

## **Employment Eligibility Verification**

### **Department of Homeland Security**

U.S. Citizenship and Immigration Services

USCIS Form I-9

OMB No. 1615-0047 Expires 10/31/2022

▶ START HERE: Read instructions carefully before completing this form. The instructions must be available, either in paper or electronically, during completion of this form. Employers are liable for errors in the completion of this form.

**ANTI-DISCRIMINATION NOTICE:** It is illegal to discriminate against work-authorized individuals. Employers **CANNOT** specify which document(s) an employee may present to establish employment authorization and identity. The refusal to hire or continue to employ an individual because the documentation presented has a future expiration date may also constitute illegal discrimination.

than the first day of employment, but not before accepting a job offer.)  Last Name (Family Name) First Name (Given Name) Middle Initial Other Last Names Used (if any)  Address (Street Number and Name) Apt. Number City or Town State ZIP Code  Date of Birth (mm/dd/yyyy) U.S. Social Security Number Employee's E-mail Address Employee's Telephone Number I am aware that federal law provides for imprisonment and/or fines for false statements or use of false documents in connection with the completion of this form.  I attest, under penalty of perjury, that I am (check one of the following boxes):	er
Date of Birth (mm/dd/yyyy)  U.S. Social Security Number  Employee's E-mail Address  Employee's Telephone Number  I am aware that federal law provides for imprisonment and/or fines for false statements or use of false documents in connection with the completion of this form.	ver
I am aware that federal law provides for imprisonment and/or fines for false statements or use of false documents in connection with the completion of this form.	per
connection with the completion of this form.	
i attest, under penalty of perjury, that i am (check one of the following boxes):	
1. A citizen of the United States	
2. A noncitizen national of the United States (See instructions)	
3. A lawful permanent resident (Alien Registration Number/USCIS Number):	
4. An alien authorized to work until (expiration date, if applicable, mm/dd/yyyy):	
Some aliens may write "N/A" in the expiration date field. (See instructions)  OR Code - Section 1	
Aliens authorized to work must provide only one of the following document numbers to complete Form I-9:  An Alien Registration Number/USCIS Number OR Form I-94 Admission Number OR Foreign Passport Number.  Do Not Write In This Space	
1. Alien Registration Number/USCIS Number:  OR	
2. Form I-94 Admission Number:  OR	
3. Foreign Passport Number:	
Country of Issuance:	
Signature of Employee Today's Date (mm/dd/yyyy)	
Today 3 Date (minifully)	
Preparer and/or Translator Certification (check one):  I did not use a preparer or translator.  A preparer(s) and/or translator(s) assisted the employee in completing Section 1.  (Fields below must be completed and signed when preparers and/or translators assist an employee in completing Section 1.)	
I attest, under penalty of perjury, that I have assisted in the completion of Section 1 of this form and that to the best of r knowledge the information is true and correct.	ny
Signature of Preparer or Translator  Today's Date (mm/dd/yyyy)	
Last Name (Family Name) First Name (Given Name)	
Address (Street Number and Name)  City or Town  State  ZIP Code	

ST0F

Employer Completes Next Page

STOP

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# **Employment Eligibility Verification Department of Homeland Security**

U.S. Citizenship and Immigration Services

**USCIS** Form I-9

OMB No. 1615-0047 Expires 10/31/2022

# Section 2. Employer or Authorized Representative Review and Verification

(Employers or their authorized representative must complete and sign Section 2 within 3 business days of the employee's first day of employment. You

must physically examine one docu of Acceptable Documents.")	ment from List	A OR	a combin	ation of one	document t	from List	B and	one docum	nent from Li	ist C as listed on the "Lists	
Employee Info from Section 1	Last Name (I	Family	Name)		First Name	e (Given	Name)	) M.	I. Citizer	ship/Immigration Status	
List A Identity and Employment Aut		OR	List B AND Identity				D	Emple	List C byment Authorization		
Document Title		Do	cument T		<b>,</b>			Document		,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	
Issuing Authority			uing Auth	ority				Issuing Authority			
Document Number		Do	cument N	lumber				Document	Number		
Expiration Date (if any) (mm/dd/yy	уу)	Exp	piration D	ate (if any) (	mm/dd/yyy	y)		Expiration	Date (if an	y) (mm/dd/yyyy)	
Document Title											
Issuing Authority		A	dditiona	Informatio	n					Code - Sections 2 & 3 of Write In This Space	
Document Number											
Expiration Date (if any) (mm/dd/yy	уу)										
Document Title											
Issuing Authority											
Document Number											
Expiration Date (if any) (mm/dd/yy	уу)										
Certification: I attest, under po (2) the above-listed document( employee is authorized to wor	s) appear to	be ge	nuine ar								
The employee's first day of e	employment	(mm/	/dd/yyyy	<i>(</i> ):		(Se	ee ins	structions	for exen	nptions)	
Signature of Employer or Authorize	ed Representa	tive		Today's Da	te ( <i>mm/dd/</i> y	yyy)	Title of Employer or Authorized Representative				
Last Name of Employer or Authorized	Representative	Firs	t Name of	Employer or i	Authorized R	epresenta	itive	Employer'	s Business	or Organization Name	
Employer's Business or Organizati	on Address (S	Street N	lumber a	nd Name)	City or To	wn			State	ZIP Code	
Section 3. Reverification	and Rehire	es (To	be com	pleted and	signed by	employ	er or	authorized	d represer	ntative.)	
A. New Name (if applicable)							В	3. Date of R	Rehire <i>(if ap</i>	plicable)	
Last Name (Family Name)	First	t Name	e (Given I	lame)	Mic	ldle Initia	ıl	Date (mm/d	ld/yyyy)		
C. If the employee's previous grant continuing employment authorization					provide the	informat	tion for	r the docum	nent or rece	eipt that establishes	
Document Title				Docume	ent Number			E	Expiration D	ate (if any) (mm/dd/yyyy)	
I attest, under penalty of perjuithe employee presented docur											
Signature of Employer or Authorize	ed Representa	itive	Today's	Date (mm/c	ld/yyyy)	Name o	of Emp	loyer or Au	thorized Re	epresentative	

# LISTS OF ACCEPTABLE DOCUMENTS All documents must be UNEXPIRED

Employees may present one selection from List A or a combination of one selection from List B and one selection from List C.

