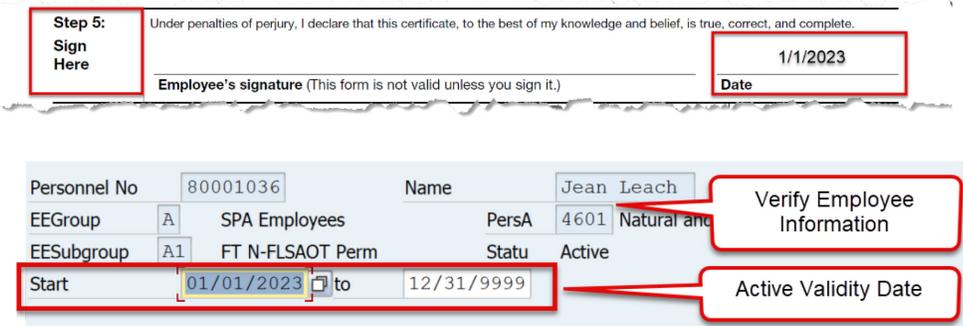
For Privacy Act and Paperwork Reduction Act Notice, see page 3. Cat. No. 102200 Form W-4 (2023)

Infotype 0210 Entries

In the Integrated HR-Payroll System, Infotype 0210 (Withholdings Info W4/W5 US) underwent changes on 12/24/2019 to reflect the new Federal W-4 Form changes. When entering employee information or verifying a IT0210 record, it is important to review all data, including the employee information in the header. The following sections discuss the important IT0210 areas to review and how to enter or validate that information based on information in an employee’s completed and signed W-4 form.

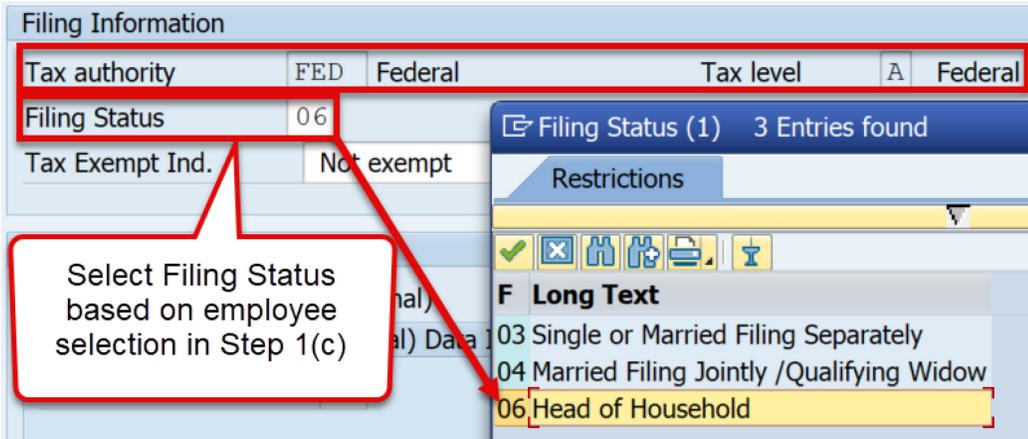
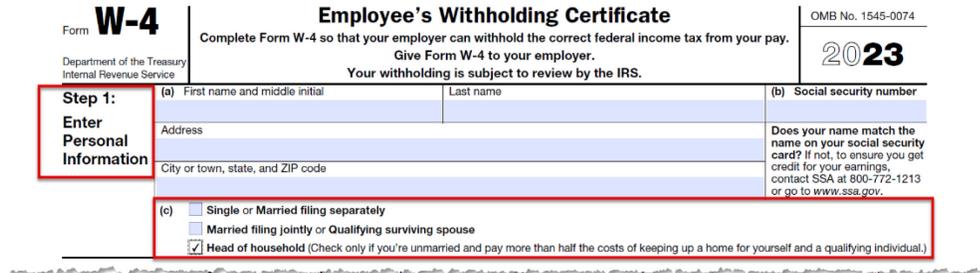
Header

The Validity date should be active and **Start** date should match the date on the signed W-4 form.



Filing Information

Select **FED** (Federal) for the **Tax authority** and **Tax level** will adjust automatically. **Filing Status** should reflect the employee selection on Step 1(c) of the W-4 form.



Withholding Format

Under **Redesigned (TCJA) Data Input**, check the box **Use Higher Withholding Rates Schedule** if the employee checked the box in Step 2(c) of the W-4 form.

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.

Redesigned (TCJA)

Redesigned (TCJA) Data Input

Use Higher Withholding Rates Schedule

Credits for dep. USD

Check Use Higher Withholding Rates Schedule if employee checked Step 2(c)

Under **Redesigned (TCJA) Data Input**, enter the total dollar amount listed by the employee on Step 3 of the W-4 form into the **Credits for dep.** field. The amount should be entered in US dollars and must be \$500 or more.

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** \$

Redesigned (TCJA)

Redesigned (TCJA) Data Input

Use Higher Withholding Rates Schedule

Credits for dep. USD

Enter the total dollar amount listed by the employee in Step 3

If the employee listed any **Other income (not from a jobs)** in Step 4(a) of the W-4 form, enter that amount in the **Other income** field under **Redesigned (TCJA) Data Input**.

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)** \$

Redesigned (TCJA)

Redesigned (TCJA) Data Input

Other income USD

Deductions USD

Enter the dollar amount listed by the employee in Step 4(a)

If the employee listed any **Deductions** in Step 4(b) of the W-4 form, enter that amount in the **Deductions** field under **Redesigned (TCJA) Data Input**.

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) \$

Redesigned (TCJA)

Redesigned (TCJA) Data Input

Other income		USD
Deductions		USD

Withholding adjustments

If the employee listed any **Extra withholding** in Step 4(c) of the W-4 form, enter that amount in the **Add. withholding** field.

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) \$

Withholding adjustments

Add. withholding		USD
Default formula	01 PCT MTHD-RES. U	

Change Record

- 2/10/20: Document created.
- 2/14/23: Updated formatting, text, and images for the 2023 form and changes in HRPY – A. Durrence