

# 2020 Employee's Withholding Certificate

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WHAT YOU NEED TO KNOW

The new form is very different from previous versions, reflecting the federal tax law changes that took place in 2018. According to the IRS, the newly designed form will provide better accuracy in withholding. So, while employees hired before 2020 are not required to complete the new Form W-4, the IRS strongly encourages all individuals to do so.

The form is available at <https://www.irs.gov/pub/irs-pdf/fw4.pdf> or from the UR Payroll Website at <https://controller.richmond.edu/forms/index.html>

When completing the W-4 on Banner Self-Service, you will need to refer to the actual IRS form, so be sure to have it available for reference.

The image shows a 2020 Form W-4, Employee's Withholding Certificate, tilted at an angle. The form is from the Department of the Treasury, Internal Revenue Service. It includes the following sections and instructions:

- Form W-4**: Employee's Withholding Certificate. 2020.
- Step 1: Enter Personal Information**: Includes fields for first name and middle initial, last name, address, and city or town, state, and ZIP code. It also has checkboxes for filing status: Single or Married filing separately, Married filing jointly (or Qualifying widower), and 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**: Instructions to complete this step if you hold more than one job at a time, or are married filing jointly and your spouse also works. It provides three options: (a) Use the estimator at [www.irs.gov/W4App](http://www.irs.gov/W4App), (b) Use the Multiple Jobs Worksheet on page 3, or (c) If there are only two jobs total, you may check this box. A tip states: "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."
- Step 3: Claim Dependents**: Instructions to multiply the number of qualifying children under age 17 by \$2,000 and other dependents by \$500. It includes a table for recording these amounts:

3	\$
4(a)	\$
4(b)	\$
4(c)	\$
- Step 4 (optional): Other Adjustments**: Includes instructions for (a) Other income (not from jobs), (b) Deductions (interest, dividends, and retirement income), and (c) Extra withholding.
- Step 5: Sign Here**: Includes a declaration under penalties of perjury, a signature line, and a date line. It also includes fields for the employer's name and address, first date of employment, and employer identification number (EIN).

# Changes to the Form W-4 include:

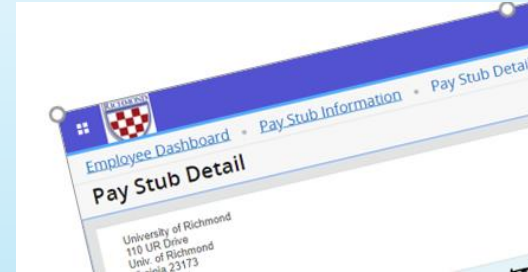
- Elimination of allowances
- A new marital status for “Head of Household.”
- Optional lines are included to consider “Additions to Income” and “Deductions.”

This image shows a 2019 Form W-4, titled "Employee's Withholding Allowance Certificate". It includes sections for "Step 1: Enter Personal Information" (name, address, marital status), "Step 2: Multiple Jobs or Spouse Works", "Step 3: Claim Dependents", "Step 4 (optional): Other Adjustments", and "Step 5: Sign Here". The form is dated 2019 and includes instructions for employers and employees.

This image shows a 2020 Form W-4, titled "Employee's Withholding Certificate". It includes sections for "Step 1: Enter Personal Information" (name, address, marital status), "Step 2: Multiple Jobs or Spouse Works", "Step 3: Claim Dependents", "Step 4 (optional): Other Adjustments", and "Step 5: Sign Here". The form is dated 2020 and includes instructions for employers and employees. The title "Employee's Withholding Certificate" is a key change from the previous year's "Allowance Certificate".

# What will I need to complete the new 2020 Form W-4?

A Recent Paystub (available on BannerWeb)



