Helpful Tips for Administrators on Form W-4 (2020)

Please use this document to aid in your understanding of Form W-4 (2020). This document is to be used in conjunction with the Form W-4 instructions, Internal Revenue Service (IRS) FAQ, and Form W-4 worksheets.

1. Please anticipate that new employees will need more time to complete the new Form W-4. Employees may need to take the form home, and return it later when they’ve had time to complete it.

2. All new hires are required to complete the new Form W-4 along with the WI Form WT-4, if applicable.

3. Existing employees are not required to file a new Form W-4, but it is highly recommended.

4. Administrators will be able to start entering these new forms 12/13/2019 in Update Employee Tax Data. No entry can be done prior to 12/13/2019 using a 1/1/2020 effective date on the tax data page.

5. The UW custom W-4 page is now referred to as the W-4 Supplemental Tax Form and is available: https://uwservice.wisconsin.edu/docs/forms/tax-w4-supplemental.pdf

6. It is recommended that administrators complete the tax withholding estimator and Form W-4 for a better understanding. There are links on the Payroll Administrative page to these documents: https://uwservice.wisconsin.edu/administration/payroll/

7. On the new Form W-4, only sections 1 & 5 are required, other sections are optional. The form is invalid if steps 1 & 5 are not completed.

8. If a NEW employee is hired and does not complete the new Form W-4, they will be taxed as a single filer with NO other income adjustments.

9. If employees ask for help completing this form, please direct them to the IRS Form W-4 instructions, the FAQ, and/or the worksheets to help them complete the Form W-4.

10. Please note when using the worksheets and the IRS tax estimator, the wage amounts to be used are pre-tax wages not gross wages (i.e. taxable wages).

11. In reference to step 2 on the Form W-4, employees should select only ONE of the three options: use tax estimator/calculator, complete worksheet on Form W-4, or check the multiple job checkbox. Please note: The IRS Tax Estimator will not be updated until early January with the new tax rates. Also, the HRS paycheck modeler will not be updated with the 2020 tax rates until January 2020.

12. All employees who filed exempt in 2019 and plan to renew their exemption for 2020, will need to fill out a new Form W-4 to receive their exempt status in 2020. A reminder will be sent to these employees in early December.

13. Documents translated to different languages will be available when the IRS releases them.

14. Specific International instructions (IRS Publication 1392) for Nonresident Aliens has not been updated by the IRS as of yet.