New Form W-4 Employee’s Withholding Certificate

The 2020 Form W-4, Employee's Withholding Certificate, is significantly different from previous versions due to the federal 2017 Tax Cuts and Jobs Act changes, primarily the elimination of withholding allowances.

Any individual completing a Form W-4, Employee’s Withholding Certificate, to be effective January 1, 2020 or later must use the new form. This includes:

- All new employees starting employment January 1, 2020 or later
- All current employees wanting to change their W-4 Withholding to be effective January 1, 2020 or later. Current employees do NOT need to complete the new form unless they choose to make a change to their withholding.

Employees completing the new form are advised to read the W-4 Employee’s Withholding Certificate instructions to avoid over or under tax withholding. Steps 1 and 5 on the form are required. Steps 2, 3, and 4 are optional, but completing them will help ensure your federal income tax withholding will more accurately match your tax liability. Step 1 is for your personal information; Step 2 is for households with multiple jobs; Step 3 is used to claim tax credits for dependents; Step 4 is for other adjustments (additional income such as interest and dividends, itemized deductions exceeding the standard deduction, and extra tax you want withheld); and Step 5 is to sign the form.

The IRS has published Frequently Asked Questions you may find helpful in completing the form.

Questions? – Contact Sherri Schmitz x32656 or Linda Gruetzmacher x33003 or email Payroll@uni.edu