



Introduction

This job aid provides the steps necessary to complete your Federal Form W-4 withholding so the Payroll Department can calculate the correct amount of taxes to withhold from your pay. Federal income tax is withheld from your wages based on the information on this form. You can file a new Form W-4 anytime your tax situation changes.

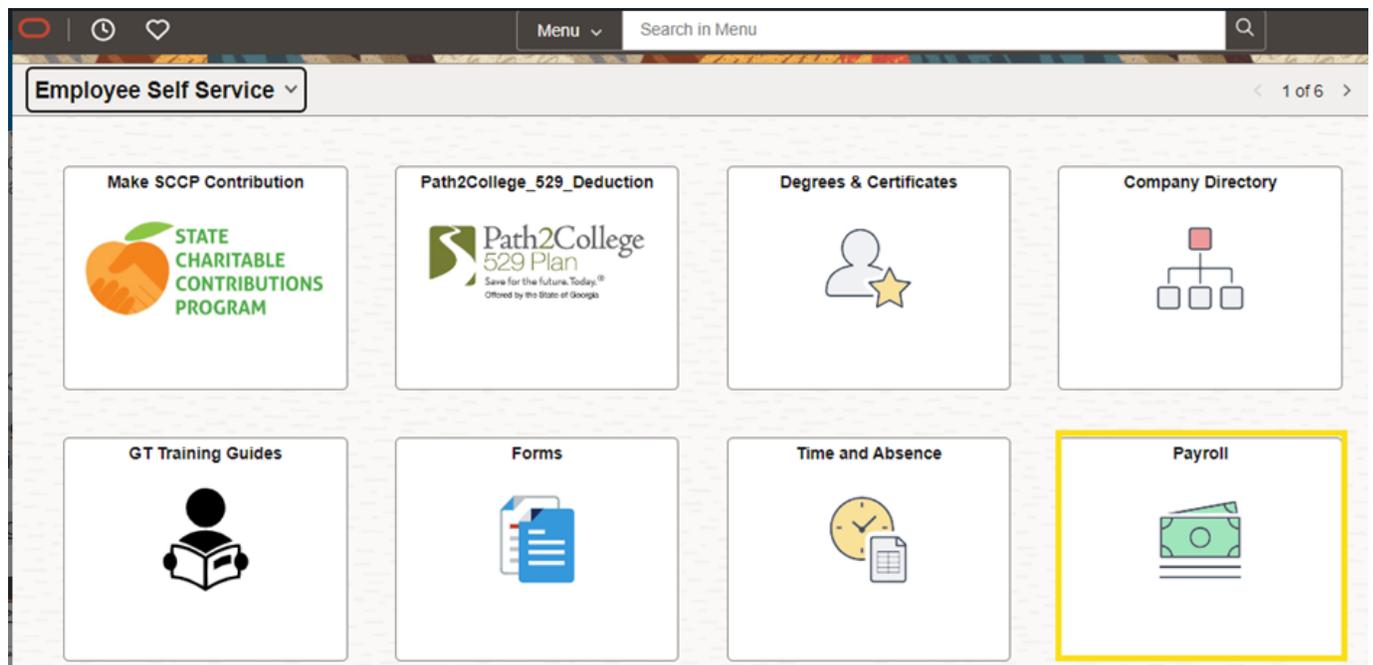
Whether you are entitled to claim a certain number of dependents or exemption from withholding is subject to review by the IRS. Your employer may be required to send a copy of this form to the IRS.

To ensure your tax information is correct, please review your paychecks periodically for accuracy. If you have questions or need assistance with determining if adjustments are needed on your W-4 form, please consult a tax professional.

