

Swarthmore College



Electronic W-4 Form Creation, Update and Printing Instructions

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Overview

In the interest of sustainability, Swarthmore College requires employees to create and update their W-4 form electronically via mySwarthmore. Paper forms are no longer used, unless you are an international student.

The following instructions are applicable to faculty, staff and students. They are segregated by the following categories:

- (1) Current employees (i.e., you currently are working for Swarthmore College)
- (2) New employees (i.e., you have never worked for Swarthmore College)
- (3) Re-hired employees (i.e., you previously held a position at Swarthmore College)

Current Employee Instructions

The following process should be followed after successfully logging in to mySwarthmore to print or update your W-4:

- 1) Select the link for the Employee Main Menu

mySwarthmore

[Personal Information](#) [Employee](#)

[SITE MAP](#) | [HELP](#) | [EXIT](#)

Personal Information Main Menu

View and update your departmental and home address(es) and phone number(s). Update your directory information for the Swarthmore College online directory. View name change and social security number change information. Change your PIN.

Employee Main Menu

Benefits, leave data, paystubs, W2 form, W4 data, Timesheets, Electronic Personnel Action Forms (EPAFs).

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- 2) Select the link for Tax Forms

Employee Main Menu

Every effort has been made to provide the most accurate, up-to-date information. In the event this information appears incomplete or requires updating, contact humanresources@swarthmore.edu or stop by the main office in Pearson, Room 110. The College will not be held responsible for problems or damages that arise from reliance on this website's material.

Benefits and Deductions

View your retirement plans, health insurance information, flex spending accounts and miscellaneous deductions.

Pay Information

View your Direct Deposit information; View your Earnings and Deductions History; View your Pay Stubs.

Tax Forms

Provide Electronic Consent; View your W-4 information; View/print your W-2 form; View/print your 1095-C form.

Attendance Enterprise Employee Self-Service Login

Track your time electronically through Attendance Enterprise Employee Self-Service. **(Requires VPN from off-campus)**

Sick and Vacation Balances and History

Leave Lookup for Supervisors

Time Sheet - Submit or Approve

Submit/Approve Time Sheet

Salary Letter

Annual Notices and Disclosures

Annual Notices and Disclosures

Request a Parking Permit

Enter your vehicle information to request a parking permit from Public Safety

Swat e-Forms and Personal e-Docs

Swat e-Forms and Personal e-Docs

Employee Profile

Employee Profile

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3) Select the link for W-4 Tax Exemptions/Allowances

mySwarthmore

Personal Information Employee **Worth Health Center**

RETURN TO MENU | HELP | EXIT

Electronic Consent
W-4 Tax Exemptions/Allowances
W-2 Year End Earnings Statement
1095-C Employer-Provided Health Insurance Offer and Coverage Statement

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4) The W-4 Tax Exemptions/Allowance page is displayed with your current W-4 information as of today's date.

mySwarthmore


Personal Information Employee

Search

RETURN TO MENU | SITE MAP | HELP | EXIT

W-4 Tax Exemptions/Allowances

Your W-4 information determines the amount of Federal Tax that is withheld from your pay. The information below is shown as of today. The Start Date typically is reflective of your first day worked at Swarthmore. If you were re-hired, the date would be reflective of your first day worked in your original job. If you were hired prior to 1999, the start date is as of the inception of the Banner Human Resources.

 If you made changes that take effect in the future, select the History link to see a complete list of all changes you have made in the past or future.

It is recommended that you evaluate your federal withholding before making any changes by accessing the IRS Withholding Calculator using the link below.

Federal Withholding Tax

As of Date:	Dec 08, 2017
Name:	Roger Federer
Address:	19 Slams Grand Champ Way Bronx NY 10451

Last Name differs from SSN card: No

Deduction Status:	Active
Start Date:	Oct 01, 2017
End Date:	
Filing Status:	Single
Number of Allowances:	0
Additional Withholding:	.00

Note: Additional amount, if any, you want withheld from each paycheck.

- 5) If you wish to print your current W-4, select the Print button. Use your browser's print function to print your W-4 form. When finished select the Go Back link to return to the prior page.

