

New Hire – Navigating the Tax Information Tab in the Onboarding Wizard

Here are some tips to help you complete the updated Form W4

What would be helpful to gather in advance?

- Recent pay stub(s)
- Recent W-2
- If more than one job or filing jointly with spouse – have information on all income

If you and your spouse hold two or more jobs jointly, the IRS has provided a tax withholding estimator to help you be more accurate with your withholdings.

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

This step by step tool will aid you in determining how much to withhold on your Form W-4 so you do not withhold too much or too little

iSolved also uses a tool to help you calculate additional withholding needed for multiple job. It is much like the multiple job worksheet located on the actual IRS form W-4 which you will have access to in iSolve.

There are five sections on the 2020 Form W-4

- ✓ **Step 1** – Basic personal information and filing Status
- ✓ **Step 2** – Households with multiple jobs – including employee and spouse
- ✓ **Step 3** – Claiming Tax Credits for dependents
- ✓ **Step 4** – Other adjustments (additional income such as interest, dividends and/or any additional tax the employee wants withheld)
- ✓ **Step 5** - Signature

The Employee Withholding Resource Center located under Tax Information in the Onboarding Wizard will guide you through the creation of your Form W-4

The screenshot shows the 'Onboarding Wizard' interface. On the left is a navigation menu with 'Tax Information' selected. The main content area is titled 'Employee Withholding Resource Center' and includes a 'Start' button circled in green. A green callout box points to the 'Start' button with the text: 'If you are ready to begin, click start. If you need more time to gather information, sign out'. Below this, the system has determined applicable sections: 'Federal' and 'Virginia Resident'. A green callout box points to these sections with the text: 'Based on your home and work address, the system determines your tax situation'. At the bottom, there are 'Back' and 'Continue' buttons, with 'Continue' also circled in green.

Choose one and click next

Federal — Survey

Choose one:

- Foreign Earned Income Exclusion — I expect to qualify for the foreign earned income exclusion under either the bona fide residence or physical presence test for calendar year or other tax year
- Nonresident Alien — I am exempt from withholding on compensation for independent (or eligible dependent) personal services of a Nonresident Alien Individual [Instructions for Form 8233](#)
- Quiero continuar en Español
- I want to continue in English

[← Back](#) [Next >](#)

Federal — Summary

Based on answers you provided, we have determined the following **Federal** withholding form(s) may apply to you.

	Locality	Name	Title	Status
Start	Federal	W-4	Employee's Withholding Certificate	Not completed

Federal — Employee's Withholding Certificate — W-4

★ Wizard [Form and Instructions](#)

Check my progress

Nonresident Alien

Are you a nonresident alien?

- Yes
- No

Selecting **Yes** will result in selecting a marital status of **Single** regardless of actual marital status. See [Notice 1392](#) for more details.

Notice: Nonresident aliens may be exempt from wage withholding on part or all of their compensation for dependent personal services under an income tax treaty. If you are claiming a tax treaty withholding exemption, do not complete Form W-4. Instead, complete Form 8233, Exemption from Withholding on Compensation for Independent (and Certain Dependent) Personal Services of a Nonresident Alien Individual, and give it to each withholding agent from whom amounts will be withheld.

[← Back](#) [Next >](#)

Note: There is an access tab available throughout the entire process for the IRS form W-4 and instructions if you need or want them

Select yes or no, then click next

Determine your filing status

★ Wizard [Form and Instructions](#)

Check my progress

Nonresident Alien

Filing Status

Select a filing status

- Single or Married filing separately
- Married Filing Jointly
- Head of Household

[← Back](#) [Next >](#)

Married Filing Jointly also applies to a qualifying widow(er)

Note: New Head of Household Status – check only if you are unmarried and pay more than half the cost of keeping up a home for yourself and a qualifying

Choose one and then click next

★ Wizard Form and Instructions

Check my progress

Nonresident Alien

Filing Status

Exemption

Select one

I want to file this form

I am exempt from 2020 withholding

To be exempt, you must meet the following requirements:

- For 2019, you had no federal income tax liability; **AND**
- For 2020, you expect to have no federal income tax liability.

