

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.

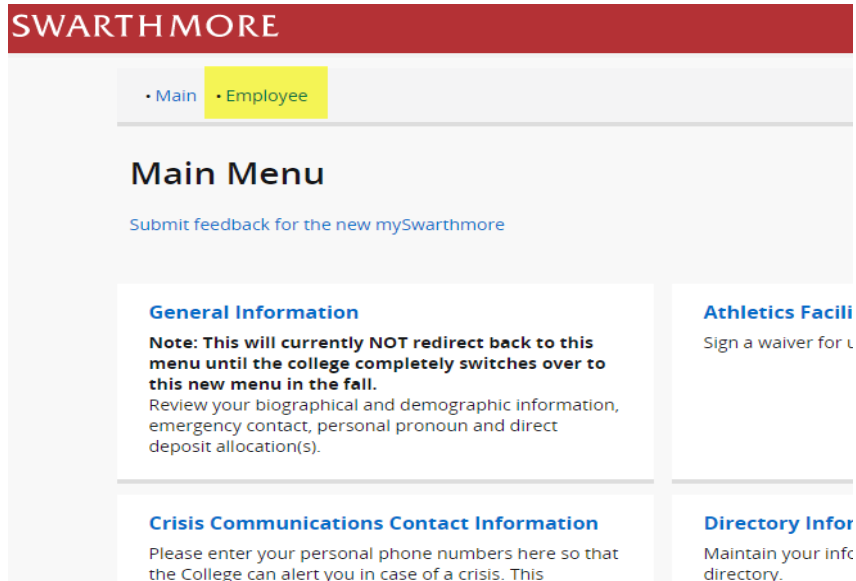
The following instructions are applicable to faculty, staff and students. They are segregated by the following categories:

- (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:

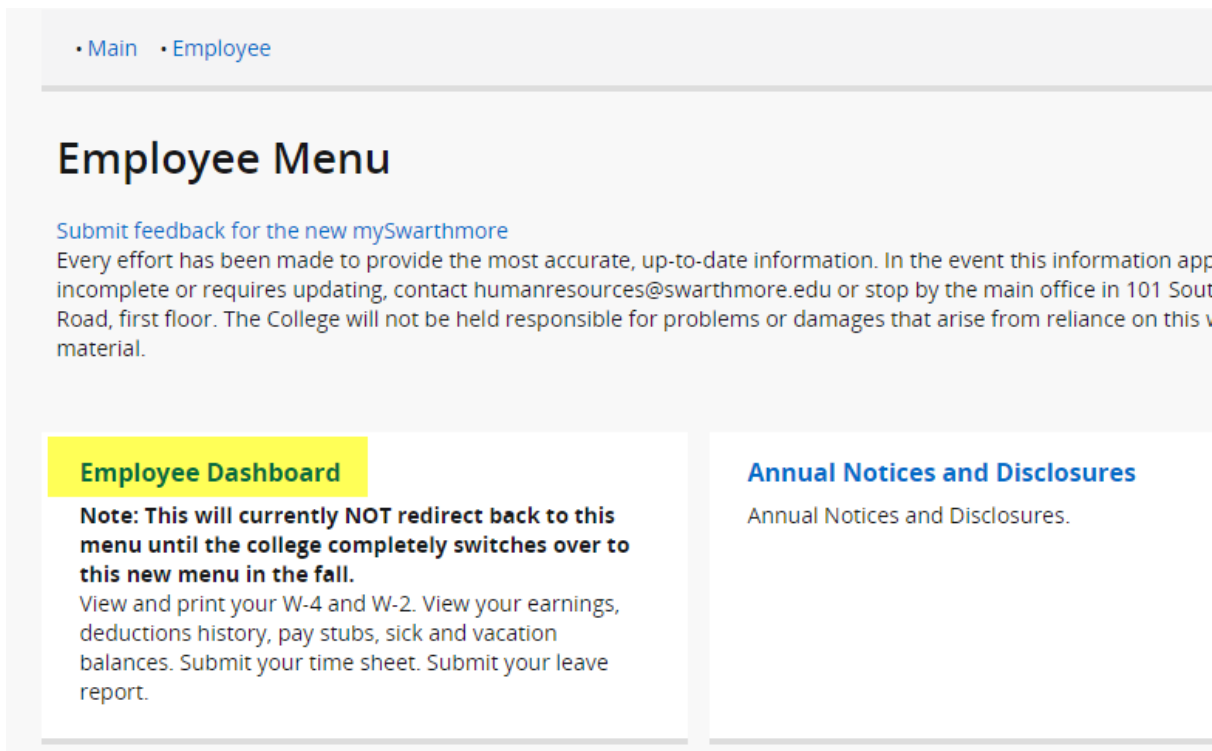
- 1) Select the link for the Employee Main Menu