Form W-4 Department of the Treasury Internal Revenue Service		Employee's Withholding Allowance Certificate Whether you are entitled to claim a certain number of allowances or exemption from withholding is subject to review by the IRS. Your employer may be requested to send a copy of this form to IRS.		2017	
1 Your first name and middle initial Roger		Last name Federer		2 Your social security number 654-78-9321	
Home address (number and street or rural route) 19 Slams Grand Champ Way		3 <input checked="" type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Married, but withhold at higher Single rate. Note. if married, but legally separated, or spouse is a nonresident alien, check the "Single" box			
City or town, state, and ZIP code Bronx NY 10451		4 If your last name differs from that shown on your social security card, check here. You must call 1-800-772-1213 for a replacement card. <input type="checkbox"/>			
5 Total number of allowances you are claiming (from line H above or from the applicable worksheet on page 2)				5 0	
6 Additional amount, if any, you want withheld from each paycheck				6 \$	
7 I claim exemption from withholding for 2017, and I certify that I meet both of the following conditions for exemption. Last year I had a right to a refund of all federal income tax withheld because I had no tax liability and This year I expect a refund of all federal income tax withheld because I expect to have no tax liability. If you meet both conditions, write "Exempt" here					
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.					
Employee's signature <small>(This form is not valid unless you sign it.)</small>					
Date >					
8 Employer's name and address (Employer: Complete lines 8 and 10 only if sending to the IRS.) Swarthmore College 500 College Avenue Swarthmore PA 19081			9 Office code (optional)		10 Employer identification number (EIN) 231352683

[Go Back](#)

- 6) To change your W-4 information:
- Select the Update link near the center, bottom of the page.
 - The Update W-4 Information page will be displayed.
 - For existing employees, you can select the effective date of the change, but it must be a date after your last paid date. The Effective Date will automatically default to the day after the date on which you were last paid.
 - Make any other changes on this page as desired.
 - Select the Certify Changes button.

Caution: If you change your deduction status to Exempt, you must meet the eligibility requirements as stated. You will not have federal taxes withheld from your paycheck. You may be liable additional taxes and IRS penalties as a result. Contact the Payroll office if you have any questions regarding use of this status.

Note: At any time before you successfully certify your changes, you can select the Restore Original Values button and the page will reset all data.

Update W-4 Information

Enter your desired changes and click the Certify Changes button. By checking the Certify Changes button, you are under penalty of perjury if the information submitted is not true and valid. If you wish to undo your changes, click the Restore Original Values button.

The information displayed is based on the Deduction Effective as of: date, which is today's date.



New Employees: For the Effective Date of Change, return to the W-4 Tax Exemptions/Allowance page and note the Start Date. If you have not already been paid, you should enter this date in the Effective Date of Change field.

Active Employees: If you have previously been paid, the date that you were last paid will be shown in the Note with the Effective Date of Change field. You must enter a date that is at least one day after your last date paid. You can enter any date in the future, noting your federal withholding will change in the pay period that contains that date. If the Delete box is visible at the bottom of the page, you can delete your change by checking the box and clicking the Submit Changes button.

* - Indicates a required field.

Federal Withholding Tax

Deduction Effective as of: Dec 01, 2017

If your last name differs from that shown on your Social Security Card, check here. ☐
Note: You must contact Social Security Administrator for a replacement card.

Effective Date of Change MM/DD/YYYY:*

Note: Effective Date must be after Nov 30, 2017 the date you were last paid. 12/01/2017

Deduction Status:*

Active ▼

I claim exemption from withholding for the tax year specified, and I certify that I meet both of the following conditions for exemption.

- * Last year I had a right to a refund of all federal income tax withheld because I had no tax liability and
 - * This year I expect a refund of all federal income tax withheld because I expect to have no tax liability.
- If you meet both conditions, select "Exempt" in Deduction Status field.

Filing Status: * Single ▼

Number of Allowances 99 : * 0

Additional Withholding 999999.99 :

Note: Additional amount, if any, you want withheld from each paycheck.