	LIST A  Documents that Establish  Both Identity and  Employment Authorization	OR	LIST B Documents that Establish Identity	ID	LIST C Documents that Establish Employment Authorization	
2.	U.S. Passport or U.S. Passport Card  Permanent Resident Card or Alien Registration Receipt Card (Form I-551)  Foreign passport that contains a temporary I-551 stamp or temporary		1. Driver's license or ID card issued by a State or outlying possession of the United States provided it contains a photograph or information such as name, date of birth, gender, height, eye color, and address	1.	A Social Security Account Number card, unless the card includes one of the following restrictions:  (1) NOT VALID FOR EMPLOYMENT  (2) VALID FOR WORK ONLY WITH INS AUTHORIZATION	
4.	I-551 printed notation on a machine- readable immigrant visa  Employment Authorization Document that contains a photograph (Form I-766)		2. ID card issued by federal, state or local government agencies or entities, provided it contains a photograph or information such as name, date of birth, gender, height, eye color, and address	2.	(3) VALID FOR WORK ONLY WITH DHS AUTHORIZATION  Certification of report of birth issued by the Department of State (Forms DS-1350, FS-545, FS-240)	
5.	For a nonimmigrant alien authorized to work for a specific employer because of his or her status:  a. Foreign passport; and b. Form I-94 or Form I-94A that has		<ol> <li>School ID card with a photograph</li> <li>Voter's registration card</li> <li>U.S. Military card or draft record</li> <li>Military dependent's ID card</li> </ol>	3.	Original or certified copy of birth certificate issued by a State, county, municipal authority, or territory of the United States bearing an official seal	
	the following: (1) The same name as the passport; and	-	U.S. Coast Guard Merchant Mariner Card     Native American tribal document		5.	Native American tribal document  U.S. Citizen ID Card (Form I-197)  Identification Card for Use of
	(2) An endorsement of the alien's nonimmigrant status as long as that period of endorsement has not yet expired and the proposed employment is not in conflict with any restrictions or		Driver's license issued by a Canadian government authority  For persons under age 18 who are unable to present a document		Resident Citizen in the United States (Form I-179)  Employment authorization document issued by the	
6.	Passport from the Federated States of Micronesia (FSM) or the Republic of the Marshall Islands (RMI) with Form I-94 or Form I-94A indicating nonimmigrant admission under the Compact of Free Association Between the United States and the FSM or RMI	-	10. School record or report card  11. Clinic, doctor, or hospital record  12. Day-care or nursery school record		Department of Homeland Security	

Examples of many of these documents appear in the Handbook for Employers (M-274).

Refer to the instructions for more information about acceptable receipts.

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**Employee's Withholding Certificate** 

► 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.

OMB No. 1545-0074

nternal Revenue Ser	vice	► Your withholdi	ng is subject to review by the I	RS.	- 1				
Step 1:	(a)	First name and middle initial	Last name		(b) So	ocial security number			
Enter Personal Information	Addı		Does your name match the name on your social securit card? If not, to ensure you ge						
	City	or town, state, and ZIP code			credit for your earnings, conta SSA at 800-772-1213 or go www.ssa.gov.				
	(c)	Single or Married filing separately							
		Married filing jointly (or Qualifying widow(er))							
		Head of household (Check only if you're unman	ried and pay more than half the costs	of keeping up a home for yo	urself ar	nd a qualifying individual	l.)		
•	•	-4 ONLY if they apply to you; otherwis om withholding, when to use the online e		2 for more information	n on e	each step, who ca	n		
Step 2: Multiple Jobs	i	Complete this step if you (1) hold mo also works. The correct amount of with					е		
or Spouse		Do only one of the following.							
Works		(a) Use the estimator at www.irs.gov/	W4App for most accurate wit	thholding for this step	(and	Steps 3-4); <b>or</b>			
		(b) Use the Multiple Jobs Worksheet on	page 3 and enter the result in S	tep 4(c) below for rough	nly acc	curate withholding; o	r		
		(c) If there are only two jobs total, you is accurate for jobs with similar pay	may check this box. Do the s	ame on Form W-4 for	the ot	ther job. This option			
		TIP: To be accurate, submit a 2020 lincome, including as an independent			e) hav	e self-employmen	ıt		
Step 3:	ate i	f you complete Steps 3-4(b) on the Form  If your income will be \$200,000 or less		,			_		
Claim Dependents		Multiply the number of qualifying ch	ildren under age 17 by \$2,000	<b>▶</b> <u>\$</u>	-				
		Multiply the number of other depe	ndents by \$500	<b>▶</b> <u>\$</u>	-				
		Add the amounts above and enter the	total here		3	\$			
Step 4 (optional): Other		(a) Other income (not from jobs). If y this year that won't have withholdin include interest, dividends, and retir	g, enter the amount of other i	ncome here. This may		) \$			
Adjustments	;	(b) Deductions. If you expect to clain and want to reduce your withholdi							
		enter the result here			4(b)	) \$	_		
		(c) Extra withholding. Enter any addi	tional tax you want withheld	each <b>pay period</b> .	4(c)	)  \$	-		
Step 5:	Und	er penalties of perjury, I declare that this certi	ficate, to the best of my knowled	lge and belief, is true, co	orrect, a	and complete.	_		
Sign Here	<b>)</b> =						_		
	/ E	imployee's signature (This form is not v	alid unless you sign it.)	<sup>7</sup> Da	ate				
Employers	Emp	oloyer's name and address			Employ number	er identification r (EIN)			

Only

Form W-4 (2020) Page **2** 

#### **General Instructions**

## **Future Developments**

For the latest information about developments related to Form W-4, such as legislation enacted after it was published, go to www.irs.gov/FormW4.

