New Federal Form W-4 Changes – 2020 (19.81036)

Overview

In 2020, Form W-4 eliminates some withholding allowances and adds other items to determine appropriate federal withholding for employees.

NOTE: The filing status you provide will be critical to the application in determining which calculation path is followed. Use one of the prior year filing statuses (Single or Married) when the employee(s) W-4 is from a year prior to 2020.

Use one of the new filing statuses when the employee uses the new 2020 W-4. If a valid filing status is not provided, the application will use the new filing status of Single or Married Filing Separately and will calculate tax withholding using the new calculation logic for 2020.

Calculate Withholding Using 2020 Form W-4 Data

Vertex calculates employee withholding using information from the 2020 Form W-4 as follows:

- · Basic withholding requires the following:
 - Wages
 - Filing status from the federal tax handle
- Filing status options are as follows:
 - Head of Household (ID 3)
 - Married Filing Jointly (ID 16)
 - Single or Married Filing Separately (ID 62)

If Vertex receives an invalid filing status, Single or Married Filing Separately is used, along with the standard withholding rate table.

The number of allowances no longer affects tax calculation. Vertex disregards withholding allowances if the information is passed in.

CMiC Program Modifications

CMiC has added four new fields to the pop-up window launched from the [Exemptions] button on the Tax tab of the Employee Profile to comply with the new Federal W-4 changes of 2020:

- 'Multi Job' checkbox to indicate employee having multiple jobs.
- Dependent Tax Credit Amount
- Other Income Amount
- Other Deduction Amount

Steps to Calculate Withholding

For Employees

The 2020 Form W-4 is now broken up into five steps for employees to complete (or to skip if they are not applicable):

- 1. Enter personal information, including filing status.
- 2. Account for multiple jobs.
- 3. Claim tax credits for dependents.
- 4. Make other adjustments.
- 5. Sign and date under penalties of perjury.

Steps 1 and 5 are required. Adjustments on steps 2, 3, and 4 are optional and are designed to make withholding calculations more accurate.

For Employers

Here are the steps employers will follow, based on employee entries on Form W-4.

When employees only complete steps 1 and 5, employers will withhold using the appropriate method based on the filing status and wage amounts.

When employees complete at least one of steps 2-4, employers will need to take these steps:

- Step 2: When an employee checks the box on Line 2, the employer will figure withholding from the higher rate tables, which will mean higher withholding. If the employee chooses one of the other two alternatives to account for multiple jobs, the additional withholding will be included with any other additional tax amounts per pay period in step 4, Line 4c.
- Step 3: Employers will use the amount entered by employees on Line 3 to claim their dependents
 as an annual reduction of tax. Employers should use the amount entered on Line 3 even if it is
 not equal to the sum of any amounts entered by employees on the left in step 3 because Line 3
 may be used to take into account other tax credits.
- Step 4: Employers will increase the annual amount of wages subject to withholding by the annual amount shown in Line 4a and reduce the annual amount of wages subject to withholding by the annual amount shown in Line 4b. Employers will increase withholding by the per pay period tax amount on Line 4c. Line 4d is where employees can claim an exemption from withholding.

Calculation Process

Vertex calculates withholding from information on the 2020 Federal Form W-4 using the following process:

- 1. Annualize current wages by number of pay periods.
- 2. If the Line 4a (Other income) amount is provided, add the amount to annual wages.
- 3. If the Line 4b (Deductions) amount is provided, subtract the amount from annual wages. Wages are also reduced by the value of the standard deduction.
- 4. Calculate tax on adjusted wages using the percentage method.
 - If the Form W-4 Step 2 checkbox (Multiple jobs) is cleared, Vertex uses the standard withholding rate schedule.
 - If the Form W-4 Step 2 checkbox is selected, Vertex uses the Step 2 withholding rate schedule.
- 5. Divide the calculated annual tax by the number of pay periods to determine the pay period withholding amount.
- 6. If the Line 3 (Dependents) amount is provided, divide this amount by the number of pay periods to determine the pay period amount.
- 7. Subtract the tax credits amount from the pay period withholding amount.
 - If the result is negative, tax is zero.
- 8. If the Line 4c (Extra withholding) amount is provided, add the amount of extra withholding to the pay period tax amount.

NOTE: If you pass in old Federal filing statuses with the new W4 data, the new data will be ignored. Same follows for the new filing statuses. If you pass us a new Federal filing status, Vertex will ignore the old number of exemptions data.

Federal Tax Changes

Federal Tax Changes effective January 1, 2020 based on December 2019 Vertex Release.