Instructions

1. Log into **OneUSG Connect**.
2. Click the **Payroll** tile on the **Employee Self Service** homepage

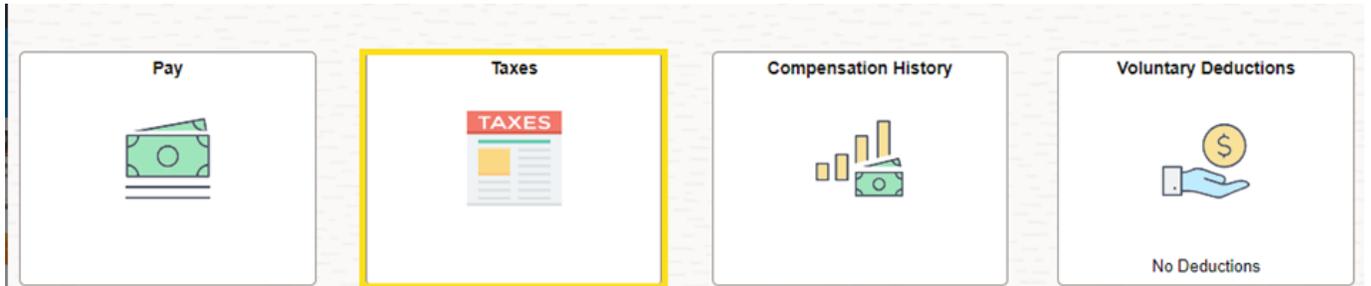
Navigation: Employee Self Service > Payroll > Taxes > W-4 Information



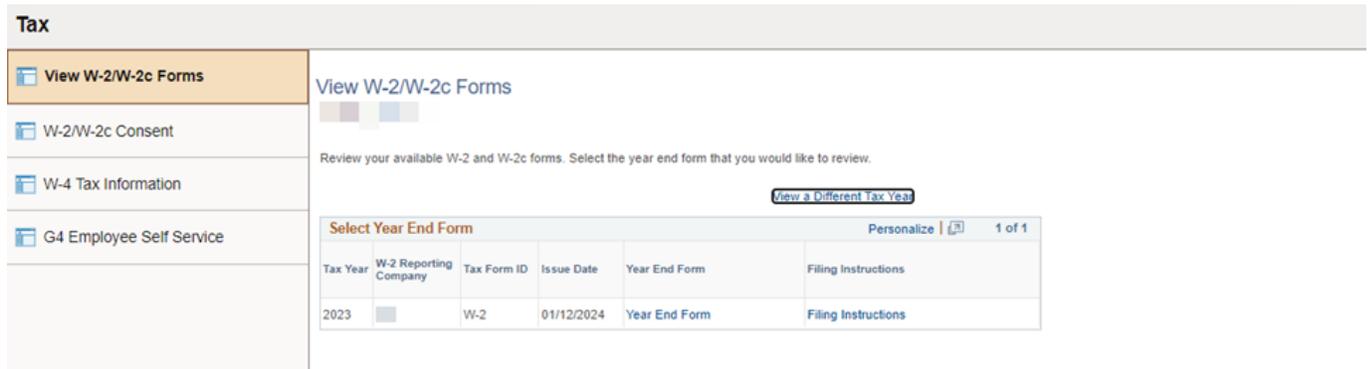
[Type here]



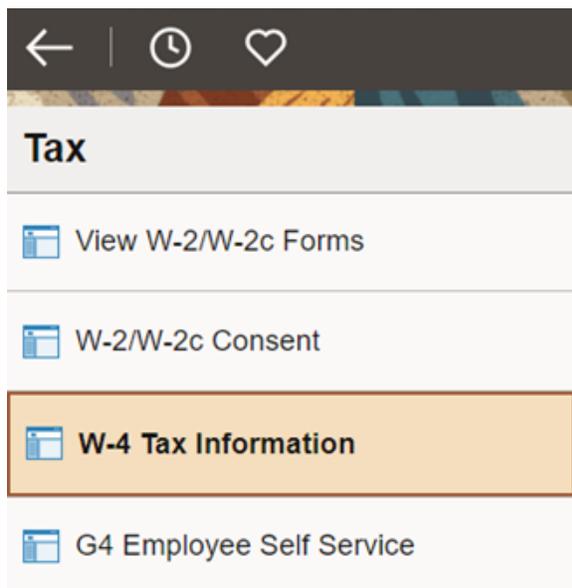
3. Select the **Taxes** tile



Note: The screen opens to the **W-2/W2-C** page.



