

## What changes have been made to accommodate the 2020 W-4 form?

### See notations for Phase Two updates

Based on the changes made to the 2020 W-4 form, several new fields have been added to the HRM system. The values for these fields will be stored in PRREGPARM. You may need to evaluate your security setup for the PRREGPARM table to ensure your employees have the proper access to update these fields.

A new tab was added to Employee United States Taxes (PR13.1) to accommodate the new fields on the 2020 W-4 form. You will find these new fields on the **Tax Info 2** tab:

The screenshot shows the 'PR13.1 - Employee United States Taxes' form, specifically the 'Tax Info 1' tab. The form includes fields for Company, Employee, State, County, City, Sch Dst, Workers Comp State, EIC Status, Group Code, and Tax Frequency. A 'State Rpt' button is visible. Below these fields is a table with columns: FC, Ded, Description, Res, Mar Stat, Exempt Number, Exempt Amount, Tax Exm, and Cert Code. The 'Tax Info 2' tab is highlighted with a red circle.

- The **Tax Info 2** tab contains all the new fields for the 2020 W-4s

The screenshot shows the 'PR13.1 - Employee United States Taxes' form, specifically the 'Tax Info 2' tab. The form includes fields for Company, Employee, State, County, City, Sch Dst, Workers Comp State, EIC Status, Group Code, and Tax Frequency. A 'State Rpt' button is visible. Below these fields is a table with columns: FC, Ded, Description, Res, Mar Stat, Exempt Number, Exempt Amount, Tax Exm, and Cert Code. The 'Form Year' field is highlighted with a red circle.

## Employee United States Taxes (PR13.1) new field details:

### **Form Year (FLD-NBR=6001)**

Because there is no requirement for existing employees to complete the 2020 W-4 field, the Form Year field is required to be passed to BSI so that the appropriate tax tables are used. The Form Year is sent to BSI to use the 2020 tax tables. If this is not passed (i.e. If no 2020 W-4 filled out, BSI will utilize other tax tables).

### **Multiple Jobs (FLD-NBR=6002)**

Corresponds to Step 2 on the 2020 W-4. Yes/No field, if this box is checked, 'Yes' value would be selected.

### **Dependents (FLD-NBR=6003)**

Corresponds to Step 3 on the 2020 W-4. Enter the combined dependent fields amount from the form.

### **Other Income (FLD-NBR=6004)**

Corresponds to Step 4a on the 2020 W-4. Enter the amount of other income to be taxed.

### **Deductions (FLD-NBR=6005)**

Corresponds to Step 4b on the 2020 W-4. Enter the amount of deductions other than the standard deduction to reduce your withholding based on the Deductions Worksheet on page 3 of the W-4 form.

**JT-1372162 UPDATE (separate from Phase Two JT):** These fields are now able to successfully be stored to HRHISTORY

## Additional Information:

Corresponding to Step 4c on the 2020 W-4, Extra Withholding Amount remains populated on the **Tax Info 1** tab with the appropriate Tax Code

The screenshot shows the PR13.1 - Employee United States Taxes form, specifically the Tax Info 1 tab. The form includes various input fields for employee information, a table for exemptions, and a section for tax code and amount.

**Form Fields:**

- Company: [Dropdown]
- Employee: [Dropdown]
- Resident: [Radio]
- Work: [Radio]
- State: [Dropdown]
- County: [Dropdown]
- City: [Dropdown]
- Sch Dst: [Dropdown]
- Workers Comp State: [Dropdown]
- EIC Status: [Dropdown]
- Group Code: [Dropdown]
- Tax Frequency: [Dropdown]

**Exemptions Table:**

FC	Ded	Description	Res	Mar Stat	Exempt Number	Exempt Amount	Tax Exm	Cert Code
[Dropdown]	[Dropdown]	[Text]	[Dropdown]	[Dropdown]	[Text]	[Text]	[Dropdown]	[Dropdown]
[Dropdown]	[Dropdown]	[Text]	[Dropdown]	[Dropdown]	[Text]	[Text]	[Dropdown]	[Dropdown]
[Dropdown]	[Dropdown]	[Text]	[Dropdown]	[Dropdown]	[Text]	[Text]	[Dropdown]	[Dropdown]
[Dropdown]	[Dropdown]	[Text]	[Dropdown]	[Dropdown]	[Text]	[Text]	[Dropdown]	[Dropdown]