The screenshot shows the top navigation bar with "SWARTHMORE" in a red header. Below it, a breadcrumb trail shows "Main" and "Employee" (highlighted in yellow). The main heading is "Main Menu" with a link to "Submit feedback for the new mySwarthmore". The page is divided into four columns:

- General Information:** A note states: "Note: This will currently NOT redirect back to this menu until the college completely switches over to this new menu in the fall." Below the note, it says: "Review your biographical and demographic information, emergency contact, personal pronoun and direct deposit allocation(s)." The "Employee" link in the breadcrumb is highlighted in yellow.
- Athletics Facili:** A link labeled "Athletics Facili" with the text "Sign a waiver for L" below it.
- Crisis Communications Contact Information:** Text: "Please enter your personal phone numbers here so that the College can alert you in case of a crisis. This".
- Directory Infor:** A link labeled "Directory Infor" with the text "Maintain your info directory." below it.

- 2) Select the link for Employee Dashboard



The screenshot shows the top navigation bar with "SWARTHMORE" in a red header. Below it, a breadcrumb trail shows "Main" and "Employee" (highlighted in yellow). The main heading is "Employee Menu" with a link to "Submit feedback for the new mySwarthmore". Below the heading, a paragraph reads: "Every effort has been made to provide the most accurate, up-to-date information. In the event this information app incomplete or requires updating, contact humanresources@swarthmore.edu or stop by the main office in 101 Sout Road, first floor. The College will not be held responsible for problems or damages that arise from reliance on this v material." The page is divided into two columns:

- Employee Dashboard:** A note states: "Note: This will currently NOT redirect back to this menu until the college completely switches over to this new menu in the fall." Below the note, it says: "View and print your W-4 and W-2. View your earnings, deductions history, pay stubs, sick and vacation balances. Submit your time sheet. Submit your leave report." The "Employee" link in the breadcrumb is highlighted in yellow.
- Annual Notices and Disclosures:** A link labeled "Annual Notices and Disclosures" with the text "Annual Notices and Disclosures." below it.

- 3) Expand the 'Taxes' section, and select the link for W-4 Employee's Withholding Allowance Certificate.

The screenshot shows the SWARTHMORE Employee Dashboard. At the top, there is a red header with the word "SWARTHMORE" in white. Below it is a blue link for "Employee Dashboard". The main heading is "Employee Dashboard". On the left, there is a "My Profile" button. On the right, under "Leave Balances as of 08/04/2022", there are two cards: "Vacation Time in hours" with a value of 51.32 and "Sick Time in hours" with a value of 21.0. Below this is a "Pay Information" dropdown menu. The "Taxes" section is expanded, showing a list of tax-related links. The link "W-4 Employee's Withholding Allowance Certificate" is highlighted in yellow. Other links include "W-2 Wage and Tax Statement", "Electronic Regulatory Consent", "W-2c Corrected Wage and Tax Statement", and "1095-C Employer Provided Health Insurance Offer and Coverage Statement". Below the "Taxes" section, there are details for "Federal Withholding Tax" and "Pennsylvania State Tax".

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

The screenshot shows the "W-4 Employee's Withholding Allowance Certificate" page. The title is "W-4 Employee's Withholding Allowance Certificate". Under the "Federal Tax" section, the following information is displayed:

As of Date:	08/04/2022
Name:	[Redacted]
Address:	[Redacted]
Last Name differs from SSN card:	No
Deduction Status:	Active
Start Date:	03/28/2022
End Date:	
Filing Status	Married Filing Jointly
Nonresident Alien	No
Step 2C Indicator	No
Dependent Amount	2,000.00
Other Income	0.00
Deductions	0.00
Additional Withholding	200.00

Note: Extra Withholding. Enter any additional tax you want withheld each pay period.