- Added the following standard deduction amounts:
 - \$12,900.00 for Married Filing Jointly filers
 - \$8,600.00 for Single or Married Filing Separately and Head of Household filers
- Increased withholding allowance from \$4,200.00 to \$4,300.00.
- The additional withholding amounts for Nonresident Aliens are as follows:
 - \$12,400.00 for employees who have filed a 2020 form W-4
 - \$8,100.00 for employees who have not filed a 2020 form W-4 and have a prior version on file
- Revised withholding tables.

Withholding Tax Rate Tables

	Standard Withholding Rate Schedule						
	Single or Married Filing Separately						
Line	If tavable was	;	Of the excess over				
Line	ne If taxable wages are		Amount	+ %	Of the excess over		
1	Not over	3,800.00		0.00%			
2		13,675.00	0.00	10.00%	3,800.00		
3		43,925.00	987.50	12.00%	13,675.00		
4		89,325.00	4,617.50	22.00%	43,925.00		
5		167,100.00	14,605.50	24.00%	89,325.00		
6		211,150.00	33,271.50	32.00%	167,100.00		
7		522,200.00	47,367.50	35.00%	211,150.00		
8	Over	522,200.00	156,235.00	37.00%	522,200.00		

	Married Filing Jointly						
Line	If taxable wages are	Tax	is	Of the excess over			
Line	ii taaabie wages are	Amount	+%	or the excess over			
1	Not over 11,900.00)	0.00%				
2	31,650.00	0.00	10.00%	11,900.00			
3	92,150.00	1,975.00	12.00%	31,650.00			
4	182,950.00	9,235.00	22.00%	92,150.00			
5	338,500.00	29,211.00	24.00%	182,950.00			
6	426,600.00	66,543.00	32.00%	338,500.00			
7	633,950.00	94,735.00	35.00%	426,600.00			
8	Over 633,950.00	167,307.50	37.00%	633,950.00			

	Head of Household						
Line	If taxable wages are		Tax is		Of the excess over		
Line	ii tanabic wages ar		Amount	+ %	or the excess over		
1	Not over 10	,050.00		0.00%			
2	24	,150.00	0.00	10.00%	10,050.00		
3	63	,750.00	1,410.00	12.00%	24,150.00		
4	95	,550.00	6,162.00	22.00%	63,750.00		
5	173	,350.00	13,158.00	24.00%	95,550.00		
6	217	,400.00	31,830.00	32.00%	173,350.00		
7	528	,450.00	45,926.00	35.00%	217,400.00		
8	Over 528	,450.00	154,793.50	37.00%	528,450.00		

Payroll Processed with Pay Date in 2020

Calculation Examples

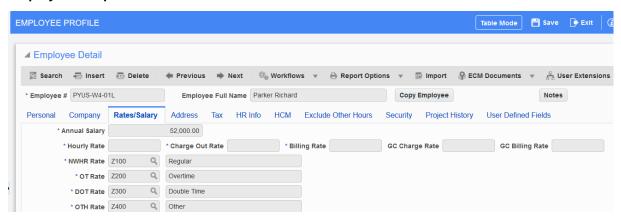
This section provides examples of Vertex calculations.

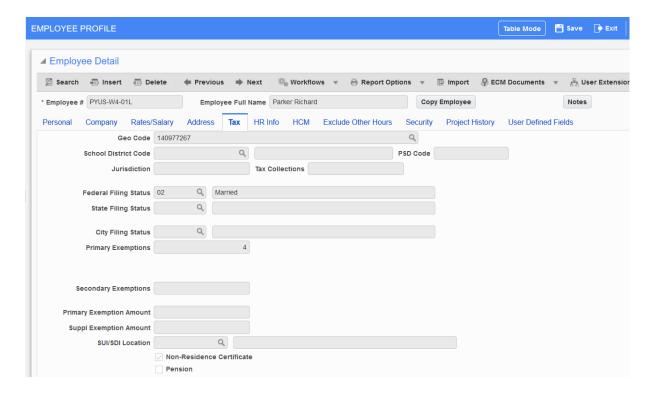
Example 1: Pre-2020 Form W-4

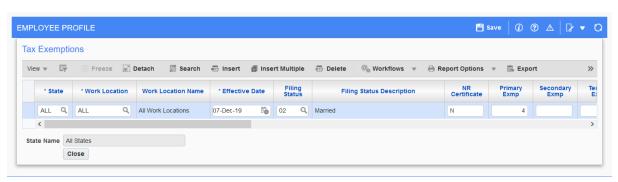
The following table shows the calculation process when information from a pre-2020 Form W-4 is passed in for an employee filing as Married (ID 2) with four exemptions:

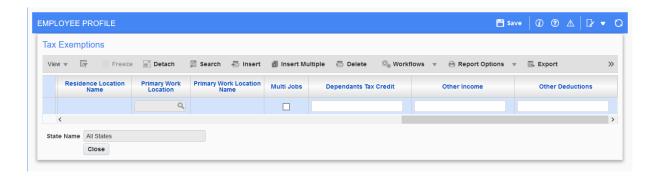
Step	Action	Result	Example
1	Multiply wages by the number of pay periods.	Annual wages	1,000.00 x 52 = 52,000.00
2	Calculate the withholding allowance amount.	Withholding allowance amount	4 x 4,300.00 = 17,200.00
3	Subtract the withholding allowance amount.	Annual taxable wages	52,000.00 - 17,200.00 = 34,800.00
4	Subtract the standard deduction.	Net taxable wages	34,800.00 - 31,650.00 = 3,150.00
5	Calculate the tax using the married filing jointly standard withholding rate schedule.	Annual tax	3,150.00 x 12% = 378.00 378.00 + 1,975.00 = 2,353.00
6	Divide the annual tax by the number of pay periods.	Pay period tax amount	2,353.00 / 52 = 45.25

Employee Setup









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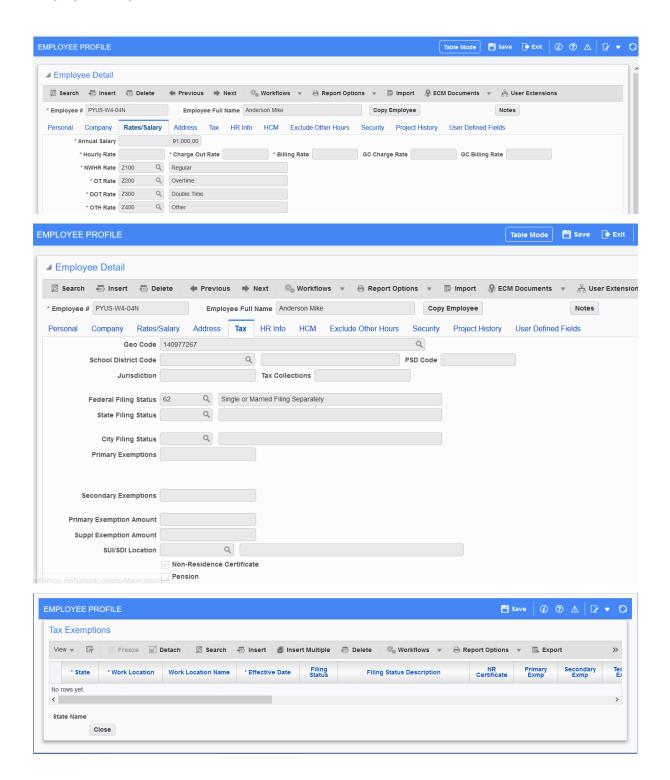
Example 2: 2020 Form W-4, Step 2 Checkbox Cleared

The following table shows the calculation process for the following information:

- 2020 Form W-4 with a cleared Step 2 (Multiple Jobs) checkbox
- Single or Married Filing Separately (ID 62)
- No exemptions

Step	Action	Result	Example
1	Multiply wages by the number of pay periods.	Annual wages	1,750.00 x 52 = 91,000.00
2	Subtract the standard deduction.	Annual taxable wages	91,000.00 - 8,600.00 = 82,400.00
3	Calculate the tax using the Single or Married Filing Separately standard withholding rate schedule.	Annual tax	82,400.00 - 43,925.00 = 38,475.00 38,475.00 x 22% = 8,464.50 8,464.50 + 4,617.50 = 13,082.00
4	Divide the annual tax by the number of pay periods.	Pay period tax amount	13,082.00 / 52 = 251.58

Employee Setup



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Example 3: 2020 Form W-4, Step 2 Checkbox Selected

The following table shows the calculation process for the following information:

- 2020 Form W-4 with a selected Step 2 (Multiple Jobs) checkbox
- Single or Married Filing Separately (ID 62)
- Other Income Step 4a (12,000.00)
- Deduction Step 4b (5,000.00)
- Dependents tax credit Step 3 (4,000.00)