**Tax Info 1 Section:**

- Tab: Tax Info 1 (Selected)
- Other tabs: Addl Exemptions, Tax Info 2, Effective Dates
- Tax Code: [Dropdown]
- Rate: [Text]
- Amount: [Text]
- Formula: [Text]

## Marital Status Values

For the 2020 W-4, the IRS changed the Marital Status values on the W-4 form.

There are now 5 valid values for 2020 marital status:

Single

Married Filing Separately

Married Filing Jointly

Qualifying Widower

Head of Household

**\*\*Note that the status of '02=Married' is no longer valid for 2020 and later, therefore employees may need to evaluate which of the new marital status values best suits their taxation needs.**

BSI has adjusted the Marital Status values to accommodate for the new values on the 2020 W-4. These values exist on the PR13.1 as the following values:

- **Single or Married Filing Separately**
  - o Status = 01-Single
  - o Status = 03-Married Filing Separately
- **Married Filing Jointly (or Qualifying Widower)**
  - o Status = 04-Married, Both Spouses Working
  - o Status = 08-Widow or Widower
- **Head of Household**
  - o Status = 06-Head of Household

Any option that has multiple values (i.e. Single or Married Filing Separately) will default to the first value when selecting in Employee Self Service (i.e. Single or Married Filing Separately will default to Single). These values can be changed on the PR13.1.

The Marital Status values and descriptions shown on the PR13.1 correspond to the values and descriptions provided by BSI and the Internal Revenue Service.

### **Exemptions**

Exemptions are no longer valid for Tax Year 2020, however, because it is not mandatory for employees to fill out a 2020 W-4 the exemption field must remain. When an employee fills out a 2020 W-4 and had exemptions from prior years, that data will **not** be cleared out as it is valid historical data and is needed if retro payments are processed. However, changes have been made to hide this field's value when selecting Tax Withholding in Employee Self Service if a 2020 or later W-4 has been entered.

If a company wishes to clear out the Exemptions field, that can be done on PR13.1. You will want to ensure that you will not be making any retro payments to the employee prior to clearing out the field.

Because Infor is sending the Form Year=2020 to BSI as required, BSI will then ignore any fields that are sent from previous W-4s (i.e. Number of exemptions) so that data will not be used in any tax calculations.

### **Tax Calculations**

All tax calculations are handled by BSI. In order to accurately calculate Federal taxes for 2020 W-4 information, you must be on **TaxFactory 10.0.w** with at least **Bulletin #179**.

## HRM 2020 W-4 Phase Two Updates

Due to the number of enhancements needing to be done after the IRS released the final 2020 W-4 version on December 5, 2019, the decision was made to release just basic W-4 processing in order to be available January 1, 2020.

The following updates are being released with HRM **JT-1366801**:

**NOTE:** Due to interdependencies between W-4 Phase 2 and TaxFactory 10.0.x updates, a DBREORG may be required when applying JT-1366801

### Tax Withholding Lock-in (PR14.2):

- Updated with 2020 W-4 fields

The screenshot displays the 'PR14.2 - Tax Withholding Lock-In' form. The top navigation bar includes 'Data View', 'Special Actions', 'Change', 'Previous', 'Inquire', 'Next', 'Inquire', and 'Related Forms'. The form fields are organized into two columns. The left column contains: 'Company' (5297QE), 'Employee' (1170QE), 'Deduction' (FIT QE), 'Lock In' (dropdown), 'Marital Status' (01), 'Exempt Number' (empty), 'Multiple Jobs' (2), 'Dependents' (2500.00), 'Other Income' (empty), and 'Deductions' (empty). The right column contains: 'HR Company', 'Minnesota, Test', 'Federal Income Tax', 'Not applicable', 'Single', and 'Yes'. A red box highlights the 'Multiple Jobs' field and the 'Dependents' field. Below the main form area, there is a section titled 'Additional Tax Fields' which lists: 'Exempt Amount', 'Tax Exempt Flag', 'Personal Exemptions', 'Dependent Exemptions', 'Additional Exemptions', 'Additional Amount', 'Additional Tax Code', 'Rate', 'Amount', and 'Formula Number'.

