



## **How to Complete or make Changes to my Federal Income Tax Withholding**

### **How Do I Determine My Federal Income Tax Withholding?**

As an employee of The University of Texas at Tyler, you must complete a W-4 Withholding Certificate so that the University can withhold the correct federal income tax from each payroll payment.

It is important to note that, in accordance with the IRS regulations, if the W-4 Withholding Certificate is not completed in a timely manner once you have been hired, or if it has been completed incorrectly, the tax withheld must be based on a single filing status with NO allowances ("Single and 0").

The IRS website has a tax withholding estimator that looks similar to what you will see in UT Share/PeopleSoft. If you have questions about how you should complete your W-4 Withholding Certificate, please visit the IRS website to use the estimator feature.

<https://www.irs.gov/individuals/tax-withholding-estimator>

### **When Should I Consider Changing My W-4 Form?**






1. If you had a marital or dependent status change.
2. If you had to pay additional taxes when you filed your Form 1040 last year and expect similar circumstances this year.
3. If you got a substantial refund from the IRS last year and expect similar circumstances this year.
4. If you expect a lump-sum payroll payment for additional work, bonus pay, an award, or payout at end of employment, and you don't want the marginal tax rate to apply for that payment. Note: If you change your W-4 Withholding Certificate for that purpose, don't forget to change it back.

## How Do I Complete or Change My W-4 Status?

You can complete your W-4 Withholding Certificate for the first time or change your filing status at any time electronically using UT Share Peoplesoft via the Employee Self Service “home” screen.



Click on the Payroll and Compensation Tile to continue.

Payroll and Compensation	
	Pay
	<b>W-4 Tax Information</b>
	W-2/W-2c Consent
	Direct Deposit
	View W-2/W-2c Forms

From there, a menu populates on the left-hand side of the screen.

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

Complete the information requested in Steps 1 through 4 and when finished, click the **Submit** button found at the bottom of the screen.

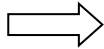
# W-4 Withholding Certificate

Social Security Number XXX-XX-

University of Texas, Tyler

For W4 associated with a different company, select a [Company](#)

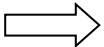
Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay.  
Your withholding is subject to review by the IRS [www.irs.gov](http://www.irs.gov).



## Step 1: Personal Information

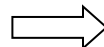
Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to [www.ssa.gov](http://www.ssa.gov).

Address



## 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.

## 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.

[View Instructions](#)

☐ 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.)

### Step 3: Claim Dependents

[View Instructions](#)

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

Multiply the number of other dependents by \$500

Other tax credits

Total

### Step 4: Other Adjustments

[View Instructions](#)

(a) Other Income

(b) Deductions

(c) Extra Withholding

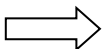
### Claim Exemption from Withholding

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

Please remember to use the IRS tax estimator or consult your personal tax advisor for specific information entered on the W-4 Withholding Certificate.

Please note that changes made to your W-4 Withholding Certificate may take place two payroll payments later depending on what payroll you are paid on (monthly or semi-monthly payroll)