

Any changes made to Federal Tax Withholding must use the new W-4 format, per the IRS. See below for brief explanation of what the fields mean.

The new W4 Form is based on a [5-step approach](#) that determines your tax withholdings based on the “Filing Status” you choose, and the dollar amounts you enter when completing steps 2 through 4 – which are optional. Allowances are no longer used since they were tied to the Personal Exemption which has been eliminated in the new tax law.

1. **Enter personal information and Filing Status (required)**
2. Account for multiple jobs (optional)
3. Claim dependents (optional)
4. Other adjustments (optional)
5. **Sign and Date / Certify Changes (required)**

Only filling out Steps 1 and 5 (minimum required) will result in tax withholding based on your standard deduction and tax rates with no other adjustments. Filling out steps 2 through 4 – which target your personal financial situation - will more accurately reflect your tax liability when data is entered in these steps according to the IRS. **Please note the Payroll department cannot give tax advice. Contact a professional tax preparer for consultation related to individual tax questions.**

When you open the new W4 in your myUT, you will see the following:

Update W4

Complete the required fields and select Submit Changes.

In order for your changes to be effective on the next pay check, you must submit them by the Tuesday of pay week. **Effective Date of Change** field is automatically pre-populated to occur on the next scheduled pay date. Future changes other than next pay date are also possible by changing the date in that field.

Note : Effective Date must be after last paid date, or after the latest date of any future changes you have submitted. Click on [history](#) to see all W-4 updates.

**If you are filing exempt status, you must complete the annually required form in the Payroll department on the Main Campus in University Hall.

⚠ The IRS released a new W-4 form for 2020. The filing status and additional withholding amount (if any) will default in to the new form fields, but number of allowances/exemptions are no longer used. If you would like to review that information you can access your [W-4 History](#).

★ - indicates a required field.

Federal Withholding Tax
Deduction Effective as of: Jan 04, 2020

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: 01/04/2020
Note: Effective Date must be after Jan 03, 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.

Filing Status: Single

NRA Indicator:

Step 2C Indicator:

Dependents under 17 999999.99 : Multiply the number of qualifying children under age 17 by \$2,000.

Other Dependents 999999.99 : Multiply the number of other dependents by \$500.

Dependent Amount 999999.99 : Step 3: Add the amounts above and enter the total here.

Other Income 999999.99 : Step 4a) See Form W-4 instructions.

Deductions 999999.99 : Step 4b) See Form W-4 instructions.

Additional Withholding 999999.99 : Step 4c) Extra Withholding. Enter any additional tax you want withheld each pay period.

- **If your Last Name differs from what’s on your Social Security Card** – check the box.
- **Effective Date:** will be pre-set based on your last paid date.
- **Deduction Status:** Active
- **(Step 1) Choose your filing status** – (Head of Household, Married, Married but use Single rate, or Single)
- **NRA Indicator:** check this box if you are “not” a US Citizen, but do not check it if you are on an H1B Visa.

For Steps 2-4 please refer to the IRS instructions and worksheet which can be found at: <https://www.irs.gov/pub/irs-pdf/fw4.pdf>

- **(Step 2) Step 2C Indicator:** check this box if you have multiple jobs that you wish to account for and refer to Page 3 Multiple Jobs Worksheet in the IRS Instructions link.
- **(Step 3) Dependents under 17:** enter the dollar amount based on the # of dependents you have under age 17 x \$2000
- **(Step 3) Other Dependents:** enter the dollar amount based on the # of dependents you have age 17 and over x \$500 – this can include children age 17 and over or other dependents over 17 that you claim.
- **(Step 3) Dependent Amount:** add steps 4 and 5 and enter the total amount here.
- **(Step 4) Other Income:** 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.
- **(Step 4) 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.
- **(Step 4) Additional Withholding:** Enter any additional tax you want withheld each pay period.
- **(Step 5) Certify Changes.**