Step	Action	Result	Example
1	Multiply wages by the number of pay periods.	Annual wages	2,884.50 x 52 = 149,994.00
2	Add the Other income amount.	Total annual wages	149,994.00 + 12,000.00 = 161,994.00
3	Subtract the deduction.	Net wages	161,994.00 - 5,000.00 = 156,994.00
4	Subtract the standard deduction.	Annual taxable wages	156,994.00 - 0.00 = 156,994.00
	Because the Step 2 (Multiple Jobs) checkbox is selected, the standard deduction is 0 (zero).		
5	Calculate the tax using the Single or Married Filing	Annual tax	156,994.00 - 109,875.00 = 47,119.00
	Separately Step 2 withholding rate schedule.		47,119.00 x 35% = 16,491.65
	rate soriedule.		16,491.65 + 23,683.75 = 40,175.40
6	Divide the annual tax by the number of pay periods.	Gross pay period tax amount	40,175.40 / 52 = 772.60
7	Determine the pay period Dependents tax credit and subtract it from the gross pay period tax amount.	Dependents tax credit	4,000.00 / 52 = 76.92.
8	Subtract the tax credit from the gross pay period tax amount.	Net pay period tax amount	772.60 - 76.92 = 695.68

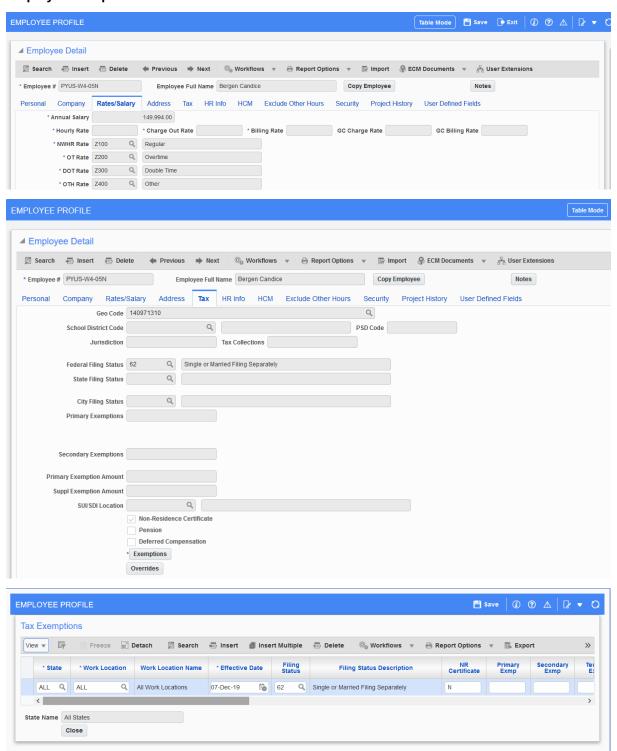
Vertex Payroll Tax Q Series Calculation Guide for the United States Federal

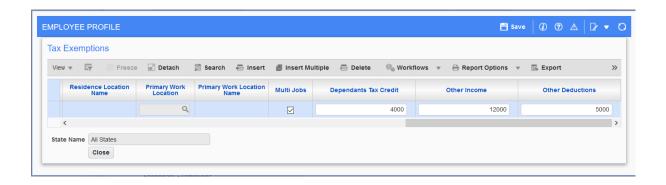
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Line	ii taxabic wa	ges all e	Amount	+ %	of the excess over			
1	Not over	6,200.00	0.00	0.00%	0.00			
2		11,138.00	0.00	10.00%	6,200.00			
3		26,263.00	493.75	12.00%	11,138.00			
4		48,963.00	2,308.75	22.00%	26,263.00			
5		87,850.00	7,302.75	24.00%	48,963.00			
6		109,875.00	16,635.75	32.00%	87,850.00			
7		265,400.00	23,683.75	35.00%	109,875.00			
8	Over	265,400.00	78,117.50	37.00%	265,400.00			

	Married Filing Jointly						
Line	If taxable wages are		Tax is		Of the excess over		
Line			Amount	+ %	Of the excess over		
1	Not over	12,400.00	0.00	0.00%	0.00		
2		22,275.00	0.00	10.00%	12,400.00		
3		52,525.00	987.50	12.00%	22,275.00		
4		97,925.00	4,617.50	22.00%	52,525.00		
5	1	75,700.00	14,605.50	24.00%	97,925.00		
6	2	19,750.00	33,271.50	32.00%	175,700.00		
7	3	23,425.00	47,367.50	35.00%	219,750.00		
8	Over 3	23,425.00	83,653.75	37.00%	323,425.00		

	Head of Household						
Line	If taxable wages are		Tax is		Of the excess over		
Line			Amount	+%	Of the excess over		
1	Not over	9,325.00	0.00	0.00%	0.00		
2		16,375.00	0.00	10.00%	9,325.00		
3		36,175.00	705.00	12.00%	16,375.00		
4		52,075.00	3,081.00	22.00%	36,175.00		
5		90,975.00	6,579.00	24.00%	52,075.00		
6		113,000.00	15,915.00	32.00%	90,975.00		
7		268,525.00	22,963.00	35.00%	113,000.00		
8	Over	268,525.00	77,396.75	37.00%	268,525.00		

Employee Setup





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