## **Purpose of Form**

Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. If too little is withheld, you will generally owe tax when you file your tax return and may owe a penalty. If too much is withheld, you will generally be due a refund. Complete a new Form W-4 when changes to your personal or financial situation would change the entries on the form. For more information on withholding and when you must furnish a new Form W-4, see Pub. 505.

Exemption from withholding. You may claim exemption from withholding for 2020 if you meet both of the following conditions: you had no federal income tax liability in 2019 and you expect to have no federal income tax liability in 2020. You had no federal income tax liability in 2019 if (1) your total tax on line 16 on your 2019 Form 1040 or 1040-SR is zero (or less than the sum of lines 18a, 18b, and 18c), or (2) you were not required to file a return because your income was below the filing threshold for your correct filing status. If you claim exemption, you will have no income tax withheld from your paycheck and may owe taxes and penalties when you file your 2020 tax return. To claim exemption from withholding, certify that you meet both of the conditions above by writing "Exempt" on Form W-4 in the space below Step 4(c). Then, complete Steps 1a, 1b, and 5. Do not complete any other steps. You will need to submit a new Form W-4 by February 16, 2021.

**Your privacy.** If you prefer to limit information provided in Steps 2 through 4, use the online estimator, which will also increase accuracy.

As an alternative to the estimator: if you have concerns with Step 2(c), you may choose Step 2(b); if you have concerns with Step 4(a), you may enter an additional amount you want withheld per pay period in Step 4(c). If this is the only job in your household, you may instead check the box in Step 2(c), which will increase your withholding and significantly reduce your paycheck (often by thousands of dollars over the year).

**When to use the estimator.** Consider using the estimator at *www.irs.gov/W4App* if you:

- 1. Expect to work only part of the year;
- 2. Have dividend or capital gain income, or are subject to additional taxes, such as the additional Medicare tax;
- 3. Have self-employment income (see below); or
- 4. Prefer the most accurate withholding for multiple job situations.

**Self-employment.** Generally, you will owe both income and self-employment taxes on any self-employment income you receive separate from the wages you receive as an employee. If you want to pay these taxes through withholding from your wages, use the estimator at www.irs.gov/W4App to figure the amount to have withheld.

**Nonresident alien.** If you're a nonresident alien, see Notice 1392, Supplemental Form W-4 Instructions for Nonresident Aliens, before completing this form.

## **Specific Instructions**

**Step 1(c).** Check your anticipated filing status. This will determine the standard deduction and tax rates used to compute your withholding.

**Step 2.** Use this step if you (1) have more than one job at the same time, or (2) are married filing jointly and you and your spouse both work.

Option (a) most accurately calculates the additional tax you need to have withheld, while option (b) does so with a little less accuracy.

If you (and your spouse) have a total of only two jobs, you may instead check the box in option (c). The box must also be checked on the Form W-4 for the other job. If the box is checked, the standard deduction and tax brackets will be cut in half for each job to calculate withholding. This option is roughly accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld, and this extra amount will be larger the greater the difference in pay is between the two jobs.



Multiple jobs. Complete Steps 3 through 4(b) on only one Form W-4. Withholding will be most accurate if you do this on the Form W-4 for the highest paying job.

Step 3. Step 3 of Form W-4 provides instructions for determining the amount of the child tax credit and the credit for other dependents that you may be able to claim when you file your tax return. 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.

#### Step 4 (optional).

Step 4(a). Enter in this step the total of your other estimated income for the year, if any. You shouldn't include income from any jobs or self-employment. If you complete Step 4(a), you likely won't have to make estimated tax payments for that income. If you prefer to pay estimated tax rather than having tax on other income withheld from your paycheck, see Form 1040-ES, Estimated Tax for Individuals.

**Step 4(b).** Enter in this step the amount from the Deductions Worksheet, line 5, if you expect to claim deductions other than the basic standard deduction on your 2020 tax return and want to reduce your withholding to account for these deductions. This includes both itemized deductions and other deductions such as for student loan interest and IRAs.

Step 4(c). Enter in this step any additional tax you want withheld from your pay each pay period, including any amounts from the Multiple Jobs Worksheet, line 4. Entering an amount here will reduce your paycheck and will either increase your refund or reduce any amount of tax that you owe.

Form W-4 (2020)

#### Step 2(b) – Multiple Jobs Worksheet (Keep for your records.)



If you choose the option in Step 2(b) on Form W-4, complete this worksheet (which calculates the total extra tax for all jobs) on **only ONE** Form W-4. Withholding will be most accurate if you complete the worksheet and enter the result on the Form W-4 for the highest paying job.

**Note:** If more than one job has annual wages of more than \$120,000 or there are more than three jobs, see Pub. 505 for additional tables; or, you can use the online withholding estimator at *www.irs.gov/W4App*.

