

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.

Step 3:	If your income will be \$200,000 or less (\$400,000 or less if married filing jointly):		
Claim Dependents	Multiply the number of qualifying children under age 17 by \$2,000 ▶	\$ 4000	
	Multiply the number of other dependents by \$500 ▶	\$ 0	
	Add the amounts above and enter the total here	3	\$ 4000
Step 4 (optional):	(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)	\$ 0
Other Adjustments	(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)	\$ 0
	(c) Extra withholding. Enter any additional tax you want withheld each pay period	4(c)	\$ Exempt

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.

The screenshot shows the 'Basic Tax Setup' form with the 'W4 Year' dropdown menu set to 2019. The form includes fields for Federal Exemptions (0), State Exemptions (0), Federal Additional Withholding (0), Dependents (0), Marital Tax Status (Single), Tax State (Minnesota), State Juris, County Tax, City Tax, and School Tax, each with an 'Exempt' checkbox.

The screenshot shows the 'Basic Tax Setup' form with the 'W4 Year' dropdown menu set to 2020. The form includes fields for Marital Tax Status (Single), Tax at Higher Rate (checkbox), Dependent Allowance (0), Step 3 Claim Dependents, Other Income (0), Step 4(a) Other Income, Extra Deductions (0), Step 4(b) Deductions, Extra Withholding (0), Step 4(c) Extra Withholding, Federal Exemptions (0), Only 0 or 99 if marked Exempt, State Exemptions (0), Tax State (Minnesota), State Juris, County Tax, City Tax, and School Tax, each with an 'Exempt' checkbox.

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	<input type="checkbox"/> Tax at Higher Rate
Dependent Allowance 0	Other Income 0
Extra Deductions 0	Extra Withholding 0
Federal Exemptions 0	State Exemptions 0
Tax State Minnesota	State Juris
County Tax	<input type="checkbox"/> Exempt
City Tax	<input type="checkbox"/> Exempt
School Tax	<input type="checkbox"/> Exempt

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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.

The screenshot shows the 'pay setup' screen in the Enterprise system. The left sidebar contains a navigation menu with options: visifile, details, documents, integrations, evaluations, messages, pay history, pay setup (selected), accruals, adjustments, arrears, electronic pay, imputed income, rate sheet, and taxes. The main content area is titled 'general information' and includes a 'Pay Setup Complete' checkbox and an 'Employee ID' field. Below this is the 'required tax information' section, which is highlighted with a red box. This section contains the following fields: 'W4 Year' (set to 2019), 'Federal Exemptions' (0), 'State Exemptions' (0), 'Federal Add. Withholding' (\$0.00), 'Dependents' (0), 'Marital Tax Status' (Single), 'Tax State' (MN), and 'State Juris'.

general information	
Pay Setup Complete	<input type="checkbox"/>
Employee ID	
required tax information	
W4 Year	2019
Federal Exemptions	0
State Exemptions	0
Federal Add. Withholding	\$0.00
Dependents	0
Marital Tax Status	Single
Tax State	MN
State Juris	

general information

Pay Setup Complete

Employee ID

required tax information

W4 Year

Tax Higher Rate **Step 2 Check Box**

Marital Tax Status

Dependent Allowance **Step 3 Claim Dependents**

Dependents

Other Income **Step 4 (a) Other Income**

Extra Deductions **Step 4 (b) Deductions**

Extra Withholding **Step 4 (c) Extra Withholding**

Federal Exemptions **Only 0 or 99 (marked exempt)**

Tax State

State Exemptions

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.

add new employee

personal information

SSN: _____

First Name: zzNewFederalW4

Last Name: zzNewFederalW4

Initial: _____

Phone: _____

Cell: _____

Email: _____

address information

Street: _____

Street 2: _____

City: _____

State: MN

Zip Code: _____

School District: _____

Country: United States of America

tax setup/other

Branch: High Tech NE

Federal Ex: 0

State Ex: 0

Marital Status: Single

Tax Higher Rate

avatar

Upload a custom avatar by dragging it into this box.

general information

Pay Setup Complete

Employee ID: 4294969502

payment options

Electronic Pay Setup Complete

Mail Check and/or Stub

Email Pay Stub

Paycard Requested

Paycheck Delivery Code: _____

Default Pay Rate: _____

Note to Payroll: _____

required tax information

W4 Year: 2020

Tax Higher Rate

Marital Tax Status: Single

Dependent Allowance: \$0.00

Dependents: 4

Other Income: \$0.00

Extra Deductions: 0.00

Extra Withholding: \$0.00

Federal Exemptions: 0

Tax State: MN

State Exemptions: 3

State Juris: _____

Tax By Employee State

Qualifies for HIRE Act

affordable care act

ACA Status: Full-Time

Hire Date: Set Hire Date

Last Eval: 7/8/2014

Insurance: _____

Admin Status: _____

Insurance Due: _____

Next Eval: _____

local taxes

Local taxes are automatically determined by the employee's zip code. Manual changes should not be necessary.

County Tax: _____ Exempt

City Tax: _____

School Tax: _____

Breakdown of the W-4 form

Step 1: Enter Personal Information

- This section of the form resembles the prior form.

Form W-4 Department of the Treasury Internal Revenue Service	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.		2020
Step 1: Enter Personal Information	(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 www.ssa.gov.
	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.)		

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

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

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 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.

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

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

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):		
	(a) Multiply the number of qualifying children under age 17 by \$2,200	3(a) \$	
	(b) Multiply the number of other dependents by \$500	3(b) \$	
	Add the amounts from Steps 3(a) and 3(b), plus the amount for other credits. Enter the total here	3	\$

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 <i>Exemption from withholding</i> on page 2. I understand I will need to submit a new Form W-4 for 2027 . . . <input type="checkbox"/>
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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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