

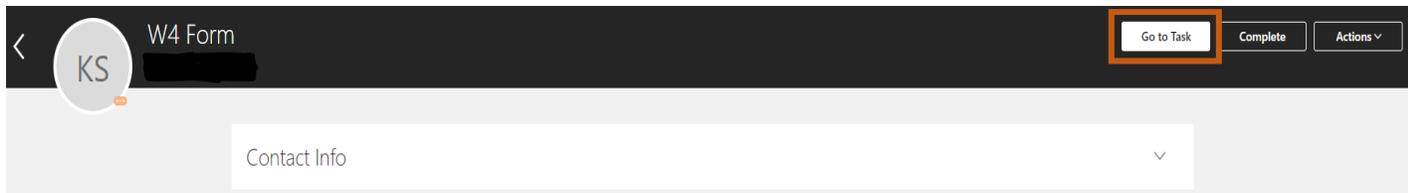
## Tax Withholding Selections in Oracle Cloud

*This directional walk through is meant to aid in navigating the Oracle Cloud tax entry form. If you have questions about what specifically to enter into a field, please consult your tax professional or consult the information from the IRS website.*

IRS FAQs: <https://www.irs.gov/newsroom/faqs-on-the-2020-form-w-4>

### Federal Form

**#1** Click on “Go to Task”



**#2** Click the pencil “edit” button to fill out the federal withholding form

Enter your text here	Filing Status Married filing jointly	
Form Name Federal	Multiple Jobs Yes	
Start Date 01/13/2020	Extra Withholding 0 USD	
	Exempt from Federal Income Tax No	▼

## Employee's Withholding Certificate

OMB No. 1545-0074

▶ **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.**

**2020**

<b>Step 1: Enter Personal Information</b>	(a) First name and middle initial	Last name	(b) Social security number
	Address		▶ 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 <a href="http://www.ssa.gov">www.ssa.gov</a> .
	City or town, state, and ZIP code		
	(c) <input type="checkbox"/> Single or Married filing separately <input type="checkbox"/> Married filing jointly (or Qualifying widow(er)) <input type="checkbox"/> 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.)		

**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.

<b>Step 2: Multiple Jobs or Spouse Works</b>	<p>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 of these jobs.</p> <p>Do <b>only one</b> of the following.</p> <p>(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); <b>or</b></p> <p>(b) Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below for roughly accurate withholding; <b>or</b></p> <p>(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 type="checkbox"/></p> <p><b>TIP:</b> 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.</p>
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**Complete Steps 3-4(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.)

<b>Step 3: Claim Dependents</b>	<p>If your income will be \$200,000 or less (\$400,000 or less if married filing jointly):</p> <p>Multiply the number of qualifying children under age 17 by \$2,000 ▶ \$ _____</p> <p>Multiply the number of other dependents by \$500 . . . . . ▶ \$ _____</p> <p>Add the amounts above and enter the total here . . . . . <b>3</b> \$ _____</p>	
<b>Step 4 (optional): Other Adjustments</b>	<p>(a) <b>Other income (not from jobs).</b> 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 . . . . . <b>4(a)</b> \$ _____</p> <p>(b) <b>Deductions.</b> 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 . . . . . <b>4(b)</b> \$ _____</p> <p>(c) <b>Extra withholding.</b> Enter any additional tax you want withheld each <b>pay period</b> . . . . . <b>4(c)</b> \$ _____</p>	

<b>Step 5: Sign Here</b>	Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.		
	▶ _____ ▶		▶ _____ ▶
	<b>Employee's signature</b> (This form is not valid unless you sign it.)		<b>Date</b>

<b>Employers Only</b>	Employer's name and address	First date of employment	Employer identification number (EIN)
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## Corresponding Boxes in Oracle Cloud to IRS W-4 Form

**Step 1:** ( C ) is selected in the drop down menu under filing status

Form Name  
Federal

\*When does this change start?  
02/05/2020

Filing Status  
[Dropdown menu]

Multiple Jobs

**Step 2:** This value is selected under the multiple jobs drop down menu.

[Dropdown menu]

Multiple Jobs  
[Dropdown menu]

Extra Withholding

**Step 3:** These value are entered in the Qualifying Dependents Amount, Other Dependents Amount, and then totaled in the Total Dependents Amount (the black star)

Qualifying Dependents Amount  
[Input field] 0 USD

Other Dependents Amount  
[Input field] 0 USD

★ Total Dependents Amount  
[Input field] 0 USD

**Step 4:** These values are entered under other income, deductions, and extra with holdings.

Multiple Jobs  
[Dropdown menu]

Extra Withholding  
[Input field] 0 USD

Other Income Amount  
[Input field] 0 USD

Deductions Amount  
[Input field] 0 USD

**Step 5:** This step is completed by checking the “I Agree” box at the end of the federal form once you have completed your selections.

\*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.

I Agree

#3 Click "Save"

## State Form

#1 Click "+Add" to complete the appropriate state form

The screenshot shows the 'Tax Withholding' form for the 'University of Wisconsin Hospitals and Clinics Authority'. The form includes a header with a back arrow, a user profile icon with 'KS', and the title 'Tax Withholding'. The main content area has a text input field with the placeholder 'Enter your text here'. Below this are three fields: 'Form Name' (Federal), 'Start Date' (2/18/20), 'Filing Status' (Multiple Jobs), 'Extra Withholding' (0 USD), and 'Exempt from Federal Income Tax' (No). A red box highlights the '+ Add' button in the top right corner.

#2 Select the appropriate state from the "What form would you like to add?" dropdown

This screenshot shows the 'Tax Withholding' form with a modal overlay. The modal contains a text input field with the placeholder 'Enter your text here', a date picker set to '2/18/20', and a dropdown menu labeled 'What form would you like to add?'. Below the date picker is a declaration: '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.' with an 'I Agree' checkbox. At the bottom of the modal are 'Save' and 'Cancel' buttons. The background form is partially visible, showing the same fields as the previous screenshot. A red box highlights the 'What form would you like to add?' dropdown menu.

#3 Complete the remaining fields and select "Save"

#4 Click the back arrow to return to the page with all your new hire tasks. Click on the W4 task to mark the task as "complete"