## Employee United States Taxes (PR13.1):

- 1) Change Marital Status = 04 description to align with BSI changes
  - a. 04=Married, Both Spouses Working
  - i. Now 04=Married or CU (*civil union*) Filing Jointly

PR13.1 - Employee United States Taxes

Data View | Special Actions | Change | Previous | Inquire | Next | Inquire | Related Forms

Company: 5297 QE HR Company  
Employee: 1000 QE Kirk, James T.

State: ND QE North Dakota  
County: QE  
City: QE  
Sch Dst: QE

Workers Comp State: MN QE Minnesota  
EIC Status:   
Group Code: 401 QE

BSI

Tax Locations  
State Rpt

Marital Status dropdown menu:

- 01 - Single
- 02 - Married
- 03 - Married Filing Separate
- 04 - Married or CU Filing Jointly**
- 05 - Married One Spouse Working
- 06 - Head of Household
- 07 - Married Multiple Employers
- 08 - Widow or Widower
- 09 - Married Not Living With Spouse
- 10 - Married Joint Claiming All
- 11 - Married Joint Claiming Half

FC	Ded	Description	Res	Mar	Stat	Exempt	Exempt	Tax	Cert
						Number	Amount	Exm	Code
C	FIT	Federal Income Tax	Y		01			-	
	MNIT	Minnesota Income Tax	N			2		-	
	NDIT	North Dakota Income Tax	Y					Y	
								-	

- 2) Marital Status on the Federal deduction will now only allow valid Federal Marital Status values to be entered for 2020 and beyond for the Federal Withholding deduction
  - a. Valid 2020 Federal values are: 01, 03, 04, 06, 08
  - i. When Form Year=2020 or later

PR13.1 - Employee United States Taxes

Data View | Special Actions | Change | Previous | Inquire | Next | Inquire | Related Forms

Company: 5297 QE HR Company  
Employee: 1000 QE Kirk, James T.

State: ND QE North Dakota  
County: QE  
City: QE  
Sch Dst: QE

Workers Comp State: MN QE Minnesota  
EIC Status:   
Group Code: 401 QE

BSI

Tax Frequency: 20

Invalid Federal Marital Status. Valid Values=01,03,04,06,08

FC	Ded	Description	Res	Mar	Stat	Exempt	Exempt	Tax	Cert
						Number	Amount	Exm	Code
C	FIT	Federal Income Tax	Y		02			-	
	MNIT	Minnesota Income Tax	N			2		-	
	NDIT	North Dakota Income Tax	Y					Y	
								-	

[ 10:47:53 - PR13.1 Invalid Federal Marital Status. Valid Values=01,03,04,06,08 ]

- 3) Allow for the 2020 W-4 fields to be used by states
  - a. Meant to be used by those states that utilize the Federal W-4
    - i. Colorado, New Mexico, North Dakota, Utah (as of 03/2020)
  - b. If data is populated for states that do not use these fields, the data will be ignored

PR13.1 - Employee United States Taxes

Data View | Special Actions | Change | Previous | Inquire | Next | Inquire | Related Forms

Company: 5297 QF HR Company  
 Employee: 1000 QF Kirk, James T.  
 Resident: \_\_\_\_\_ Work: \_\_\_\_\_

State: ND QF North Dakota  
 County: \_\_\_\_\_ QF  
 City: \_\_\_\_\_ QF  
 Sch Dst: \_\_\_\_\_ QF

Workers Comp State: MN QF Minnesota  
 EIC Status: \_\_\_\_\_  
 Group Code: 401 QF Tax Frequency: 20

