

## ESS – Payroll – W-4 Information

1. **W-4 Information** - Allows employees to manage their W-4 (federal withholding).

**NOTE: Employees who need to claim an *Exempt* status must contact their payroll office.**

- 1.1. Changes to W-4 are made by selecting *W-4 Tax Withholding* under *Payroll*.

- 1.2. Upon entering the screen, the *W-4 Information* section towards the bottom of the screen will be locked from editing. To begin making updates, select the button for *Update W-4 Withholding* at the top of the screen as illustrated.

### W-4 Withholding Information

**Selection and Overview**

Tax Authority	Filing Status	Valid From	Valid To
Federal	Married	3/17/2018	12/31/9999

**W-4 Details**

Tax Authority: Federal

**Personal Information**

First Name and Middle Initial:	<input type="text" value="John J"/>	Last Name:	<input type="text" value="Smith"/>
Home Address (Number and Street or Rural Route):	<input type="text" value="1 First Street"/>	City:	<input type="text" value="DUNCANNON"/>
State:	<input type="text" value="PA"/>	ZIP Code:	<input type="text" value="170209662"/>

**W-4 Information**

The fields below correspond to the steps in the 2020 IRS Form W-4. The IRS Form W-4 and instructions, linked below, should be used to determine the values for these fields.

Step 1c - Filing Status:	<input type="text" value="Single or Married filing separately"/>
Check this box if you have checked the box in Step 2c on the Form W-4:	<input type="checkbox"/>
Step 3 - Total Amount for Dependents:	<input type="text" value="0.00"/> USD
Step 4a - Other Income (Not From Jobs):	<input type="text" value="0.00"/> USD
Step 4b - Additional Deductions from Deductions Worksheet:	<input type="text" value="0.00"/> USD
Step 4c - Extra Withholding Each Pay Period:	<input type="text" value="80.00"/> USD

**Fields locked from editing**

- 1.3. Once the button for *Update W-4 Withholding* has been selected, the *W-4 Information* section will unlock for editing as illustrated.

**W-4 Information**

The fields below correspond to the steps in the 2020 IRS Form W-4. The IRS Form W-4 and instructions, linked below, should be used to determine the values for these fields.

Step 1c - Filing Status:

Check this box if you have checked the box in Step 2c on the Form W-4:

Step 3 - Total Amount for Dependents:  USD

Step 4a - Other Income (Not From Jobs):  USD

Step 4b - Additional Deductions from Deductions Worksheet:  USD

Step 4c - Extra Withholding Each Pay Period:  USD

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](http://www.ssa.gov).

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

To review the IRS Form W-4 and Instructions, click here: [IRS Website: W-4](#)

**Fields unlocked for editing**

### Form W-4 Field Descriptions and Instructions

The fields within the *W-4 Information* section directly correspond to the steps on the IRS Form W-4 2020 or later. It is recommended that employees refer directly to the Form W-4 and instructions to determine the values for the following fields on the screen.

**Step 1c – Filing Status:** choose the appropriate filing status for the Form W-4 from the drop-down menu.

**Check this box if you have checked the box in Step 2c on the Form W-4:** according to the Form W-4, use this checkbox “if there are only two jobs total...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.”

**Step 3 - Total Amount for Dependents:** the value entered here is calculated during Step 3: Claim Dependents and is the total from line 3 of the Form W-4. If you are not claiming credits for dependents, leave the default value of 0.00.

**Step 4a - Other Income (Not From Jobs):** the value entered here is calculated during Step 4 (optional): Other Adjustments and is the value from line 4(a) of the W-4 form. If you are not entering other income, leave the default value of 0.00.

**Step 4b - Additional Deductions from Deductions Worksheet:** the value entered here is calculated during Step 4 (optional): Other Adjustments and is the value from line 4(b) of the Form W-4. If you are not entering deductions, leave the default value of 0.00.

**Step 4c - Extra Withholding Each Pay Period:** the value entered here is calculated during Step 4 (optional): Other Adjustments and is the value from line 4(c) of the Form W-4. If you are not entering an additional amount, leave the default value of 0.00.