4. Select **W-4 Tax Information**



[Type here]



5. Confirm your name matches the name on your social security card.

W-4 Withholding Certificate

Board of Regents (USG)



Board of Regents (USG)

For W4 associated with a different company, select a

Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Your withholding is subject to review by the IRS www.irs.gov.

Step 1: Personal Information

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.

6. Observe your address is partially masked for security purposes.

W-4 Withholding Certificate

Board of Regents (USG)

Board of Regents (USG)

For W4 associated with a different company, select a

Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Your withholding is subject to review by the IRS www.irs.gov.

Step 1: Personal Information

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.

Address

25*****ve

S*****81

7. Proceed to select the appropriate Filing Status: The options are "Single", "Married filing jointly or Qualifying Surviving Spouse", or "Head of Household".

[Type here]



Filing Status

- Single or Married filing separately
- Married filing jointly or Qualifying Surviving Spouse
- Head of Household (Check only if you are unmarried and pay more than half the cost of keeping up a home for yourself and a qualifying individual).

Complete Steps 2 through 4 ONLY if they apply to you. To see if you are exempt from withholding or you have concerns about your privacy, see instructions for Form W-4 on the IRS website.

Note: NRA (Non-Resident Aliens) marital status will default to 'Single' regardless of actual marital status.

8. If the **Multiple Jobs or Spouse Works** section on Step 2 of the form applies to you, select the checkbox if you hold more than one job at a time or are married filing jointly and your spouse also works.

Step 2: Multiple Jobs or Spouse Works

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 these jobs.

[Hide Instructions](#)

Do **only one** of the following.

- (a) Use the estimator at www.irs.gov/W4App for most accurate withholding; **or**
- (b) Use the Multiple Jobs Worksheet 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.

CAUTION: If you have privacy concerns, choose (a) or (b). If you and/or your spouse have income from self-employment, including as an independent contractor, choose (a).

Multiple Jobs or Spouse Works

Complete Steps 3 through 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 through 4(b) on the Form W-4 for the highest paying job.)

9. If claiming dependents, complete Claim Dependents section on Step 3 of the form.

Step 3: Claim Dependents

[Hide Instructions](#)

To qualify for the child tax credit, the child must be under age 17 as of December 31, must be your dependent who generally lives with you for more than half the year, and must have the required social security number. You may be able to claim a credit for other dependents for whom a child tax credit can't be claimed, such as an older child or a qualifying relative. For additional eligibility requirements for these credits, see Pub. 972, Child Tax Credit and Credit for Other Dependents. You can also include other tax credits in this step, such as education tax credits and the foreign tax credit. To do so, add an estimate of the amount for the year to your credits for dependents and enter the total amount in Step 3. Including these credits will increase your paycheck and reduce the amount of any refund you may receive when you file your tax return.

If your income will be \$200,000 or less (\$400,000 or less if married filing jointly):

Multiply the number of qualifying children under age 17 by \$2,000	<input type="text"/>
Multiply the number of other dependents by \$500	<input type="text"/>
Other tax credits	<input type="text"/>
Total	2000.00

[Type here]



10. If you have other adjustments, complete **Other Adjustments** section on Step 4 of the form.

Step 4: Other Adjustments

 Hide Instructions

(a) 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. You should not include income from any jobs.

(b) Deductions. If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use the Deductions Worksheet and enter the result here.

(c) Extra withholding. Enter any additional tax you want withheld each pay period.

(a) Other Income

(b) Deductions

(c) Extra Withholding

11. If the **Claim Exemption from Withholding** section applies to you, complete this section of the form.

- Enter the appropriate year in which you are claiming the exemption.
- Read the eligibility requirements and Check this box if you meet both conditions to claim exempt status.
- Read the acknowledgement statement and click the Submit button.

Claim Exemption from Withholding

I claim exemption from withholding for the year and I certify that I meet

BOTH of the following conditions for exemption from withholding:

- Last year I owed no federal income tax.
- This year I expect to owe no federal income tax.

Check this box if you meet both conditions to claim exemption from tax withholding

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.

Submit