1	<b>Two jobs.</b> If you have two jobs or you're married filing jointly and you and your spouse each have one job, find the amount from the appropriate table on page 4. Using the "Higher Paying Job" row and the "Lower Paying Job" column, find the value at the intersection of the two household salaries and enter that value on line 1. Then, <b>skip</b> to line 3	1	\$
2	<b>Three jobs.</b> If you and/or your spouse have three jobs at the same time, complete lines 2a, 2b, and 2c below. Otherwise, skip to line 3.		
	<b>a</b> Find the amount from the appropriate table on page 4 using the annual wages from the highest paying job in the "Higher Paying Job" row and the annual wages for your next highest paying job in the "Lower Paying Job" column. Find the value at the intersection of the two household salaries and enter that value on line 2a	<b>2</b> a	\$
	<b>b</b> Add the annual wages of the two highest paying jobs from line 2a together and use the total as the wages in the "Higher Paying Job" row and use the annual wages for your third job in the "Lower Paying Job" column to find the amount from the appropriate table on page 4 and enter this amount on line 2b	2b	\$
		20	Ψ
	c Add the amounts from lines 2a and 2b and enter the result on line 2c	2c	\$
3	Enter the number of pay periods per year for the highest paying job. For example, if that job pays weekly, enter 52; if it pays every other week, enter 26; if it pays monthly, enter 12, etc	3	
4	<b>Divide</b> the annual amount on line 1 or line 2c by the number of pay periods on line 3. Enter this amount here and in <b>Step 4(c)</b> of Form W-4 for the highest paying job (along with any other additional amount you want withheld)	4	\$
	Step 4(b) – Deductions Worksheet (Keep for your records.)		
1	Enter an estimate of your 2020 itemized deductions (from Schedule A (Form 1040 or 1040-SR)). Such deductions may include qualifying home mortgage interest, charitable contributions, state and local taxes (up to \$10,000), and medical expenses in excess of 10% of your income	1	\$
2	Enter:   • \$24,800 if you're married filing jointly or qualifying widow(er) • \$18,650 if you're head of household • \$12,400 if you're single or married filing separately	2	\$
3	If line 1 is greater than line 2, subtract line 2 from line 1. If line 2 is greater than line 1, enter "-0-"	3	\$
4	Enter an estimate of your student loan interest, deductible IRA contributions, and certain other		
7	adjustments (from Schedule 1 (Form 1040 or 1040-SR)). See Pub. 505 for more information	4	\$
5	Add lines 3 and 4. Enter the result here and in Step 4(b) of Form W-4	5	\$

Privacy Act and Paperwork Reduction Act Notice. We ask for the information on this form to carry out the Internal Revenue laws of the United States. Internal Revenue Code sections 3402(f)(2) and 6109 and their regulations require you to provide this information; your employer uses it to determine your federal income tax withholding. Failure to provide a properly completed form will result in your being treated as a single person with no other entries on the form; providing fraudulent information may subject you to penalties. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation; to cities, states, the District of Columbia, and U.S. commonwealths and possessions for use in administering their tax laws; and to the Department of Health and Human Services for use in the National Directory of New Hires. We may also disclose this information to other countries under a tax treaty, to federal and state agencies to enforce federal nontax criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism.

You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. Generally, tax returns and return information are confidential, as required by Code section 6103.

The average time and expenses required to complete and file this form will vary depending on individual circumstances. For estimated averages, see the instructions for your income tax return.

If you have suggestions for making this form simpler, we would be happy to hear from you. See the instructions for your income tax return.