At the bottom left, there is a "Print" button. At the bottom right, there are links for "History", "Update", "Contributions or Deductions", and "Vendor Web Site".

- 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		Employee's Withholding Certificate		OMB No. 1545-0047
Department of the Treasury Internal Revenue Service 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.				
(a) First name and middle initial Last name		(b) Social security number		2022 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 www.ssa.gov.
Address				
Step 1: Enter Personal Information (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 through 4 ONLY if they apply to you. To see if you are exempt from withholding or if you have concerns about your process, see page 2. Everyone must complete Step 5. See instructions on page 2.				
Step 2: Multiple Jobs or Spouse Work 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. Do only one of the following: (a) Use the estimator at www.irs.gov/W4App for most accurate withholding; OR (b) Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below for roughly accurate withholding; OR (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.				
CAUTION: If you have privacy concerns, choose (a) or (b). If you and/or your spouse have income from self-employment, including as an independent contractor, choose (a).				
Complete Steps 3 through 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 through 4(b) on the Form W-4 for the highest paying job.)				
Step 3: Claim Dependents If your income will be \$200,000 or less (\$400,000 or less if married filing jointly): Multiply the number of qualifying children under age 17 by \$2,000 Multiply the number of other dependents by \$500.				
Add the amounts above and enter the total here:			3	\$ 2,000.00
Step 4: (optional) Other Adjustment (a) Other Income. If you want tax withheld for other income you expect this year that isn't here with withholding, enter the amount of other income here. This may include interest, dividends, and retirement income. You should not include income from any jobs. (b) Deductions. 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. (c) Extra withholding. Enter any additional tax you want withheld each pay period.				
			4(a)	\$
			4(b)	\$
			4(c)	\$ 200.00
Step 5: Sign Here Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.				
Employee's signature (This form is not valid unless you sign it.)			30/Mar/2022	
Date				
Employers Only Employer's name and address: Squankome College, 500 College Avenue, Squankome, NJ, 07885 First date of employment: 23/152683 Employer identification number (EIN): 23152683				

- 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.

Deductions 0.00
 Additional Withholding 200.00

Note: Extra Withholding. Enter any additional tax you want withheld each pay period.

Print

History • **Update** • Contributions or Deductions • Vendor Web Site

W2 Year End Earnings Statement

SWARTHMORE Miller, Rog

[Employee Dashboard](#) » [Update W-4](#)

Update W-4

Review [Form W-4 2020](#) for required information on completing a new form W-4. Once you have made changes you will be required to certify those changes by clicking on **Certify Changes** and then clicking on **OK** in the pop up window. If the delete option is available select the check box then click on **Certify Changes** to remove the record.

* - indicates a required field.

Federal Tax

Deduction Effective as of: 09/01/2022

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

Note: See Form W-4 instructions.

Effective Date of Change MM/DD/YYYY: * 09/01/2022

Note: Effective Date must be after 08/31/2022 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.

* Last year I had no tax liability and

* This year I expect to have no tax liability. If you meet both conditions, select "Exempt" in Deduction Status field.

Filing Status: *

[Employee Dashboard](#) » [Update W-4](#)

Nonresident Alien

Step 2C Indicator

Dependents Under 17 999999.99 :

Multiply the number of qualifying children under age 17 by \$2,000.

Other Dependents 999999.99 :

Multiply the number of other dependents by \$500.

Dependent Amount 999999.99 :

Step 3: Add the amounts above and enter the total here.

Other Income 999999.99 :

Step 4a) See Form W-4 instructions.

Deductions 999999.99 :

Step 4b) See Form W-4 instructions.

Additional Withholding 999999.99 :

Step 4c) Extra Withholding. Enter any additional tax you want withheld each pay period.

- 7) When you select **Certify Changes**, you will be presented with a declaration of accuracy statement. An electronic audit of the person making the change will be kept on file.

