

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 taxable wages are	Tax is		Of the excess over
		Amount	+ %	
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
		Amount	+ %	
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
		Amount	+ %	
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	$1,000.00 \times 52 = 52,000.00$
2	Calculate the withholding allowance amount.	Withholding allowance amount	$4 \times 4,300.00 = 17,200.00$
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	$3,150.00 \times 12\% = 378.00$ $378.00 + 1,975.00 = 2,353.00$
6	Divide the annual tax by the number of pay periods.	Pay period tax amount	$2,353.00 / 52 = 45.25$

Employee Setup

EMPLOYEE PROFILE

Table Mode

EMPLOYEE DETAIL

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Report Options

Import

ECM Documents

User Extensions

* Employee

PYUS-W4-01

Henderson Eric

Personal

Company

Rates/Salary

Address

Tax

HR Info

HCM

Exclude Other Hours

Security

Project History

User Defined Fields

* Annual Salary

52,000.00

* Hourly Rate

* Charge Out Rate

* Billing Rate

GC Charge Rate

Gc Billing Rate

* NWHR Rate

REG

Regular

* OT Rate

OT

Overtime

* DOT Rate

DOT

Double Overtime

* OTH Rate

OTHR

Other

EMPLOYEE PROFILE

EMPLOYEE DETAIL

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Workflows

Report Options

Import

ECM Documents

User Extensions

* Employee

PYUS-W4-01

Henderson Eric

Copy Employee

Personal

Company

Rates/Salary

Address

Tax

HR Info

HCM

Exclude Other Hours

Security

Project History

User Defined Fields

* Geo Code

140311840

School District Code

PSD Code

Jurisdiction

Tax Collections

Residential Status

Citizen

* Federal Filing Status

02

Married

State Filing Status

City Filing Status

Primary Exemptions

4

Secondary Exemptions

Primary Exemption Amount

Suppl Exemption Amount

SUI/SDI Location

Non-Residence Certificate

Pension

Deferred Compensation

Exemptions

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EMPLOYEE PROFILE

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ECM Documents

User Extensions

* Employee

PYUS-W4-01

Henderson Eric

Copy Employee

Personal

Company

Rates/Salary

Address

Tax

HR Info

HCM

Exclude Other Hours

Security

Project History

User Defined Fields

Save

Info

Help

Print

Refresh

EMPLOYEE PROFILE

TAX EXEMPTIONS

View

Freeze

Detach

Search

Insert

Insert Multiple

Delete

Workflows

Report Options

Export

ECM Documents

User Extensions

* State	* Work Location	Work Location Name	* Effective Date	Filing Status	Filing Status Description	NR Certificate	Primary Exmp	Secondary Exmp	Tertiary Exmp	Exer Amt
ALL	ALL	All Work Locations	07122019	02	Married	N	4			

State Name

All States

Close

Primary Exemption Amount

Suppl Exemption Amount

SUI/SDI Location

Non-Residence Certificate

Pension

Deferred Compensation

Exemptions

Overrides

EMPLOYEE PROFILE Table Mode

EMPLOYEE DETAIL

Search Insert Delete Previous Next Workflows Report Options Import ECM Documents User Extensions

* Employee PVUS-W4-01 Henderson Eric Copy Employee Notes

Personal

EMPLOYEE PROFILE Save Info Print Refresh

TAX EXEMPTIONS

View Freeze Detach Search Insert Insert Multiple Delete Workflows Report Options Export ECM Documents User Extensions

Location	Primary Work Location	Primary Work Location Name	Multi Jobs	Dependents Tax Credit	Other Income	Other Deductions
			<input type="checkbox"/>			

State Name: All States Close

Primary Exemption Amount:

Suppl Exemption Amount:

SUI/SDI Location:

☒ Non-Residence Certificate
☐ Pension
☐ Deferred Compensation

Exemptions Overrides

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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	$1,750.00 \times 52 = 91,000.00$
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	$82,400.00 - 43,925.00 = 38,475.00$ $38,475.00 \times 22\% = 8,464.50$ $8,464.50 + 4,617.50 = 13,082.00$
4	Divide the annual tax by the number of pay periods.	Pay period tax amount	$13,082.00 / 52 = 251.58$

Employee Setup

EMPLOYEE PROFILE
Table Mode

EMPLOYEE DETAIL

Search Insert Delete Previous Next Workflows Report Options Import ECM Documents User Extensions

* Employee PYU5-W4-02N Hathway Sam

Personal Company **Rates/Salary** Address Tax HR Info HCM Exclude Other Hours Security Project History User Defined Fields

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GC Charge Rate GC Billing Rate
* NWHR Rate REG Regular
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* DOT Rate DOT Double Overtime
* OTH Rate OTHR Other