BSI

FC	Ded	Description	Res	Mar	Stat	Exempt Number	Exempt Amount	Tax Exm	Cert Code
▼	FIT QF	Federal Income Tax	Y	▼	01			-	▼
▼	MNIT QF	Minnesota Income Tax	N	▼	01	2		-	▼
▼	NDIT QF	North Dakota Income Tax	Y	▼	01			Y	▼
▼	QF		▼	▼				-	▼

Addl Exemptions Tax Info 1 Tax Info 2 Effective Dates

Form Year: 2020 Multiple Jobs: 1 No Dependents: 2500.00 Other Income: 20000.00 Deductions: \_\_\_\_\_

- 4) Allow blank Marital Status value if claiming 'Exempt'
  - a. When an employee claims 'Exempt', marital status can now be blank or contain a value
  - b. When claiming 'Exempt' in Employee Self Service, the default value will be blank but can be changed on PR13.1

PR13.1 - Employee United States Taxes

Data View | Special Actions | Change | Previous | Inquire | Next | Inquire | Related Forms

Company: 5297 QF HR Company  
 Employee: 1000 QF Kirk, James T.  
 Resident: \_\_\_\_\_ Work: \_\_\_\_\_

State: ND QF North Dakota  
 County: \_\_\_\_\_ QF  
 City: \_\_\_\_\_ QF  
 Sch Dst: \_\_\_\_\_ QF

Workers Comp State: MN QF Minnesota  
 EIC Status: \_\_\_\_\_  
 Group Code: 401 QF Tax Frequency: 20

BSI

FC	Ded	Description	Res	Mar Stat	Exempt Number	Exempt Amount	Tax Exm	Cert Code
▼	FIT QF	Federal Income Tax	Y	▼			Y	▼
▼	MNIT QF	Minnesota Income Tax	N	01	2		-	▼
▼	NDIT QF	North Dakota Income Tax	Y	▼			Y	▼
▼	QF		▼	▼			-	▼

North Dakota follows the Federal W-4

## Employee United States Taxes (PR13.2):

- 1) Updated with 2020 W-4 fields
  - a. Same functionality as is available on PR13.1

PR13.2 - Employee United States Taxes

← Back Detach Special Actions ▾ Change Inquire Change ▾

Employee 1170 Minnesota, Test

Tax Locations

FC	Ded	Description	Res	Mar Stat	Exempt Number	Exempt Amount	Tax Exm	Cert Code
C ▾	FIT QE	Federal Income Tax	Y ▾	01 ▾			- ▾	▾
▾	MNIT QE	Minnesota Income Tax	Y ▾	01 ▾			- ▾	▾
▾	QE		▾	▾			- ▾	▾
▾	QE		▾	▾			- ▾	▾
▾	QE		▾	▾			- ▾	▾
▾	QE		▾	▾			- ▾	▾
▾	QE		▾	▾			- ▾	▾
▾	QE		▾	▾			- ▾	▾
▾	QE		▾	▾			- ▾	▾
▾	QE		▾	▾			- ▾	▾
▾	QE		▾	▾			- ▾	▾
▾	QE		▾	▾			- ▾	▾
▾	QE		▾	▾			- ▾	▾

Addl Exemptions Tax Info 1 Tax Info 2 Effective Dates

Form Year 2020 Multiple Jobs 2 ▾ Yes Dependents 2500 Other Income Deductions

## Payment Modeling (PR89):

- 1) Updated to accommodate for the 2020 W-4 fields
  - a. Federal and State/Local have been separated into 2 tabs

PR89.1 - Payment Modeling

Data View ▾ Special Actions ▾ Previous Inquire Next Inquire ▾

Company 5297 QE HR Company

Employee Fed Tax State/Local Tax Deductions Result

Employee 1000 QE Kirk, James T.