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.

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

SWARTHMORE Settings User

[Employee Dashboard](#) » [Update W-4](#)

Update W-4 Confirmation

The updates you requested were successfully processed.

Please contact the Benefits Administrator or Payroll Office if you have any questions about the Tax implications of your changes.

W-4 Employee's Withholding Allowance Certificate

- 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.

SWARTHMORE

[Employee Dashboard](#) • [W-4 Employee's Withholding Allowance Certificate](#)

W-4 Employee's Withholding Allowance Certificate

Federal Tax

As of Date:	09/09/2022
Name:	[REDACTED]
Address:	[REDACTED]
Last Name differs from SSN card:	No
Deduction Status:	Active
Start Date:	03/28/2022
End Date:	
Filing Status	Married Filing Jointly
Nonresident Alien	No
Step 2C Indicator	No
Dependent Amount	2,000.00
Other Income	0.00
Deductions	0.00
Additional Withholding	250.00

Note: Extra Withholding. Enter any additional tax you want withheld each pay period.

[Print](#)

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W2 Year End Earnings Statement

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.
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.

[Employee Dashboard](#) • [W-4 Employee's Withholding Allowance Certificate](#)

W-4 Employee's Withholding Allowance Certificate

Federal Tax

As of Date:	09/09/2022
Name:	[REDACTED]
Address:	[REDACTED]
Last Name differs from SSN card:	No
Deduction Status:	Active
Start Date:	03/28/2022
End Date:	

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

Additional Withholding	250.00
Note: Extra Withholding. Enter any additional tax you want withheld each pay period.	
Print	
History • Update • Contributions or Deductions	
W2 Year End Earnings Statement	

Update W-4

Review Form W-4 2020 for required information on completing a new form W-4. Once you have made changes you will be required to certify those changes by clicking on Certify Changes and then clicking on OK in the pop up window. If the delete option is available select the check box then click on Certify Changes to remove the record.

* - indicates a required field.

Federal Tax

Deduction Effective as of: 09/01/2022

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

Note: See Form W-4 instructions.

Effective Date of Change MM/DD/YYYY: * 09/01/2022

Note: Effective Date must be after 08/31/2022 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.

* Last year I had no tax liability and

* This year I expect to have no tax liability. If you meet both conditions, select "Exempt" in Deduction Status field.

Filing Status: *

Nonresident Alien

Step 2C Indicator

Dependents Under 17 999999.99:

Multiply the number of qualifying children under age 17 by \$2,000.

Other Dependents 999999.99:

Multiply the number of other dependents by \$500.

Dependent Amount 999999.99:

Step 3: Add the amounts above and enter the total here.

Other Income 999999.99:

Step 4a) See Form W-4 instructions.

Deductions 999999.99:

Step 4b) See Form W-4 instructions.

Additional Withholding 999999.99:

Step 4c) Extra Withholding. Enter any additional tax you want withheld each pay period.

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.

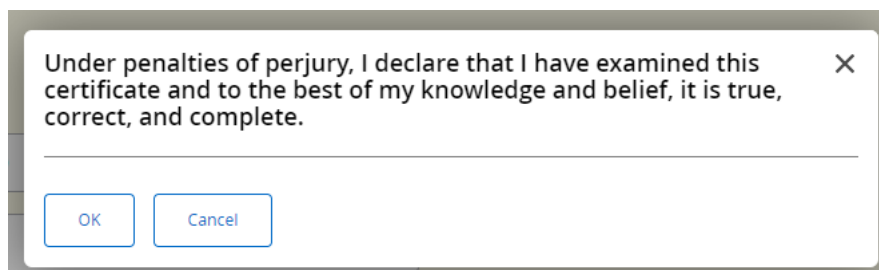
Caution: If you change your deduction status to Exempt, you must meet the eligibility requirements as stated. You will not have federal taxes withheld from your paycheck. You may be liable additional taxes and IRS penalties as a result. Contact the Payroll office if you have any questions regarding use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