Form W-4 (2020) Page **4** 

Married Filing Jointly or Qualifying Widow(er)												
Higher Paying Job			IVIAITI					Wage & S	Salary			
Annual Taxable Wage & Salary	\$0 - 9,999	\$10,000 - 19,999	\$20,000 - 29,999	\$30,000 - 39,999	\$40,000 - 49,999	\$50,000 - 59,999	\$60,000 - 69,999	\$70,000 - 79,999	\$80,000 - 89,999	\$90,000 - 99,999	\$100,000 - 109,999	\$110,000 - 120,000
\$0 - 9,999	\$0	\$220	\$850	\$900	\$1,020	\$1,020	\$1,020	\$1,020	\$1,020	\$1,210	\$1,870	\$1,870
\$10,000 - 19,999	220	1,220	1,900	2,100	2,220	2,220	2,220	2,220	2,410	3,410	4,070	4,070
\$20,000 - 29,999	850	1,900	2,730	2,930	3,050	3,050	3,050	3,240	4,240	5,240	5,900	5,900
\$30,000 - 39,999	900	2,100	2,930	3,130	3,250	3,250	3,440	4,440	5,440	6,440	7,100	7,100
\$40,000 - 49,999	1,020	2,220	3,050	3,250	3,370	3,570	4,570	5,570	6,570	7,570	8,220	8,220
\$50,000 - 59,999	1,020	2,220	3,050	3,250	3,570	4,570	5,570	6,570	7,570	8,570	9,220	9,220
\$60,000 - 69,999	1,020	2,220	3,050	3,440	4,570	5,570	6,570	7,570	8,570	9,570	10,220	10,220
\$70,000 - 79,999	1,020	2,220	3,240	4,440	5,570	6,570	7,570	8,570	9,570	10,570	11,220	11,240
\$80,000 - 99,999	1,060	3,260	5,090	6,290	7,420	8,420	9,420	10,420	11,420	12,420	13,260	13,460
\$100,000 - 149,999	1,870	4,070	5,900	7,100	8,220	9,320	10,520	11,720	12,920	14,120	14,980	15,180
\$150,000 - 239,999	2,040	4,440	6,470	7,870	9,190	10,390	11,590	12,790	13,990	15,190	16,050	16,250
\$240,000 - 259,999	2,040	4,440	6,470	7,870	9,190	10,390	11,590	12,790	13,990	15,520	17,170	18,170
\$260,000 - 279,999	2,040	4,440	6,470	7,870	9,190	10,390	11,590	13,120	15,120	17,120	18,770	19,770
\$280,000 - 299,999	2,040	4,440	6,470	7,870	9,190	10,720	12,720	14,720	16,720	18,720	20,370	21,370
\$300,000 - 319,999 \$320,000 - 364,999	2,040	4,440	6,470	8,200	10,320 13,070	12,320	14,320	16,320	18,320	20,320	21,970	22,970
\$365,000 - 524,999	2,720 2,970	5,920 6,470	8,750 9,600	10,950 12,100	14,530	15,070 16,830	17,070 19,130	19,070 21,430	21,290 23,730	26,030	25,540 27,980	26,840 29,280
\$525,000 and over	3,140	6,840	10,170	12,100	15,500	18,000	20,500	23,000	25,730	28,000	30,150	31,650
ψ323,000 and over	3,140	0,040		Single o					25,500	20,000	30,130	31,000
Higher Paying Job								Wage & S	Salary			
Annual Taxable	\$0 -	\$10,000 -	\$20,000 -	\$30,000 -	\$40,000 -	\$50,000 -	\$60,000 -	\$70,000 -	\$80,000 -	\$90,000 -	\$100,000 -	\$110,000 -
Wage & Salary	9,999	19,999	29,999	39,999	49,999	59,999	69,999	79,999	89,999	99,999	109,999	120,000
\$0 - 9,999	\$460	\$940	\$1,020	\$1,020	\$1,470	\$1,870	\$1,870	\$1,870	\$1,870	\$2,040	\$2,040	\$2,040
\$10,000 - 19,999	940	1,530	1,610	2,060	3,060	3,460	3,460	3,460	3,640	3,830	3,830	3,830
\$20,000 - 29,999	1,020	1,610	2,130	3,130	4,130	4,540	4,540	4,720	4,920	5,110	5,110	5,110
\$30,000 - 39,999	1,020	2,060	3,130	4,130	5,130	5,540	5,720	5,920	6,120	6,310	6,310	6,310
\$40,000 - 59,999	1,870	3,460	4,540	5,540	6,690	7,290	7,490	7,690	7,890	8,080	8,080	8,080
\$60,000 - 79,999	1,870	3,460	4,690	5,890	7,090	7,690	7,890	8,090	8,290	8,480	9,260	10,060
\$80,000 - 99,999	2,020	3,810	5,090	6,290	7,490	8,090	8,290	8,490	9,470	10,460	11,260	12,060
\$100,000 - 124,999	2,040	3,830	5,110	6,310	7,510	8,430	9,430	10,430	11,430	12,420	13,520	14,620
\$125,000 - 149,999	2,040	3,830	5,110	7,030	9,030	10,430	11,430	12,580	13,880	15,170	16,270	17,370
\$150,000 - 174,999	2,360	4,950	7,030	9,030	11,030	12,730	14,030	15,330	16,630	17,920	19,020	20,120
\$175,000 - 199,999	2,720	5,310	7,540	9,840	12,140	13,840	15,140	16,440	17,740	19,030	20,130	21,230
\$200,000 - 249,999	2,970	5,860	8,240	10,540	12,840	14,540	15,840	17,140	18,440	19,730	20,830	21,930
\$250,000 - 399,999 \$400,000 - 449,999	2,970 2,970	5,860 5,860	8,240 8,240	10,540 10,540	12,840 12,840	14,540 14,540	15,840 15,840	17,140 17,140	18,440 18,450	19,730 19,940	20,830	21,930
\$450,000 - 449,999 \$450,000 and over	3,140	6,230	8,810	11,310	13,810	15,710	17,210	18,710	20,210	21,700	21,240 23,000	22,540 24,300
ψ430,000 and 0ver	3,140	0,230	0,010			Househo		10,710	20,210	21,700	23,000	24,300
Higher Paying Job								Wage & S	Salary			
Annual Taxable	\$0 -	\$10,000 -	\$20,000 -	\$30,000 -	\$40,000 -	\$50,000 -	\$60,000 -	\$70,000 -	\$80,000 -	\$90,000 -	\$100,000 -	\$110,000 -
Wage & Salary	9,999	19,999	29,999	39,999	49,999	59,999	69,999	79,999	89,999	99,999	109,999	120,000
\$0 - 9,999	\$0	\$830	\$930	\$1,020	\$1,020	\$1,020	\$1,480	\$1,870	\$1,870	\$1,930	\$2,040	\$2,040
\$10,000 - 19,999	830	1,920	2,130	2,220	2,220	2,680	3,680	4,070	4,130	4,330	4,440	4,440
\$20,000 - 29,999	930	2,130	2,350	2,430	2,900	3,900	4,900	5,340	5,540	5,740	5,850	5,850
\$30,000 - 39,999	1,020	2,220	2,430	2,980	3,980	4,980	6,040	6,630	6,830	7,030	7,140	7,140
\$40,000 - 59,999 \$60,000 - 79,999	1,020 1,870	2,530 4,070	3,750 5,310	4,830 6,600	5,860 7,800	7,060 9,000	8,260 10,200	8,850 10,780	9,050 10,980	9,250 11,180	9,360	9,360
\$80,000 - 79,999	1,900	4,070	5,310	7,000	8,200	9,000	10,200	11,180	11,670	12,670	11,580 13,580	12,380 14,380
\$100,000 - 124,999	2,040	4,300	5,850	7,000	8,340	9,400	11,360	12,750	13,750	14,750	15,770	16,870
\$125,000 - 149,999	2,040	4,440	5,850	7,140	9,360	11,360	13,360	14,750	16,010	17,310	18,520	19,620
\$150,000 - 174,999	2,040	5,060	7,280	9,360	11,360	13,480	15,780	17,460	18,760	20,060	21,270	22,370
\$175,000 - 199,999	2,720	5,920	8,130	10,480	12,780	15,080	17,380	19,070	20,370	21,670	22,880	23,980
\$200,000 - 249,999	2,970	6,470	8,990	11,370	13,670	15,970	18,270	19,960	21,260	22,560	23,770	24,870
\$250,000 - 349,999	2,970	6,470	8,990	11,370	13,670	15,970	18,270	19,960	21,260	22,560	23,770	24,870
\$350,000 - 449,999	2,970	6,470	8,990	11,370	13,670	15,970	18,270	19,960	21,260	22,560	23,900	25,200
\$450,000 and over	3,140	6,840	9,560	12,140	14,640	17,140	19,640	21,530	23,030	24,530	25,940	27,240