Payment Date 03/11/2020

Hours 80.00

Gross Amount 2000.00 Tax - ▾ Regular Method

Net Amount

Pay Frequency 2 ▾ Bi-Weekly

Salary Class H ▾ Hourly

Pay Rate 25.0000 QE

Schedule QE

Grade QE

Step QE



b. Both tabs have the 2020 W-4 fields added

PR89.1 - Payment Modeling

Data View ▾ | Special Actions ▾ | Previous ◀ | Inquire 🔍 | Next ▶ | Inquire ▾

Company 5297QF HR Company

Employee **Fed Tax** State/Local Tax Deductions Result

— Federal —

Exemptions

Marital Status 01 ▾ Single

Override ▾

Amount or Percent

Location MINN QF

Form Year 2020

Multiple Jobs 1 ▾ No

Dependents  2500.00

Other Income

Deductions

PR89.1 - Payment Modeling

Data View ▾ | Special Actions ▾ | Previous ◀ | Inquire 🔍 | Next ▶ | Inquire ▾

Company 5297QF HR Company

Employee Fed Tax **State/Local Tax** Deductions Result

— State —

Tax State ND QF Y ▾ North Dakota

Exemptions

Marital Status 01 ▾ Single

Override ▾

Amount or Percent

BSI Formula

Multiple Jobs 1 ▾ No

Form Year 2020

Dependents  2500.00

Other Income  20000.00

Deductions

— Local —

County Authority  QF ▾

City Authority  QF ▾

School Authority  QF ▾

Payment Print (PR160) → PMTOUT <DEDS> Record:

1) 2020 W-4 fields added for both Federal and State

169-169	FED-RGP-MULTIPLE-JOBS	Multiple Jobs	Numeric 1 position	1=No, 2=Yes	
170-181	FED-RGP-DEPENDENTS	Dependents	Signed 11 positions 2 decimals		9999999999S where S = + or -
182-193	FED-RGP-OTHER-INCOME	Other Income	Signed 11 positions 2 decimals		9999999999S where S = + or -
194-205	FED-RGP-DEDUCTIONS	Deductions	Signed 11 positions 2 decimals		9999999999S where S = + or -
206-206	ST-RGP-MULTIPLE-JOBS	Multiple Jobs	Numeric 1 position	1=No, 2=Yes	
207-217	ST-RGP-DEPENDENTS	Dependents	Signed 11 positions 2 decimals		9999999999S where S = + or -
218-228	ST-RGP-OTHER-INCOME	Other Income	Signed 11 positions 2 decimals		9999999999S where S = + or -
229-239	ST-RGP-DEDUCTIONS	Deductions	Signed 11 positions 2 decimals		9999999999S where S = + or -

## Employee Self Service Updates for 2020 W-4

As in prior years, Employee Self Service will display an electronic representation of the Federal W-4 form to be filled out. Once updated, the data is updated to PR13.1/PRREGPARM. Note that this is not a 'true' electronic form, simply an electronic representation of the Federal W-4 form.

When selecting the Tax Withholding bookmark under Employee Self Service > Pay, the initial screen will show the new 2020 W-4 fields and their values.

Tax Withholding										
Tax Withholding										
Deductions										
	Description	Resident Status	Marital Status	Exemptions	Exempt	Additional Exemptions	Additional Amount	Dependents	Other Income	Deductions
→	Federal Income Tax	Resident	Single	0	No	0				
→	Minnesota Income Tax	Resident	Married	0	No	0				

Starting January 1, 2020, selecting the Federal Income Tax link will present the new W-4 form

