2020 W-4 Form

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How to Help Your Employees

While we are getting ready for this change there are a couple things you can do to make sure there is a smooth transition.

- Review the W-4 form and Tax Withholding Estimator.

Note If you use HRCenter™, are your workflows using the default form? If so, this change will be seamless for you. If not, you will need to create a ticket with support for a new, custom 2020 W-4.

How Does This Affect Our Products?

HRCenter

The TempWorks team has enabled the updated Federal W-4 form as of 1/1/2020 (with subsequent year updates as needed). As long as you have been utilizing the default W-4 form in one of your workflows, this has been flipped to use the updated version of the default W-4 form.

Note On the updated form featured below, to mark exempt, the applicant should write "Exempt" in the 4(c) field instead of a dollar amount. This will fill "99" to Federal Exemptions on the employee record.

Further instructions can be found within Page 2 of the W-4 form.

Beyond

For an existing employee:

All existing employees will default to a 2019 W4 Year processing status. If you flip the W4 Year to 2020 (or later), new fields will appear that are relevant to the 2020 (and subsequent years) W-4 form. We have outlined how each new field maps to the 2020 (or later) W-4 below.

For a new employee on or after 1/1/2020:

All new employees after 1/1/2020 will default to a 2020 (or later) W4 Year processing status. This will not be displayed anywhere in the UI. Below is what they will see, with no option of reverting back to 2019.

Basic Tax Setup

Marital Tax Status
Single   ▾   ☐ Tax at Higher Rate

Dependent Allowance   Other Income
0   ⊡   0

Extra Deductions   Extra Withholding
0   0

Federal Exemptions   State Exemptions
0   0

Tax State   State Juris
Minnesota   ▾   ▾

County Tax   ▾   ☐ Exempt

City Tax   ▾   ☐ Exempt

School Tax   ▾   ☐ Exempt

SAVE AS DRAFT   CANCEL   SUBMIT

Enterprise

For an existing employee:

All existing employees will default to a 2019 W4 Year processing status. If you flip the W4 Year to 2020 (or later), new fields will appear that are relevant to the 2020 (and subsequent years) W-4 form. We have outlined how each new field maps to the 2020 (or later) W-4 below.

general information

Pay Setup Complete ☒

Employee ID: 4294969502

required tax information

W4 Year	2020
Tax Higher Rate	☐ **Step 2 Check Box**
Marital Tax Status	Single ▾
Dependent Allowance	$0.00 **Step 3 Claim Dependents**
Dependents	4
Other Income	$0.00 **Step 4 (a) Other Income**
Extra Deductions	0.00 **Step 4 (b) Deductions**
Extra Withholding	$0.00 **Step 4 (c) Extra Withholding**
Federal Exemptions	0 **Only 0 or 99 (marked exempt)**
Tax State	MN ▾
State Exemptions	3
State Juris	▾
Tax By Employee State	☐
Qualifies for HIRE Act	☐

For a new employee on or after 1/1/2020:

When you quick add an employee, you will now be prompted for the "Tax Higher Rate", so the correct tax juris will be applied to the employee. You should check "Tax Higher Rate" only if the employee checked the 2(c) box on the 2020 (or later) W-4. On their Pay Setup screen, you will not see the W4 Year toggle because you cannot revert back to 2019.

Breakdown of the W-4 form

Step 1: Enter Personal Information

- This section of the form resembles the prior form.

Step 2: Multiple Jobs or Spouse Works

- Select this new box to be taxed at a higher rate for this job.

Step 3: Claim Dependents

- Use this to enter any child tax and/or dependent credits.

Step 4: Other Adjustments

- This step likely requires the employee to use the Tax Withholding Estimator made available in August of 2019.
- Step 4(b) informs employees that if the employee skips this line, withholding will be based on the standard deduction.
- Employees that are exempt from withholding can select the appropriate checkbox at the bottom of Step 4.

Step 4: 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.** Use the Deductions Worksheet on page 4 to determine the amount of deductions you may claim, which will reduce your withholding. (If you skip this line, your withholding will be based on the standard deduction.) Enter the result here . .	4(b) $
	(c) **Extra withholding.** Enter any additional tax you want withheld each **pay period** . .	4(c) $

| Exempt from withholding | I claim exemption from withholding for 2026, and I certify that I meet **both** of the conditions for exemption for 2026. See *Exemption from withholding* on page 2. I understand I will need to submit a new Form W-4 for 2027 . ☐ |

Step 5: Sign the form

- The last step is easy!

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**

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