## Employee's Wisconsin Withholding Exemption Certificate/New Hire Reporting

Employee's Section (Print clearly)

Employee's legal name (first name,	middle initial, last name)		Social security number	Single			
				Married			
Employee's address (number and s	treet)		Date of birth				
				Married, but withhold at higher Single rate.			
City	State	Zip code	Date of hire	Note: If married, but legally separated,			
				check the Single box.			
FIGURE YOUR TOTAL WITHE Complete Lines 1 through 3 1. (a) Exemption for yourself							
(b) Exemption for your spouse – enter 1							
(c) Exemption(s) for deper	ident(s) – you are entitled	to claim an exer	nption for each dependent				
(d) Total – add lines (a) thr	ough (c)						
2. Additional amount per pay p	period you want deducted	(if your employe	r agrees)				
3. I claim complete exemption	from withholding (see inst	ructions). Enter	"Exempt"				
				am entitled. If claiming complete exemption from no liability for Wisconsin income tax for this year.			
Signature			Date Signed	, <u> </u>			

#### **EMPLOYEE INSTRUCTIONS:**

#### WHO MUST COMPLETE:

Effective on or after January 1, 2020, every newly-hired employee is required to provide a completed Form WT-4 to each of his or her employers. Form WT-4 will be used by your employer to determine the amount of Wisconsin income tax to be withheld from your paychecks. If you have more than one employer, you should claim a smaller number or no exemptions on each Form WT-4 provided to employers other than your principal employer so that the total amount withheld will be closer to your actual income tax liability.

You must complete and provide your employer a new Form WT-4 within 10 days if the number of exemptions previously claimed DECREASES.

You may complete and provide to your employer a new form WT-4 at any time if the number of your exemptions INCREASES.

Your employer may also require you to complete this form to report your hiring to the Department of Workforce Development.

#### • UNDER WITHHOLDING:

If sufficient tax is not withheld from your wages, you may incur additional interest charges under the tax laws. In general, 90% of the net tax shown on your income tax return should be withheld.

#### · OVER WITHHOLDING:

If you are using Form WT-4 to claim the maximum number of exemptions to which you are entitled and your withholding exceeds your expected income tax liability, you may use Form WT-4A to minimize the over withholding.

WT-4 Instructions – Provide your information in the employee section.

#### LINE 1

(a)-(c) Number of exemptions – Do not claim more than the correct number of exemptions. If you expect to owe more income tax for the year than will be withheld if you claim every exemption to which you are entitled, you may increase your withholding by claiming a smaller number of exemptions on lines 1(a)-(c) or you may enter into an agreement with your employer to have additional amounts withheld (see instruction for line 2).

(c) Dependents – Those persons who qualify as your dependents for federal income tax purposes may also be claimed as dependents for Wisconsin purposes. The term "dependents" does not include you or your spouse. Indicate the number of dependents that you are claiming in the space provided.

#### · LINE 2

Additional withholding – If you have claimed "zero" exemptions on line 1, but still expect to have a balance due on your tax return for the year, you may wish to request your employer to withhold an additional amount of tax for each pay period. If your employer agrees to this additional withholding, enter the additional amount you want deducted from each of your paychecks on line 2.

#### LINE 3

Exemption from withholding – You may claim exemption from withholding of Wisconsin income tax if you had no liability for income tax for last year, and you expect to incur no liability for income tax for this year. You may not claim exemption if your return shows tax liability before the allowance of any credit for income tax withheld. If you are exempt, your employer will not withhold Wisconsin income tax from your wages.

You must revoke this exemption (1) within 10 days from the time you expect to incur income tax liability for the year or (2) on or before December 1 if you expect to incur Wisconsin income tax liabilities for the next year. If you want to stop or are required to revoke this exemption, you must complete and provide a new Form WT-4 to your employer showing the number of withholding exemptions you are entitled to claim. This certificate for exemption from withholding will expire on April 30 of next year unless a new Form WT-4 is completed and provided to your employer before that date.

#### **Employer's Section**

Employer's name				Federal Employer ID Number
Employer's payroll address (number and street)		City	State	Zip code
Completed by	Title	Phone number ( )	Email	

#### **EMPLOYER INSTRUCTIONS for Department of Revenue:**

- If you do not have a Federal Employer Identification Number (FEIN), contact the Internal Revenue Service to obtain a FEIN.
- If the Employee has claimed more than 10 exemptions OR has claimed complete exemption from withholding and earns more than \$200.00 a week or is believed to have claimed more exemptions than he or she is entitled to, mail a copy of this certificate to: Wisconsin Department of Revenue, Audit Bureau, PO Box 8906, Madison WI 53708 or fax (608) 267-0834.
- Keep a copy of this certificate with your records. If you have questions about the Department of Revenue requirements, call (608) 266-2772 or (608) 266-2776.