< Back Next >

Tax rates increase as income rises. If you hold more than one job at a time or are married filing jointly and your spouse also works, these choices will help you determine the correct amount of withholding depending on the income earned from all of these jobs.

★ Wizard Form and Instructions

Check my progress

Nonresident Alien

Filing Status

Exemption

Step 2 Survey

Choose one

I want to use the worksheet to calculate roughly accurate withholding

There are only two jobs total. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld.

None of the above

< Back Next >

This option is if you would like help calculating the additional tax withholding from two or more jobs

This option accounts for the taxes for this job only

This option is if there are only two jobs total and the jobs are of similar pay. If both you and your spouse work that would be considered two jobs.

To account for any dependents

★ Wizard Form and Instructions

Check my progress

Nonresident Alien

Filing Status

Exemption

Step 2 Survey

Dependents survey - Step 3

Would like to claim any dependents?

Yes

No

To qualify for the child tax credit, the child must:

- be under age 17 as of December 31 **AND**
- be your dependent who lives with you for more than half the year **AND**
- have a valid social security number

You also can include **other tax credits**, such as education tax credits and the foreign tax credit.

< Back Next >

If you select yes, you will be redirected to this page

Number of dependents under the age of 17

Number of other dependents

< Back Next >

Nonresident Alien

Filing Status

Exemption

Step 2 Survey

Dependents survey - Step 3

Step 3

Additional adjustments

★ Wizard Form and Instructions

Check my progress

- Nonresident Alien
- Filing Status
- Exemption
- Step 2 Survey
- Dependents survey - Step 3
- Other Adjustments Survey (Optional) - Step 4

Would you like to complete step 4 (Other Adjustments) for other income, deductions, and extra withholding?

Yes

No

◀ Back Next ▶

If you want tax withheld from other income (not jobs) like interest or dividends or deductions other than the standard deductions or any additional amount you may want withheld, select yes and you will be redirected to this page

★ Wizard Form and Instructions

Check my progress

- Nonresident Alien
- Filing Status
- Exemption
- Step 2 Survey
- Dependents survey - Step 3
- Other Adjustments Survey (Optional) - Step 4
- Step 4

4a. If you want tax withheld for other income you expect this year that will not have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income.

\$

4b. Select one

I expect to claim deductions other than the standard deduction and want to reduce your withholding

I will claim the standard deduction

4c. Enter any additional amount you want withheld each pay period

\$

◀ Back Next ▶

If you have additional deductions such as home mortgage interest, charitable contributions, state and local taxes, student loan interest, IRA contributions and/or other adjustments, click here. You will be redirected to the deduction worksheet.

Tax Information

Check my progress

- Nonresident Alien
- Filing Status
- Exemption
- Step 2 Survey
- Dependents survey - Step 3
- Step 3
- Other Adjustments Survey (Optional) - Step 4
- Step 4
- Deductions Worksheet

1. Enter an estimate of your 2020 itemized deductions. Such deductions may include qualifying home mortgage interest, charitable contributions, state and local taxes (up to \$10,000), and medical expenses in excess of 7.5% of your income.

\$

2. Select one

-Select-

- \$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

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".

\$ 0

Note: This is a computed value.

4. Enter an estimate of your student loan interest, IRA, contributions, and certain other adjustments (from Part II of Schedule 1 (Form 1040 or 1040-SR)). See Pub. 955 for more information.

\$

5. Add line 2 and 4. Enter the result here and on line 4b of Form W-4.

\$ 0

Note: This is a computed value.

◀ Back Next ▶

Electronic Signature page. Below the green submit form button is your IRS Form W-4 is filled out for your review.

★ Wizard Form and Instructions

Please review the document below

If you would like to make any changes, you may [return to the previous page](#).

If you would like to submit this form, please agree to the terms below.

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

Please verify the accuracy of your tax forms and electronically sign the documents by entering a PIN. Your PIN is the last four digits of your SSN.

✔ Submit Form

Review, complete, sign and submit