Tax Withholding										
Tax Withholding										
W-4 Form										
Employee's Withholding Allowance Certificate										
OMB No. 1545-0074 <b>2020</b>										
Form <b>W-4</b> Department of the Treasury Internal Revenue Service										
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. Your withholding is subject to review by the IRS.										
(a) First name and middle initial James T. Address 6625 Jersey Ave N City or town, state, and ZIP code Minneapolis, MN 55428 (c) <input checked="" type="radio"/> Single or Married filing separately <input type="radio"/> Married filing jointly (or Qualifying widow(er)) <input type="radio"/> Head of Household (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.)										
(b) Social security number 1000 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.										
Step 1: Enter Personal Information										
Complete Steps 2-4 ONLY if they apply to you; otherwise, skip to Step 5. See page 2 for more information on each step, who can claim exemption from withholding, when to use the online estimator, and privacy.										
Step 2: Multiple Jobs or Spouse Works (a) Use the estimator at <a href="http://www.irs.gov/W4App">www.irs.gov/W4App</a> for most accurate withholding for this step (and Steps 3-4); or (b) Use the Multiple Jobs Worksheet on page 3 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. <input checked="" type="checkbox"/> TIP: To be accurate, submit a 2020 Form W-4 for all other jobs. If you (or your spouse) have self-employment income, including as an independent contractor, use the estimator. 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 3-4(b) on the Form W-4 for the highest paying job.) If your income will be \$200,000 or less (\$400,000 or less if married filing jointly):										
Step 3: Claim Dependents Multiply the number of qualifying children under age 17 by \$2,000. <input type="text" value="2000.00"/> Multiply the number of other dependents by \$500. <input type="text" value="500.00"/> Add the amounts above and enter the total here. <input type="text" value="2500.00"/>										
Step 4 (optional): Other Adjustments (a) Other income (not from jobs). 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. 4(a) \$ 14000.00 (b) 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. 4(b) \$ 3500.00 (c) Extra withholding. Enter any additional tax you want withheld each pay period. 4(c) \$ 50.00										
Step 5: Sign Here Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete. Employee's signature (This form is not valid unless you sign it.) Employer's name and address Date First date of employment Employer identification number (EIN)										
For Privacy Act and Paperwork Reduction Act Notice, see page 3.										
<a href="#">Continue</a> <a href="#">Model</a> <a href="#">Back</a> <a href="#">Print</a> <a href="#">W-4 Instructions</a>										

Once the new data is entered and Update is selected, the information will be updated to the initial screen

Tax Withholding										
Tax Withholding										
Deductions										
	Description	Resident Status	Marital Status	Exemptions	Exempt	Additional Exemptions	Additional Amount	Dependents	Other Income	Deductions
→	Federal Income Tax	Resident	Single	0	No	0	\$ 50.00	\$ 2500	\$ 14000	\$ 3500
→	Minnesota Income Tax	Resident	Married	0	No	0				

Employee United States Taxes (PR13.1) will also be updated

NOTE: The Form Year field will be automatically populated on the PR13.1 when changes are made via Employee Self Service

PR13.1 - Employee United States Taxes

Data View | Special Actions | Change | Previous | Inquire | Next | Inquire | Related Forms

Company: 529705 HR Company  
Employee: 100005 Kirk, James T.  
Resident:   
State: MN Minnesota  
County:   
City:   
Sch Dst:   
Workers Comp State: MN Minnesota  
EIC Status:   
Group Code: 401  
Tax Frequency: 20

FC	Ded	Description	Res	Mar	Stat	Exempt Number	Exempt Amount	Tax Exm	Cert Code
	FIT	Federal Income Tax	Y		01				
	MNIT	Minnesota Income Tax	Y		02				

Addl Exemptions | Addl Tax Info 1 | **Addl Tax Info 2** | Effective Dates

Form Year: 2020 | Multiple Jobs: 2 | Yes  
Dependents: 2500.00 | Other Income: 14000.00 | Deductions: 3500.00

**NOTE:** The IRS has removed the “Exempt” field from the 2020 W-4. Per IRS instructions:

**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.

Infor provides an electronic representation of the W-4 form. Any employee wanting to claim exemption from withholding in 2020 would need to print the Employee Self Service form, write “Exempt” below Step 4(c) and have the change made directly on the Employee United States Taxes (PR13.1).

## Employee Self Service PHASE TWO Updates (Part One):

Due to the number of enhancements needing to be done after the IRS released the final 2020 W-4 version on December 5, 2019, the decision was made to release just basic processing in order to be available January 1, 2020.

These Phase Two EMSS updates will be released in two parts in order to get the most urgently requested items release first.