#### **EMPLOYER INSTRUCTIONS for New Hire Reporting:**

- This report contains the required information for reporting a New Hire to Wisconsin. If you are reporting new hires electronically, you do not need to forward a copy of this report to the Department of Workforce Development. Visit https://dwd.wi.gov/uinh/ to report new hires.
- If you do not report new hires electronically, mail the original form to the Department of Workforce Development, New Hire Reporting, PO Box 14431, Madison WI 53708-0431 or fax toll free to 1-800-277-8075.
- If you have questions about New Hire requirements, call toll free (888) 300-HIRE (888-300-4473). Visit dwd.wi.gov/uinh/ for more information.

# **Authorization for Direct Deposit of Payroll**

The University of Wisconsin System distributes pay to the direct deposit accounts you designate below or through the Focus Pay Card.

Select One:	Select One: Biweekly Payroll (Classified/LTE/Student/Unclassified Hourly appointments)  Effective Date: As Soon As Possible							
	Monthly Payroll (F	Faculty, Academic Staff, Teaching and Research Assistant appointments)	☐ Futi	ure Pay Date:				
Employee Info	ormation   You a	re highly encouraged to complete this form online, print, and sign it; or ple	ease print legibly to	prevent delays.				
,	Payroll Empl ID OR social Security Number (Last 4 Digits Only):							
_								
Primary Acco	unt   Required: `	Your paycheck or the balance is deposited in this account after the % or \$ amount	unt is deducted from	the accounts listed below.				
Select one:	Account Type (Select one):	ABA Transit Routing Number:						
 ☐ Change	☐ Checking	Account Number:		NET PAY				
☐ No Change	Savings	Name of Financial Institution:		(Balance)				
		Financial Institution City, State:						
Second Acco	unt   Optional: U	se to designate a percentage or dollar amount for an account other than t	he primary.	% OR \$ OF NET DISTRIBUTION				
Select one:	Account Type (Select one):	ABA Transit Routing Number:		%				
☐ Change	☐ Checking	Account Number:		<del></del>				
☐ Cancel	☐ Savings	Name of Financial Institution:		or \$				
☐ No Change		Financial Institution City, State:						
Third Accoun	t   Optional: Use	to designate a percentage or dollar amount for an additional account.		% OR \$ OF NET DISTRIBUTION				
Select one:	Account Type (Select one):	ABA Transit Routing Number:						
☐ Change	☐ Checking	Account Number:		%				
☐ Cancel	Savings	Name of Financial Institution:		or \$				
☐ No Change		Financial Institution City, State:		Ψ				
		ount of your direct deposit is ultimately deposited to a financial institution outsic						
my account, I autho details). If any of the	orize the University to ne above information	the University of Wisconsin to direct deposit funds to my account in the financial institution list initiate a correcting (debit) entry. <b>I understand that the authorization may be rejected or c</b> changes, I will promptly complete a new authorization agreement. If the direct deposit is not s . This will delay your check.	discontinued by the Un	iversity at any time (see back for				
Employee Signa	ture:	D	ate:	(mm/dd/yyyy)				
For Office Use O	nly Identification ve	rified by (Name): [	Date:					

#### **Direct Deposit of Payroll**

Note: Student Hourly employees are required to sign up for direct deposit as a condition of employment.

As an employee of the University of Wisconsin System, you are provided the convenience and security of having your pay automatically deposited into your personal bank, credit union or financial institution account.

Automatic deposit of your pay into the personal account of your choice means you can:

- Be assured your pay will be deposited on payday even when you are on vacation or out of town.\*
- Eliminate the danger of lost or stolen pay cards.

\*While most financial institutions post funds to accounts at the beginning of the bank business day, this is not a universal practice. It is strongly recommended that you check with your financial institution to determine when you funds will be available.

You may choose up to **three (3) accounts**, savings and/or checking, to have your pay directly deposited as long as the following conditions are met:

- Your financial institution(s) is located in the USA or Puerto Rico and is a member of the Automated Clearing House Association (ACHA); and
- 100% of your net pay is committed to direct deposit.

**Tips on Providing Checking Account Information** Check Example:

Routing Number Account Number Check (Exactly 9 digits)

Do not include your check number, which appears to the right of both your Routing Number and your Checking Account Number. Your check number will match the number printed at the upper right corner of your check. Do not use the routing number at the bottom of a deposit slip as this number may not be correct. It is recommended that you check with your financial institution to verify the routing number for direct deposit. Incorrect routing and account information may cause a delay in receiving your funds.

This layout applies only to personal checking accounts and not to money market accounts. You will need to contact your money market advisor to get the necessary information for a money market account.

#### **Common Questions about direct deposit:**

#### How do I know that a deposit has been made to my account?

Your earnings statement will show how much you have earned, a detail of your deductions, and how much has been deposited to your account(s). Your financial institution will show the deposit on your monthly statement.

#### Where do I find my earnings statement?

Your earnings statement can be found in the Payroll Information app in the MyUW portal located at <a href="https://my.wisconsin.edu/">https://my.wisconsin.edu/</a>. UW-Madison employees should use MyUW Madison at: <a href="https://my.wisc.edu/">https://my.wisc.edu/</a>.