Your Previous Year's Tax Return

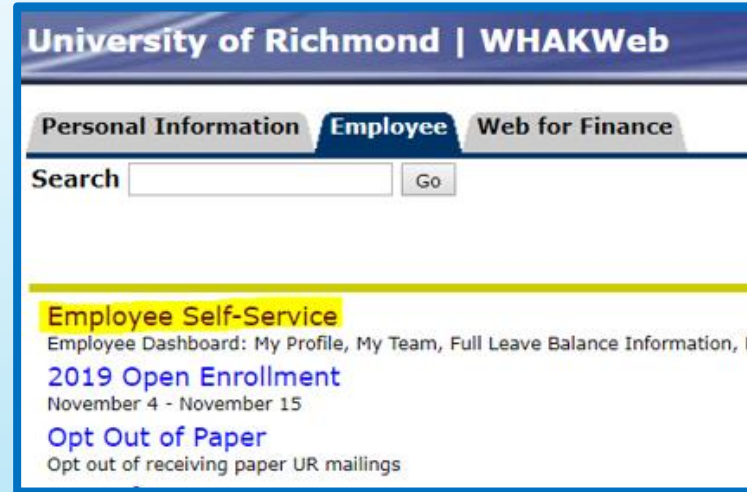
A screenshot of the 2018 Form 1040 U.S. Individual Income Tax Return. The form is from the Department of the Treasury—Internal Revenue Service. It includes fields for filing status (Single, Married filing jointly, Married filing separately, Head of household, Qualifying widow(er)), taxpayer information (first name and initial, last name, social security number), and spouse information (joint return, spouse's first name and initial, last name, social security number). It also includes checkboxes for standard deduction, dependent status, and health care coverage. The form is for the year 2018 and has OMB No. 1545-0074.

Information About Other Income (i.e. interest, dividends,... )

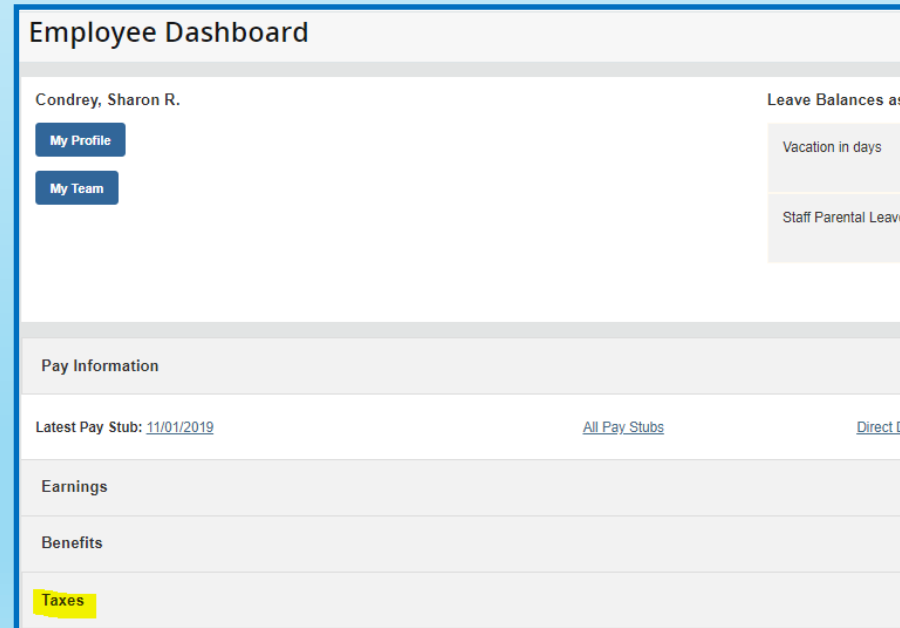


# Completing the W-4 on BannerWeb Employee Self Service

After logging into BannerWeb, select Employee and then Employee Self-Service




Select Taxes



You may have to scroll down the screen to view the tax information. Select W-4 Employee Withholding Allowance Certificate .

Taxes	
<b>Federal Withholding Tax</b>	<a href="#">W-4 Employee's Withholding Allowance Certificate</a>
Filing Status: Married	<a href="#">Electronic Regulatory Consent</a>
Status: Active	<a href="#">1095-C Employer Provided Health Insurance Offer and Coverage Statement</a>
Number of Allowances: 1	
Additional Withholding Amount: 600.00	
Dependent Amount:	
Other Income:	
Deductions:	
<b>Virginia State Withholding Tax</b>	
Status: Active	
#Exempt: 1	
Additional Withholding Amount:	

The W-4 Screen will display your current W-4 federal tax withholding selections. Select Update if you wish to make changes.