6. Select the Certify Changes button.

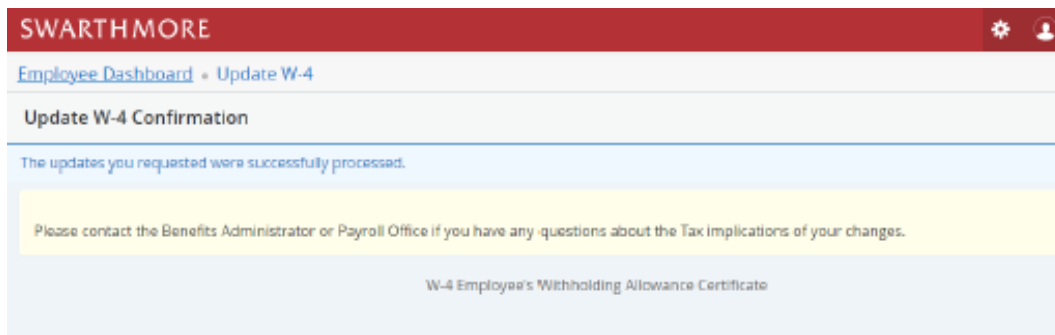
Note: Select the Restore Original Values button if you do not want to save your changes.

- 7) When you select Certify Changes, you will be presented with a declaration of accuracy statement.

An electronic audit of the person making the change will be kept on file.

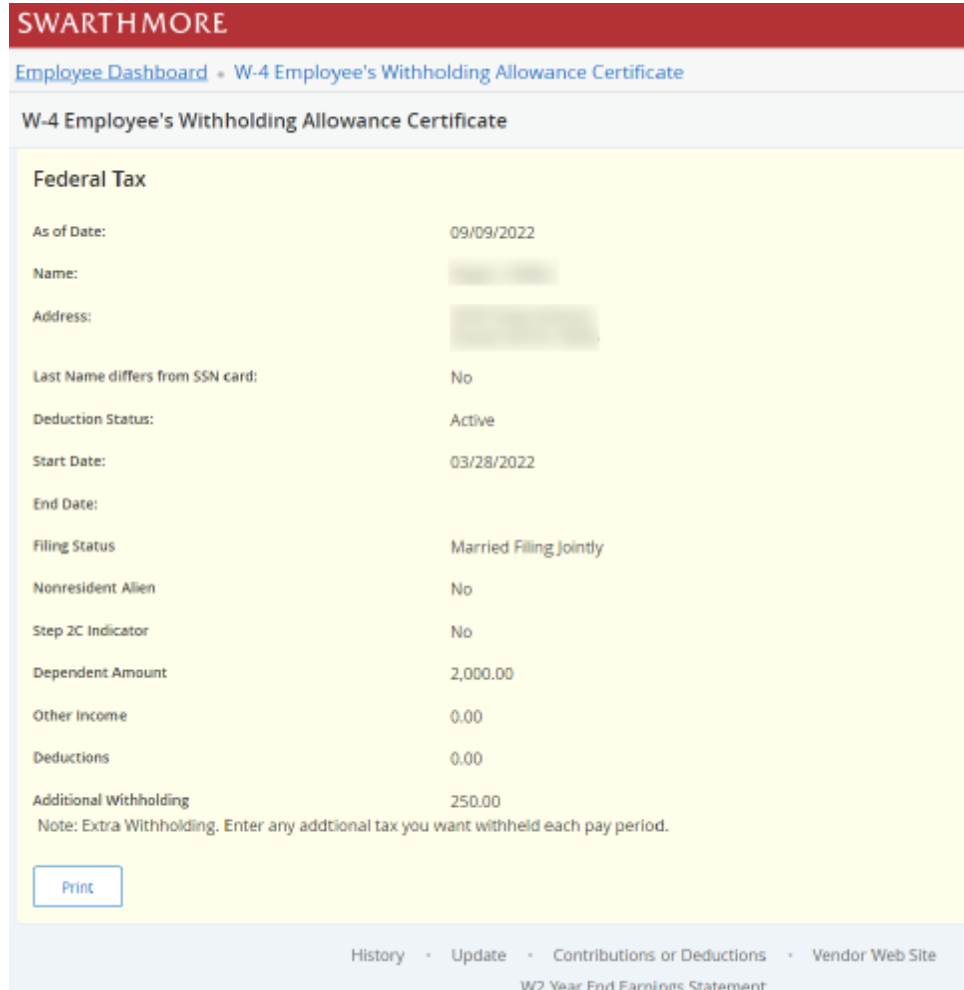


8) If your changes are successfully processed, you will be presented with the following page:



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.