#### When will direct deposit begin?

The first pay period after the Payroll Office receives your direct deposit authorization form. Keep in mind that most payrolls are processed up to one week prior to the actual pay date. Please verify with your financial institution on your pay date that your direct deposit has gone into effect.

When will my pay be deposited into my account? Your pay will be deposited into your account(s) on your pay day. Funds will not be available prior to that date.

# What do I do if I want to change financial institutions or accounts once I am enrolled in the program?

If you change your financial institution or account, you must complete a new authorization form as soon as possible. You must include all of your accounts on the new form, even those accounts for which you are not making changes. For these accounts, simply provide the required information and check the "No Change" box.

# What will happen to my direct deposit if I cancel my account with my financial institution but don't cancel my direct deposit with the University of Wisconsin prior to the payroll being processed?

Your direct deposit will automatically be sent as though the account(s) were open. All funds submitted to the closed account will not become available until such funds are returned to the University of Wisconsin System by the financial institution. A pay card or paper check will then be issued. This may delay your payment.

# Can I direct deposit my pay into more than one financial institution account?

Yes. If you choose to direct deposit into two or three accounts, you must designate one account as your primary account and the others as a second and third account. The second and third accounts will require either a fixed amount or a percentage of net pay. Your pay will be split into the multiple accounts with the fixed and or percentage amounts deposited first and all remaining pay deposited to the primary account (unless 100% of your pay is deposited into the second and third accounts).

# Does it matter whether I designate my savings account as my primary account?

No. You may direct deposit into a checking or savings account, or any combination of up to three accounts.

#### If I have been gone for a period of time (or terminated employment) and return to work, do I need to complete a new form? (Examples: leave of absence without pay, sabbatical leave, etc.)

Possibly. Your direct deposit will remain active for up to fifteen months with **no** payroll activity. After that period of time all direct deposits will be inactivated and new forms will be required. **Please note:** If your financial institution or account numbers have changed, it is imperative that you submit a new direct deposit form.

# Do I need to submit a new direct deposit form if I am changing departments?

No, your existing authorization form will remain inforce.

# Why would my direct deposit not be processed? Possible reasons the entry of this information may be delayed:

- Writing is illegible.
- Missing data.
- Primary Account Net Pay amount is less than full Net Pay and missing Second Account information.
- Form received too late for processing prior to bi- weekly or monthly final payroll calculation
- Your completed form is received by email.
- Form has not passed campus identity validation.

#### Where do I submit my completed form?

UW-Madison employees should submit their form in person to: Office of Human Resources
21 N. Park St., Suite 5101
Madison, WI 53715

All other employees should submit their completed form to their central payroll office:

https://www.wisconsin.edu/ohrwd/hr/contact/



# **Human Resources and Diversity**

# **ACA Acknowledgement Letter**

## Agreement and Verification of Hours of Work for Student Employment

This agreement sets forth the terms and expectations in regard to a student's obligations and responsibilities for limiting the hours of student work in one or more student employment capacities in accordance with the Patient Protection and Affordable Care Act of 2010 ("ACA")<sup>i</sup>. The UW System Student Employment Policy (<u>GEN 20</u>) provides the administrative requirements for student employment and the limitation on the number of hours a student may work while employed at UW-Whitewater. See GEN 20: <a href="https://www.wisconsin.edu/ohrwd/download/policies/ops/gen20.pdf/">https://www.wisconsin.edu/ohrwd/download/policies/ops/gen20.pdf/</a>.

By signing this document below, the student employee verifies that the student employee has been notified of the limitations on the hours worked in a student employment capacity (including combined hours for multiple student employment positions within the institution or for other UW institutions) and agrees to comply with the following terms and provisions, in addition to any other state law, institutional or system policy or rule:

- I shall not work in excess of 25 combined hours of work per week during the academic year, nor will I exceed 40 hours per week of combined work during academic breaks and/or the summer academic term or period. (See the attached "ACA Calendar").
- I will be solely and individually responsible for scheduling my hours of work each week in a manner that is consistent with the terms herein, which includes all student employment throughout this institution or other institutions, including those paid by lump sum. I will verify my work schedule with my immediate supervisor and make any necessary modifications, if necessary to remain compliant with this agreement. I will promptly report all hours worked, as requested by my supervisor, to help ensure accurate monitoring and compliance.
- The institution, as my employer, has the unilateral discretion and right to determine my hours of work in accordance with the operational needs of the institution and to comply with the ACA and related laws and policies.
- I understand that my student employment is an "at will" employment relationship with the institution. I hereby agree that the institution shall have the immediate and unilateral right to end my student employment for any reason, including my failure to adhere to the terms herein, with no notice required.
- I shall abide by this agreement and all related institutional, System and Board of Regent policies regarding student employees, including related state or federal laws or regulations.<sup>iii</sup>

Please sign and complete the information below and return the original document to the Office of Human Resources, Hyer Hall 330. Copies shall be provided upon request.

Student WINS ID#:	Received by Office of Human Resources:
Student's Name (printed):	Name of HR Rep:
Date:	Date of Receipt:
Supervisor Name:	Student EMPID:
Student Employee's Signature:	

<sup>&</sup>lt;sup>i</sup> Pursuant to the ACA, the University of Wisconsin may incur a penalty for failing to offer health care benefits to any person defined as a "full time employee" (any individual paid a wage for hours worked on average in excess of 30 hours a week). However, individuals serving in a student employment capacity are not eligible to receive health insurance benefits under the UW employer-sponsored health coverage (the State of Wisconsin Group Health Insurance Program).

The hours of work to be counted shall not include hours paid through a Federal Work Study program.

 $<sup>^{</sup> ext{iii}}$  International students (F1 and J1) are limited to 20 hours per week during the academic semesters. .