EMPLOYEE PROFILE

EMPLOYEE DETAIL

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ECM Documents

User Extensions

* Employee

PYUS-W4-02N

Hathway Sam

Personal

Company

Rates/Salary

Address

Tax

HR Info

HCM

Exclude Other Hours

Security

Project History

User Defined Fields

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School District Code

PSD Code

Jurisdiction

Tax Collections

Residential Status

Citizen

* Federal Filing Status

62

Single or Married Filing Separately

State Filing Status

City Filing Status

Primary Exemptions

Secondary Exemptions

Primary Exemption Amount

Suppl Exemption Amount

SUI/SDI Location

☒ Non-Residence Certificate
 ☐ Pension
 ☐ Deferred Compensation

Exemptions

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User Extensions

* Employee

PYUS-W4-02N

Hathway Sam

Copy Employee

Notes

Personal

Company

Rates/Salary

Address

Tax

HR Info

HCM

Exclude Other Hours

Security

Project History

User Defined Fields

TAX EXEMPTIONS

View

Freeze

Detach

Search

Insert

Insert Multiple

Delete

Workflows

Report Options

Export

ECM Documents

User Extensions

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State Name

Close

Primary Exemption Amount

Suppl Exemption Amount

SUI/SDI Location

☒ Non-Residence Certificate
 ☐ Pension
 ☐ Deferred Compensation

Exemptions

Overrides

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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	$2,884.50 \times 52 = 149,994.00$
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. Because the Step 2 (Multiple Jobs) checkbox is selected, the standard deduction is 0 (zero).	Annual taxable wages	$156,994.00 - 0.00 = 156,994.00$
5	Calculate the tax using the Single or Married Filing Separately Step 2 withholding rate schedule.	Annual tax	$156,994.00 - 109,875.00 = 47,119.00$ $47,119.00 \times 35\% = 16,491.65$ $16,491.65 + 23,683.75 = 40,175.40$
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*

Step 2 Checkbox Withholding Rate Schedule				
Single or Married Filing Separately				
Line	If taxable wages are	Tax is		Of the excess over
		Amount	+ %	
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
		Amount	+ %	
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	175,700.00	14,605.50	24.00%	97,925.00
6	219,750.00	33,271.50	32.00%	175,700.00
7	323,425.00	47,367.50	35.00%	219,750.00
8	Over 323,425.00	83,653.75	37.00%	323,425.00

Head of Household				
Line	If taxable wages are	Tax is		Of the excess over
		Amount	+ %	
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

EMPLOYEE PROFILETable Mode

EMPLOYEE DETAIL

Search Insert Delete Previous Next Workflows Report Options Import ECM Documents User Extensions

* Employee PYUS-W4-03N Clark Lisa

PersonalCompanyRates/SalaryAddressTaxHR InfoHCMExclude Other HoursSecurityProject HistoryUser Defined Fields

* Annual Salary149,994.00

* Hourly Rate* Charge Out Rate* Billing Rate

GC Charge RateGc Billing Rate

* NWHR RateREGRegular

* OT RateOTOvertime

* DOT RateDOTDouble Overtime

* OTH RateOTHROther

EMPLOYEE PROFILE

EMPLOYEE DETAIL

Search Insert Delete Previous Next Workflows Report Options Import ECM Documents User Extensions

* Employee PYUS-W4-03N Clark Lisa Copy Employee

PersonalCompanyRates/SalaryAddressTaxHR InfoHCMExclude Other HoursSecurityProject HistoryUser Defined Fields

* Geo Code140891110

School District CodePSD Code

JurisdictionTax Collections

Residential StatusCitizen

* Federal Filing Status62Single or Married Filing Separately

State Filing Status

City Filing Status

Primary Exemptions

Secondary Exemptions

Primary Exemption Amount

Suppl Exemption Amount

SUI/SDI Location

☒ Non-Residence Certificate
☐ Pension
☐ Deferred Compensation

* Exemptions Overrides

EMPLOYEE PROFILE

Table Mode Save

EMPLOYEE DETAIL

Search Insert Delete Previous Next Workflows Report Options Import ECM Documents User Extensions

* Employee PYUS-W4-03N Clark Lisa

Copy Employee

EMPLOYEE PROFILE

Save ? ? ? ? ?

TAX EXEMPTIONS

View Freeze Detach Search Insert Insert Multiple Delete Workflows Report Options Export ECM Documents User Extensions

* State	* Work Location	Work Location Name	* Effective Date	Filing Status	Filing Status Description	NR Certificate	Primary Exmp	Secondary Exmp	Tertiary Exmp	Exer Amt
ALL	ALL	All Work Locations	07122019	62	Single or Married Filing Separately	N				

State Name All States

Close

Primary Exemption Amount

Suppl Exemption Amount

SUI/SDI Location

☒ Non-Residence Certificate
☐ Pension
☐ Deferred Compensation

Exemptions Overrides

EMPLOYEE PROFILE

Table Mode Save

EMPLOYEE DETAIL

Search Insert Delete Previous Next Workflows Report Options Import ECM Documents User Extensions

* Employee PYUS-W4-03N Clark Lisa

Copy Employee

EMPLOYEE PROFILE

Save ? ? ? ? ?

TAX EXEMPTIONS

View Freeze Detach Search Insert Insert Multiple Delete Workflows Report Options Export ECM Documents User Extensions

Location	Primary Work Location	Primary Work Location Name	Multi Jobs	Dependants Tax Credit	Other Income	Other Deductions
			<input checked="" type="checkbox"/>	4000	12000	5000

State Name All States

Close

Primary Exemption Amount

Suppl Exemption Amount

SUI/SDI Location

☒ Non-Residence Certificate
☐ Pension
☐ Deferred Compensation

Exemptions Overrides

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Tax Handler Data for
FED Tax ID 400

Status '0' = Used

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Tax Handler Data for ER
MED (407)

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