The following items are being released with Employee and Manager Self Service updates **10.0.7.0.38** and **10.0.8.0.18**:

### Previous Year Exemptions:

- 1) If a 2020 W-4 has been entered, the Number of Exemptions from prior years will be 'hidden'. The presence of "\*\*\*" will indicate to the employee that there exists historical data for prior years
  - a. Because of interdependencies with S3 and BSI, at this time this will only affect the Federal Withholding
    - i. For those states that follow the Federal W-4, this functionality for State Withholding will be included in a future release

Tax Withholding										
Deductions										
	Description	Resident Status	Marital Status	Exemptions	Exempt	Additional Exemptions	Additional Amount	Dependents	Other Income	Deductions
→	Federal Income Tax	Resident	Single	***	No	***		\$ 3000.00		
→	North Dakota Income Tax	Resident	Single	0	No	0				

### Step 3-Claim Dependents:

- 1) Step 3 values will be edited to ensure that amounts entered conform to the noted requirements

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

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. .... \$ 1000.00

Step 3: Claim Dependents

Error: Invalid number. Value entered must be a multiple of 2000.

Multiply the number of other dependents by \$500. .... \$ 0

Add the amounts above and enter the total here. .... 3 \$ 1000.00

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

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. .... \$ 0

Step 3: Claim Dependents

Multiply the number of other dependents by \$500. .... \$ 200.00

Error: Invalid number. Value entered must be a multiple of 500.

Add the amounts above and enter the total here. .... 3 \$ 200.00

## Payment Modeling:

- 1) Payment Modeling button has been updated to accommodate for the new W-4 fields for both Federal and State

Payment Modeling

Calculator

Wages

Pay Rate 25.0000

Hours 80.00

Gross Amount 2000.00

Net Amount 140.27

Frequency Every 2 Weeks

Taxes

Federal

Exemptions 0

Marital Status Married Both Spouses Working

Extra Withholding Amount

Form Year

Multiple Jobs

Dependents

Other Income

Deductions

State

State ND QE North Dakota

Exemptions 3

Marital Status Single

Extra Withholding Amount

Form Year

Multiple Jobs

Dependents

Other Income

Deductions

Local

County QE

City QE

School QE

Results

Gross Amount 2000.00

Net Amount 140.27

Hours 80.00

Pay Rate 25.00

Federal

State

Social Security 124.00

Medicare 29.00

County

City

School

Other

Exempt

Section 125

401(k) 1600.00

403(b)

457(b)

457(b) Exempt Entity

457(f)

7701(j)

Other Deferred Compensation

Aftertax 106.73

409(a)

Social Security 124.00

Medicare 29.00

County

City

School

Other

Exempt

Section 125

401(k) 1600.00

403(b)

457(b)

457(b) Exempt Entity

457(f)

7701(j)

Other Deferred Compensation

Aftertax 106.73

409(a)

[ 08:51:03 - Home ] Ready

## Employee Self Service PHASE TWO Updates (Part Two):

Due to the number of enhancements needing to be done after the IRS released the final 2020 W-4 version on December 5, 2019, the decision was made to release just basic processing in order to be available January 1, 2020. These Phase Two updates are released in two parts in order to get the most urgently requested items released first.

The following items are being released with Employee and Manager Self Service updates **10.0.7.0.39** and **10.0.8.0.19**:

### Claiming Exempt:

- 1) A button for claiming 'Exempt' is now available on the W-4
  - a. Works in conjunction with HS23 to show/hide button
  - b. When printing, will include the word 'EXEMPT' in the space below Step 4(c)
  - c. Marital Status will default to 'blank' when claiming exempt as per IRS instructions
    - i. Can be changed on PR13.1 if Marital Status is desired

The screenshot shows the 'Tax Withholding' form. The 'Claim Exempt' button is highlighted with a red circle. The form includes sections for W-4 Form, Step 2: Multiple Jobs or Spouse Works, Step 3: Claim Dependents, Step 4 (optional): Other Adjustments, and Step 5: Sign Here. The 'Claim Exempt' button is located at the bottom right of the form, next to the 'Continue' button.

The screenshot shows the 'Tax Withholding' form with the 'EXEMPT' label highlighted in a red circle. The form includes sections for W-4 Form, Step 2: Multiple Jobs or Spouse Works, Step 3: Claim Dependents, Step 4 (optional): Other Adjustments, and Step 5: Sign Here. The 'EXEMPT' label is located at the bottom right of the form, next to the 'Continue' button.