- 7) When you select Certify Changes, you will be presented with the W-4 Certification page. Enter your **network password** as your PIN and select Submit to sign off on your changes. An electronic audit of the person making the change will be kept on file.

FileEditViewHistoryBookmarksToolsHelp

The Dash : Swarthmo...Banner/W-4" - cstack...Swarthmore.edu - Cal...Oracle Fusion Middleware...Account ResetOracle Fusion Middleware...W-4 Certification

https://testmyswat.swarthmore.edu/test/bwpkdupdP_UpdateDednProcess

ITSVerify Java VersionQualys BrowserCheckGoogle

mySwarthmore

Personal InformationEmployeeWorth Health Center

HELPEXIT

W-4 Certification

Enter your PIN and select Submit if you agree with the statement below. Otherwise, select a link and your W-4 changes will not be submitted.

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.

PIN:

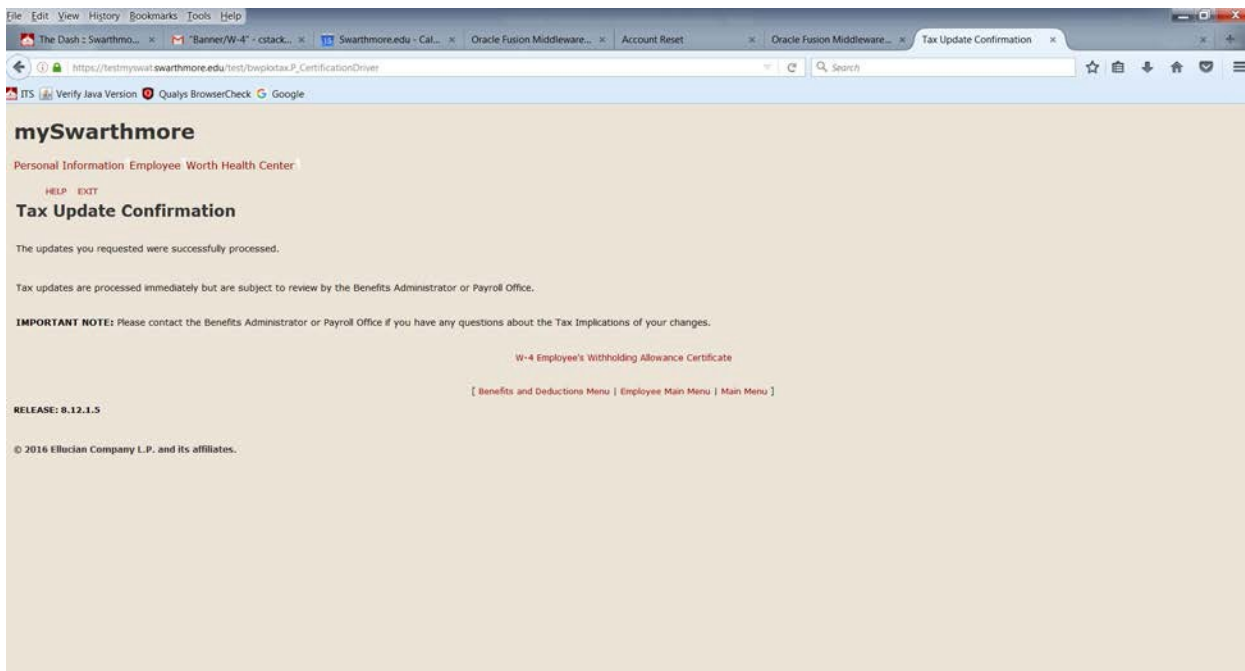
Submit

W-4 Employee's Withholding Allowance Certificate

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8) If your changes are successfully processed, you will be presented with the following page:



9) You may select the W-4 Employee's Withholding Allowance Certificate link near the bottom of the page to return to the W-4 Tax Exemptions/Allowance page to verify that your changes were processed.

W-4 Tax Exemptions/Allowances

Your W-4 information determines the amount of Federal Tax that is withheld from your pay. The information below is shown as of today. The Start Date typically is reflective of your first day worked at Swarthmore. If you were re-hired, the date would be reflective of your first day worked in your original job. If you were hired prior to 1999, the start date is as of the inception of the Banner Human Resources.