- 1.4. When entering dollar amounts in *Step 3*, *Step 4a*, *Step 4b*, or *Step 4c*, **it is critical not to use any special characters such as commas or dollar signs**. For example if entering \$6,000.00, it should be entered into the field as 6000 or 6000.00. The following table should be used as a guideline for entering dollar values within these four fields:

Dollar value to be entered:	Enter on the screen as:
0.00	0 or 0.00
10.00	10 or 10.00
100.00	100 or 100.00
1,000.00	1000 or 1000.00
10,000.00	10000 or 10000.00
100,000.00	100000 or 100000.00

NOTE: If an invalid character is entered, an error message will be displayed as illustrated. employees must correct the error as instructed above in step 1.4.


Step 4b - Additional Deductions from Deductions Worksheet:  USD


Step 4c - Extra Withholding Each Pay Period:  USD

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

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 Extra Withholding field contains invalid input please enter proper input value. Special characters such as commas and dollar signs are not permitted.

- 1.5. When finished entering changes, select the checkbox, “*Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete.*”

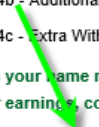
Step 4b - Additional Deductions from Deductions Worksheet:  USD

Step 4c - Extra Withholding Each Pay Period:  USD

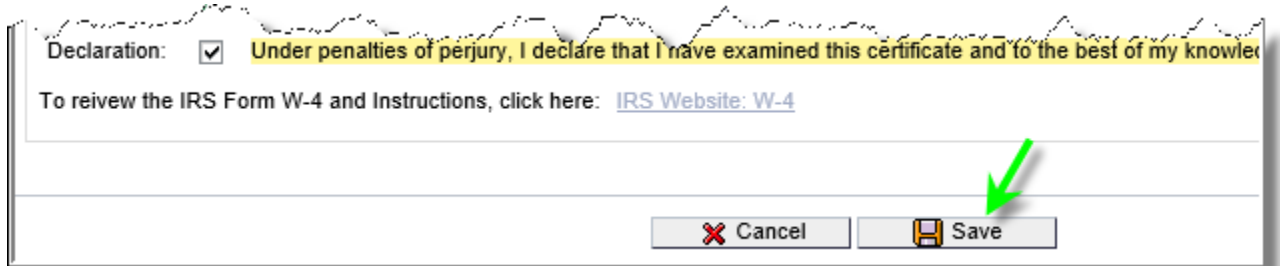
Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to [www.ssa.gov](http://www.ssa.gov).

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

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1.6. The Save button will now be activated. Select Save.



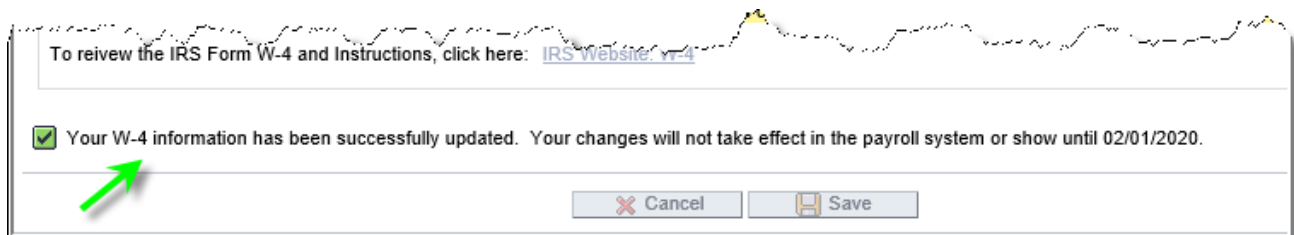
Declaration:  Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, the information furnished is true and correct.

To review the IRS Form W-4 and Instructions, click here: [IRS Website: W-4](#)

A green arrow points to the Save button.

NOTE: To cancel changes, select the *Cancel* button, which will reset the form to the original entries prior to making changes.

1.7. A confirmation message will appear indicating changes have been saved successfully. To make additional changes, repeat steps 1.2 through 1.6.



To review the IRS Form W-4 and Instructions, click here: [IRS Website: W-4](#)

Your W-4 information has been successfully updated. Your changes will not take effect in the payroll system or show until 02/01/2020.

A green arrow points to the Save button.

NOTE: Changes made are effective the first day of the next pay period. Once changes are submitted, the next pay period date is shown on the ESS screen. Please note previous pay period elections are preserved.