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.



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.

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.

SWARTHMORE

[Employee Dashboard](#) • [W-4 Employee's Withholding Allowance Certificate](#)

W-4 Employee's Withholding Allowance Certificate

Federal Tax

As of Date:	09/09/2022
Name:	[REDACTED]
Address:	[REDACTED]
Last Name differs from SSN card:	No
Deduction Status:	Active
Start Date:	03/28/2022
End Date:	
Filing Status	Married Filing Jointly
Nonresident Alien	No
Step 2C Indicator	No
Dependent Amount	2,000.00
Other Income	0.00
Deductions	0.00
Additional Withholding	250.00

Note: Extra Withholding. Enter any additional tax you want withheld each pay period.

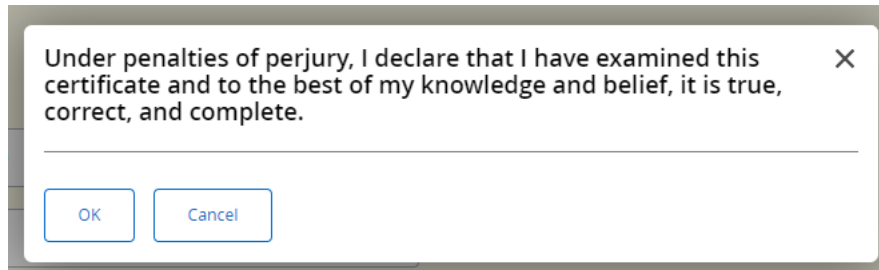
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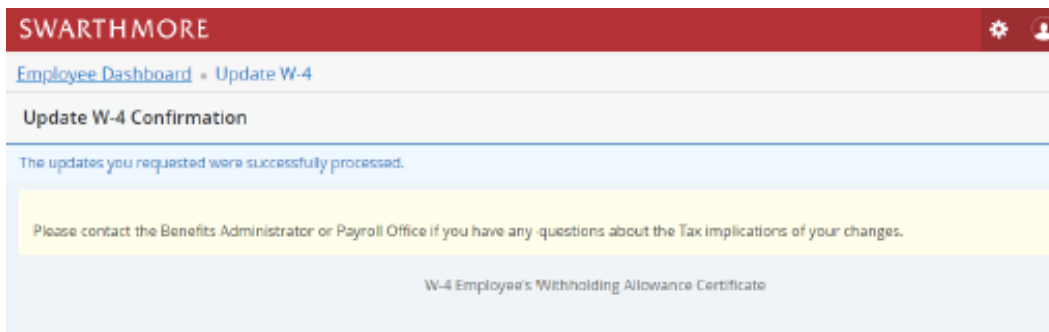
W2 Year End Earnings Statement

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) When you select Certify Changes, you will be presented with a declaration of accuracy statement. An electronic audit of the person making the change will be kept on file.



- 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.

SWARTHMORE

[Employee Dashboard](#) - [W-4 Employee's Withholding Allowance Certificate](#)

W-4 Employee's Withholding Allowance Certificate

Federal Tax

As of Date:	09/09/2022
Name:	[REDACTED]
Address:	[REDACTED]
Last Name differs from SSN card:	No
Deduction Status:	Active
Start Date:	03/28/2022
End Date:	
Filing Status	Married Filing Jointly
Nonresident Alien	No
Step 2C Indicator	No
Dependent Amount	2,000.00
Other Income	0.00
Deductions	0.00
Additional Withholding	250.00

Note: Extra Withholding. Enter any additional tax you want withheld each pay period.

[Print](#)

[History](#) - [Update](#) - [Contributions or Deductions](#) - [Vendor Web Site](#)

W7 Year End Earnings Statement

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.