If you made changes that take effect in the future, select the History link to see a complete list of all changes you have made in the past or future.

It is recommended that you evaluate your federal withholding before making any changes by accessing the IRS Withholding Calculator using the link below.

Federal Withholding Tax

As of Date: Dec 08, 2017
Name: Roger Federer
Address: 19 Slams Grand Champ Way
Bronx NY 10451

Last Name differs from SSN card: No

Deduction Status: Active
Start Date: Oct 01, 2017
End Date:
Filing Status: Single

Number of Allowances: 3
Additional Withholding: .00

Note: Additional amount, if any, you want withheld from each paycheck.

[Print](#)

Note: You will not see changes if they take effect in the future; this page shows your information as of today. If you wish to view all of your W-4 information both past and future, select the History link at the bottom of the page.

New Employee Instructions

1. Follow steps 1-4 above for Active Employees
2. At step #4, the W-4 Tax Exemptions/Allowances page will show a Filing Status of Single and Number of Allowances as zero. Single and zero are the default values as mandated by the IRS for an employee who has not filed a W-4 with their employer. If these values are correct for you, you do not need to make any changes. You can simply exit the page.

mySwarthmore


Personal Information Employee

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W-4 Tax Exemptions/Allowances

Your W-4 information determines the amount of Federal Tax that is withheld from your pay. The information below is shown as of today. The Start Date typically is reflective of your first day worked at Swarthmore. If you were re-hired, the date would be reflective of your first day worked in your original job. If you were hired prior to 1999, the start date is as of the inception of the Banner Human Resources.

 If you made changes that take effect in the future, select the History link to see a complete list of all changes you have made in the past or future.

It is recommended that you evaluate your federal withholding before making any changes by accessing the IRS Withholding Calculator using the link below.

Federal Withholding Tax

As of Date:	Dec 08, 2017
Name:	Roger Federer
Address:	19 Slams Grand Champ Way Bronx NY 10451

Last Name differs from SSN card: No

Deduction Status:	Active
Start Date:	Oct 01, 2017
End Date:	
Filing Status:	Single
Number of Allowances:	0
Additional Withholding:	.00

Note: Additional amount, if any, you want withheld from each paycheck.

3. As a new employee, if you wish to update your W-4 information, take note of the Start Date. This typically will be your first day of work. The As of Date displayed is today's date and it is reflective of the fact that the information you are viewing is as of today's date.

Next, select the Update link at the bottom, center of the page. The Update W-4 Information page will be displayed:

Update W-4 Information

Enter your desired changes and click the Certify Changes button. By checking the Certify Changes button, you are under penalty of perjury if the information submitted is not true and valid. If you wish to undo your changes, click the Restore Original Values button.

The information displayed is based on the Deduction Effective as of: date, which is today's date.



New Employees: For the Effective Date of Change, return to the W-4 Tax Exemptions/Allowance page and note the Start Date. If you have not already been paid, you should enter this date in the Effective Date of Change field.

Active Employees: If you have previously been paid, the date that you were last paid will be shown in the Note with the Effective Date of Change field. You must enter a date that is at least one day after your last date paid. You can enter any date in the future, noting your federal withholding will change in the pay period that contains that date. If the Delete box is visible at the bottom of the page, you can delete your change by checking the box and clicking the Submit Changes button.

* - Indicates a required field.

Federal Withholding Tax

Deduction Effective as of:

Dec 01, 2017

If your last name differs from that shown on your Social Security Card, check here. ☐

Note: You must contact Social Security Administrator for a replacement card.

Effective Date of Change MM/DD/YYYY:*

12/01/2017

Note: Effective Date must be after Nov 30, 2017 the date you were last paid.

Deduction Status:*

Active

I claim exemption from withholding for the tax year specified, and I certify that I meet both of the following conditions for exemption.

4. Enter the Start Date that you noted in the previous step (step #3) in the Effective Date of Change.

Note: Typically, the Effective Date of Change is your first day of work. Ignore the statement regarding the Effective Date must be after the date you were last paid (as you have not been paid at this point).