## Email Process Flow:

### 1) Email Process Flows have been updated for 2020 W-4 fields

Company	Employee Number	Employee Name	Social Security Number	Employee Home Process Level	Employee Department
5013	120219	Moreno Pay Check	XXX-XX-2012	EMSS1	

Old Deduction:

Description	Resident Status	Marital Status	Exemptions	Additional Exemptions	Additional Amount	Form Year	Multiple Jobs	Dependent Amount	Other Income	Deduction Amount
Federal Withholding	Resident		***	***	\$ 0.00	2020	No	\$ 0.00	\$ 0.00	\$ 0.00

New Deduction:

Description	Resident Status	Marital Status	Exemptions	Additional Exemptions	Additional Amount	Form Year	Multiple Jobs	Dependent Amount	Other Income	Deduction Amount
Federal Withholding	Resident	Single	***	***	\$ 100.00	2020	Yes	\$ 3,550.00	\$ 1,050.00	\$ 200.00

## Step 3-Claim Dependents:

### 1) Update Line 3 to be editable

- Because Line 3 can include other tax credits in addition to the dependents (i.e. Education Tax credits, Foreign Tax credits, etc.), the field needs to be editable.
- The total of the boxes for qualifying children and other dependents will continue to default into Line 3, but the ability to add additional tax credits to Line 3 is now available

**Tax Withholding**

W-4 Form

Step 2: Multiple Jobs or Spouse Works

(a) Use the estimator at [www.irs.gov/W4App](http://www.irs.gov/W4App) for most accurate withholding for this step (and Steps 3-4); or

(b) Use the Multiple Jobs Worksheet on page 3 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. ☐

TIP: To be accurate, submit a 2020 Form W-4 for all other jobs. If you (or your spouse) have self-employment income, including as an independent contractor, use the estimator.

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

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

Step 3: Claim Dependents

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

Multiply the number of other dependents by \$500.

Add the amounts above and enter the total here.

Step 4 (optional): Other Adjustments

(a) Other income (not from jobs). 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. 4(a) \$

(b) 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. 4(b) \$

(c) Extra withholding. Enter any additional tax you want withheld each pay period. 4(c) \$

Step 5: Sign Here

Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.

Employee's signature (This form is not valid unless you sign it.)

Date First date of employment

Employer's name and address

Employer identification number (EIN)

For Privacy Act and Paperwork Reduction Act Notice, see page 3.

Continue Claim Exempt Model Back Print W-4 Instructions

## State Withholding:

- Add 2020 W-4 fields to the State Withholding to allow use by those states that utilize the Federal W-4
  - Not all will use these fields, therefore a note was added to remind employees to review individual state requirements
  - If data is populated for states that do not use these fields, the data will be ignored

**Tax Withholding**

North Dakota Income Tax

Required fields are indicated.

Residency

Status

Exemptions

Additional Amount

Multiple Jobs

Dependents

Other Income

Deductions

Continue Back

Note: Not all fields are applicable to all states, please review your state W-4 requirements.



### Updates for GHR

As with current W-4 information, the new 2020 W-4 fields will be updated from GHR via the Employee Additional Fields Interface (LT23.2) screen (accessed via the “Addtl Fields” button from LT11).

Once populated on the LT23.2, the HRM Receiver Update (LT111) is run to update the employee’s information onto Employee United States Taxes (PR13.1).

LT23.2 - Employee Additional Fields Interface

← Back

Detach

Special Actions ▾

Inquire

Inquire ▾

Company3004

Employee700443

TM Date Stamp11/11/2019

TM Obj-Id1101

TM Time Stamp17252049

Data Item	Value
Marital Status	6
Form Year	2020
Multiple Jobs	2
Dependents	450.00
Other Income	3,400.00
Deductions	5,433.00

[ 11:31:03 - Lawson ] Inquiry Complete

### Patch Notes

Description	JT Number	Notes
2020 W-4 Phase 1	JT-1318839	
2020 W-4 Phase 2	JT-1366801	
Fix: PR13.1 data removed when PR14 date changed	JT-1418279	Occurs in Patch10 only
Employee and Manager Self Service		EMSS updates are cumulative, apply the latest available patch for EMSS version 10.0.7 or 10.0.8