W-4 Tax Exemptions/Allowances	
 Your W-4 information determines the amount of Federal Tax that is withheld from your pay.	
<b>Federal Withholding Tax</b>	
As of Date:	Dec 10, 2019
Name:	[REDACTED]
Address:	[REDACTED]
Last Name differs from SSN card:	No
Deduction Status:	Active
Start Date:	Apr 24, 1990
End Date:	
Filing Status:	Married
Number of Allowances:	1
Additional Withholding Amount:	[REDACTED]
<b>Note:</b> Additional amount, if any, you want withheld from each paycheck.	
<input type="button" value="Print"/>	
<a href="#">History</a>   <a href="#">Update</a>   <a href="#">Cont</a>	

# Updating W-4 Information

If you are a non-resident (such as a J1 and F1 visa holder) you should not update the form W-4 using Employee Self-Service. Contact the Office of International Taxation at [dslough@richmond.edu](mailto:dslough@richmond.edu).

## Update W-4 Information



- Enter your desired changes and click the Submit Changes button. Please realize that by clicking the Submit Changes button, you are under penalty of perjury if the information submitted is not true and valid. Specific instructions for completing form W4 can be found at <http://www.irs.gov/pub/irs-pdf/fw4.pdf>
- If you are a non-resident alien (NRA), your status should only be updated by the Office of International Taxation; please contact that office at 287-6007 if you have any questions.

\* - indicates a required field.

### Federal Withholding Tax

Deduction Effective as of:

If your last name differs from that shown on your Social Security Card, check here.

Note: See Form W-4 instructions.

Effective Date of Change MM/DD/YYYY:\*

Note: Effective Date must be after Feb 29, 2020 the date you were last paid.

Deduction Status:\*

Active ▼

I claim exemption from withholding for the tax year specified, and I certify that I meet both of the following conditions for exemption.

\* Last year I had no tax liability and

\* This year I expect to have no tax liability.

If you meet both conditions, select "Exempt" in Deduction Status field.

**Deduction Effective as of** shows the current date and the information displays the current W-4 selections.

**Effective Date of change** will default to the current date. You may change the date to the first day of the current pay period.

**Deduction Status-** Select the drop down menu to see the choices of Active or Exempt. You should only select exempt if both of the conditions apply to you.

## Update W4 Information, cont.

<b>Filing Status:*</b>	<input type="text"/>
<b>NRA Indicator:</b>	<input type="checkbox"/>
<b>Step 2C Indicator:</b>	<input type="checkbox"/>
<b>Dependents under 17 999999.99 :</b>	<input type="text"/>
<b>Other Dependents 999999.99 :</b>	<input type="text"/>
<b>Dependent Amount 999999.99 :</b>	<input type="text"/>
<b>Other Income 999999.99 :</b>	<input type="text"/>
<b>Deductions 999999.99 :</b>	<input type="text"/>
<b>Additional Withholding Amount 999999.99 :</b>	<input type="text"/>

Refer to the IRS Form W-4 Steps as you complete this section

Multiply the number of qualifying children under age 17 by \$2,000.

Multiply the number of other dependents by \$500.

Step 3: Add the amounts above and enter the total here.

Step 4a) See Form W-4 instructions.

Step 4b) See Form W-4 instructions.

Step 4c) Extra Withholding. Enter any additional tax you want withheld each pay period.

If you completed Step 2 using Option A or B, you may have an amount as a result of those options to include as Additional Withholding.

\*If in step 2 of Form W-4 you selected the third option (option C), check this box.

\*From the drop down menu, select the appropriate filing status.  
\*Leave the NRA Indicator blank, it applies only to Non-resident Aliens.

Please read all of the instructions to the right of the remaining fields carefully as you finalize updating your W-4 information. Refer to IRS Form W-4 and its instructions for additional information.



You are almost done! All that is left is to certify your changes. Review your information carefully and then click on the “certify changes” box at the bottom of the page.

You will be prompted to respond to a penalties of perjury statement.

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.

A confirmation of the update is displayed.

### Tax Update Confirmation

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The updates you requested were successfully processed.

Tax updates are processed immediately but are subject to review by the Benefits Administrator or Payroll Office.

If you have questions about the instructions, please contact the Payroll Office; however, if you have questions about how you should complete the form, the Payroll Office cannot offer individual tax advice. For additional assistance, refer to the IRS sites below or consult a tax professional.

IRS FAQs <https://www.irs.gov/newsroom/faqs-on-the-2020-form-w-4>

IRS Tax Withholding Estimator <https://apps.irs.gov/app/tax-withholding-estimator>

The IRS telephone number is 1-800-829-1040, and they are available from 7 a.m. – 7 p.m. Monday thru Friday.