Caution: If the Effective Date of Change is a date in the future, you will be taxed at the Single with zero exemption rate until that date.

5. Update the Deduction Status, Filing Status, Number of Allowances and Additional Withholding fields as desired.

Caution: If you change your deduction status to Exempt, you must meet the eligibility requirements as stated. You will not have federal taxes withheld from your paycheck. You may be liable additional taxes and IRS penalties as a result. Contact the Payroll office if you have any questions regarding use of this status.

6. Select the Certify Changes button.

Note: Select the Restore Original Values button if you do not want to save your changes.

7. When you select **Certify Changes**, you will be presented with the **W-4 Certification** page. Enter your **network password** as your PIN and select **Submit** to sign off on your changes. An electronic audit of the person making the change will be kept on file.

The screenshot shows a web browser window with the URL https://testmyswat.swarthmore.edu/test/bwplupdp_UpdateDednProcess. The page is titled "mySwarthmore" and has a navigation bar with links: "Personal Information", "Employee", "Worth Health Center", "HELP", and "EXIT". The main heading is "W-4 Certification". Below the heading, there is a message: "Enter your PIN and select Submit if you agree with the statement below. Otherwise, select a link and your W-4 changes will not be submitted." Underneath, it says: "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." There is a "PIN:" label followed by a text input field and a "Submit" button. At the bottom of the page, it says "RELEASE: 8.12.1.5" and "© 2016 Ellucian Company L.P. and its affiliates."

8. If your changes are successfully processed, you will be presented with the following page:

The screenshot shows a web browser window with the URL https://testmyswat.swarthmore.edu/test/bwpltax_P_CertificationDriver. The page is titled "mySwarthmore" and has a navigation bar with links: "Personal Information", "Employee", "Worth Health Center", "HELP", and "EXIT". The main heading is "Tax Update Confirmation". Below the heading, there is a message: "The updates you requested were successfully processed." Underneath, it says: "Tax updates are processed immediately but are subject to review by the Benefits Administrator or Payroll Office." There is an "IMPORTANT NOTE" section: "Please contact the Benefits Administrator or Payroll Office if you have any questions about the Tax Implications of your changes." At the bottom of the page, it says "RELEASE: 8.12.1.5" and "© 2016 Ellucian Company L.P. and its affiliates."

9. You may select the **W-4 Employee's Withholding Allowance Certificate** link near the bottom of the page to return to the **W-4 Tax Exemptions/Allowance** page to verify that your changes were processed.

W-4 Tax Exemptions/Allowances

Your W-4 information determines the amount of Federal Tax that is withheld from your pay. The information below is shown as of today. The Start Date typically is reflective of your first day worked at Swarthmore. If you were re-hired, the date would be reflective of your first day worked in your original job. If you were hired prior to 1999, the start date is as of the inception of the Banner Human Resources.



If you made changes that take effect in the future, select the History link to see a complete list of all changes you have made in the past or future.

It is recommended that you evaluate your federal withholding before making any changes by accessing the IRS Withholding Calculator using the link below.

Federal Withholding Tax

As of Date: Dec 08, 2017
Name: Roger Federer
Address: 19 Slams Grand Champ Way
Bronx NY 10451

Last Name differs from SSN card: No

Deduction Status: Active
Start Date: Oct 01, 2017

End Date:
Filing Status: Single

Number of Allowances: 3
Additional Withholding: .00

Note: Additional amount, if any, you want withheld from each paycheck.

[Print](#)

Note: You will not see changes if they take effect in the future; this page shows your information as of today. If you wish to view all of your W-4 information both past and future, select the History link at the bottom of the page. Use the Print button if you wish to print a copy of your W-4 form for your records.

Re-Hired Employee Instructions

1. Follow steps 1-4 above for Active Employees
2. At step #4, the W-4 Tax Exemptions/Allowances page will show the Filing Status and Number of Allowances that you had when you last worked for Swarthmore College. The values displayed are as of today's date (As of Date). If these values are correct for you, you do not need to make any changes. You can simply exit the page.

mySwarthmore


Personal Information Employee

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W-4 Tax Exemptions/Allowances

Your W-4 Information determines the amount of Federal Tax that is withheld from your pay. The information below is shown as of today. The Start Date typically is reflective of your first day worked at Swarthmore. If you were re-hired, the date would be reflective of your first day worked in your original job. If you were hired prior to 1999, the start date is as of the inception of the Banner Human Resources.

 If you made changes that take effect in the future, select the History link to see a complete list of all changes you have made in the past or future.

It is recommended that you evaluate your federal withholding before making any changes by accessing the [IRS Withholding Calculator](#) using the link below.

Federal Withholding Tax

As of Date:	Dec 08, 2017
Name:	Roger Federer
Address:	19 Slams Grand Champ Way Bronx NY 10451

Last Name differs from SSN card: No

Deduction Status:	Active
Start Date:	Oct 01, 2017
End Date:	
Filing Status:	Single
Number of Allowances:	0
Additional Withholding:	.00

Note: Additional amount, if any, you want withheld from each paycheck.

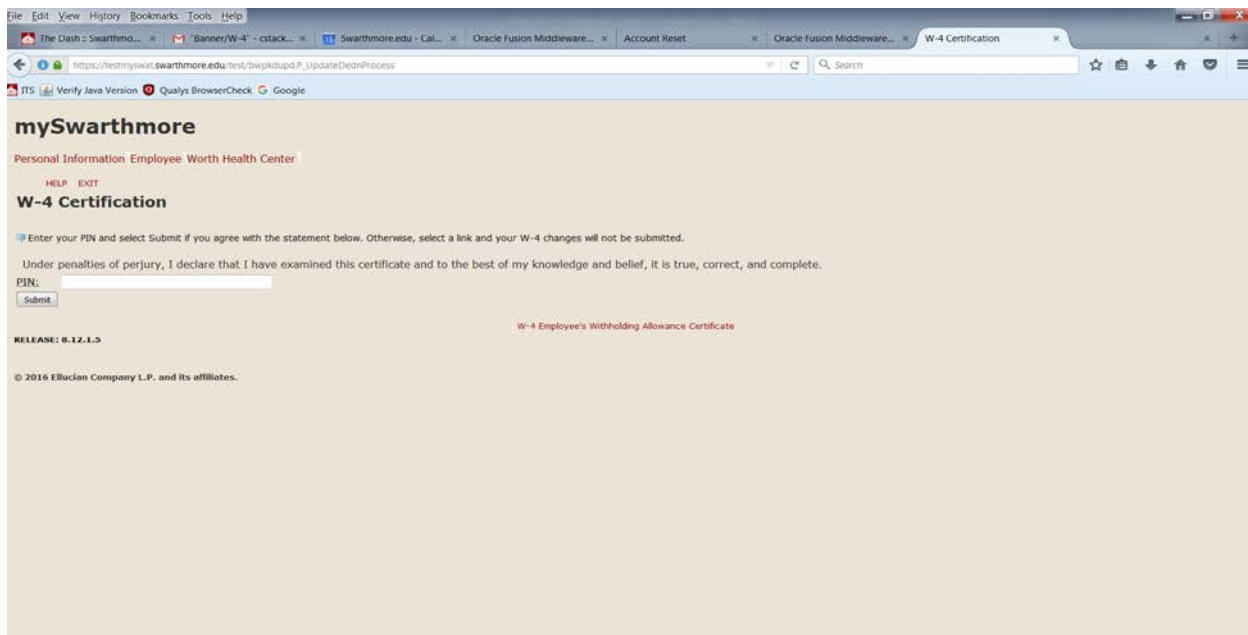
3. As a re-hired employee, if you wish to update your W-4 information, select the Update link at the bottom, center of the page. The Update W-4 Information page will be displayed:

4. The Effective Date will automatically default to the day after the date on which you were last paid. As this date could be some time in the past, you should change this date to your new start date (i.e., the date you are returning to work for Swarthmore College).
5. Update the Deduction Status, Filing Status, Number of Allowances and Additional Withholding fields as desired.

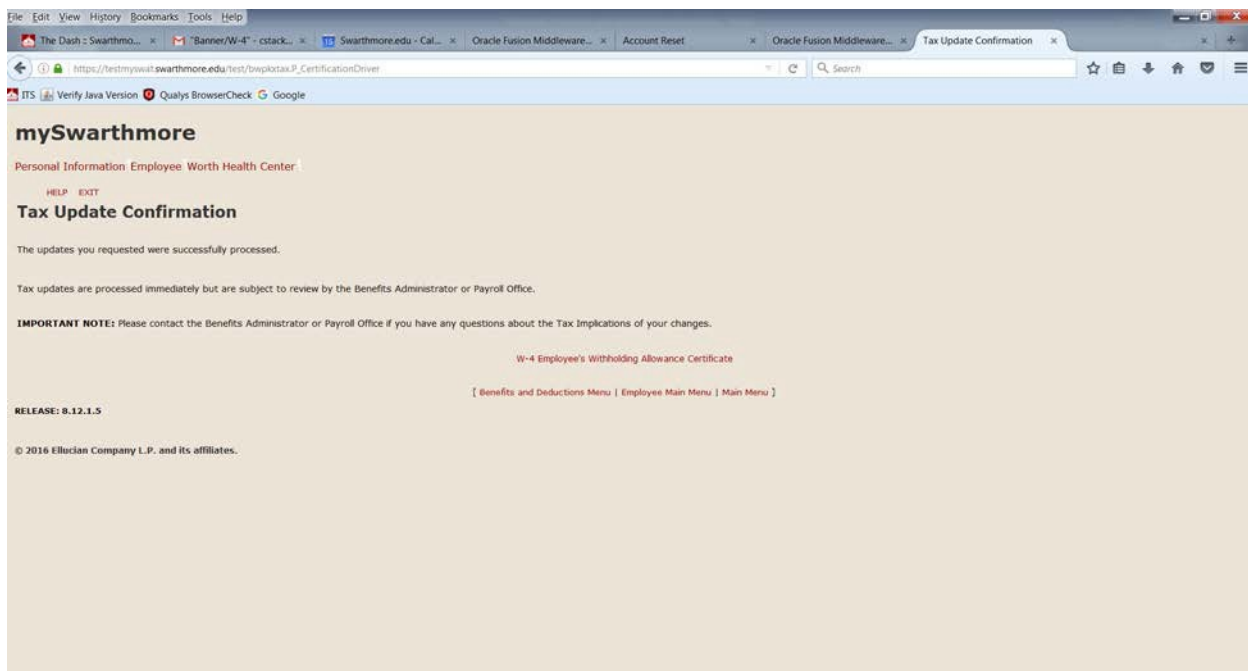
Caution: If you change your deduction status to Exempt, you must meet the eligibility requirements as stated. You will not have federal taxes withheld from your paycheck. You may be liable additional taxes and IRS penalties as a result. Contact the Payroll office if you have any questions regarding use of this status.

6. Select the Certify Changes button.

Note: Select the Restore Original Values button if you do not want to save your changes. When you select Certify Changes, you will be presented with the W-4 Certification page. Enter your **network password** as your PIN and select Submit to sign off on your changes. An electronic audit of the person making the change will be kept on file.



7. If your changes are successfully processed, you will be presented with the following page:



You may select the W-4 Employee's Withholding Allowance Certificate link near the bottom of the page to return to the W-4 Tax Exemptions/Allowance page to verify that your changes were processed.

W-4 Tax Exemptions/Allowances

Your W-4 information determines the amount of Federal Tax that is withheld from your pay. The information below is shown as of today. The Start Date typically is reflective of your first day worked at Swarthmore. If you were re-hired, the date would be reflective of your first day worked in your original job. If you were hired prior to 1999, the start date is as of the inception of the Banner Human Resources.



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Deduction Status: Active
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End Date:
Filing Status: Single

Number of Allowances: 3
Additional Withholding: .00

Note: Additional amount, if any, you want withheld from each paycheck.

[Print](#)

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