

## W-4 Tax Information page through the Portal / ULINK:

Faculty & Staff tab > Personal Info > W-4 Tax Information



The screenshot displays the University of Louisville Faculty & Staff portal. The top navigation bar includes "Home" and "Sign out" links. Below the navigation bar, there are tabs for "My Page", "Student Services", and "Faculty & Staff". The "Faculty & Staff" tab is selected, and a "Select One:" dropdown menu is visible. The main content area is divided into several sections:

- Human Resources**: Includes "Diversity & Equal Opportunity" (Affirmative Action, Discriminatory Harassment, Employee Relations, Sexual Harassment Prevention, Information for Persons with Disabilities) and "Employee Benefits" (Benefits Enrollment, Benefits Home Page, Benefits Summary, Dependents Covered, Dependent Update, Dental Plan, Employee Assistance Program, Flexible Spending Accounts, Health Plan, PC Loan Program, Retirement Plans, Vision Plans).
- Personal Information**: Includes "General Information" (Pan Am Travel Program) and "Personal Info" (Personal Information Summary, Home and Mailing Addresses, Phone Numbers, Race/Ethnicity Update, Paycheck, Wage & Tax Statement (W2), **W-4 Tax Information**, and Shibboleth). A blue arrow points to the "W-4 Tax Information" link.
- Academics**: Includes "Faculty Center" (Bookstore Textbook Orders for Faculty, Class Rosters, Class Schedule).
- External Links**: Includes Compliance Hotline Reporting, Mailing Lists (LISTSERV), PeopleSoft CS, and PeopleSoft HR.
- University Reports**: Includes University Reports and Guest University Reports.
- Financial**: Includes "General Information" (PeopleSoft Financials, Budget Overview, SpeedTypes), "Payroll" (Payroll, Position Management), and "Procard".

## W-4 Tax Information page through PeopleSoft:

Self-Service > Payroll and Compensation > W-4 Tax Information

\*\*See next page for example of self-service W-4 form. Your name and Social Security number will be at the top of the page where the blue boxes are below. Verify their accuracy as well as the accuracy of your home and mailing addresses. Be sure to check the box by the blue arrow, as this is your electronic signature.\*\*

## W-4 Tax Information

[Redacted]

Social Security Number:

[Redacted]

University of Louisville

You must complete Form W-4 so the Payroll Department can calculate the correct amount of tax to withhold from your pay. Federal income tax is withheld from your wages based on marital status and the number of allowances claimed on this form. You may also specify that an additional dollar amount be withheld. You can file a new Form W-4 anytime your tax situation changes and you choose to have more, or less, tax withheld.

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 required to send a copy of this form to the IRS.

For worksheets and additional instructions from IRS.gov, click on the link [Form W-4](#).

Home Address

Louisville KY 40299

Mailing Address

Louisville KY 40299

### W-4 Tax Data

Enter total number of Allowances you are claiming:

Enter Additional Amount, if any, you want withheld from each paycheck:

Indicate Marital Status:  Single  Married

Check here and select Single status if married but withholding at single rate.

Note: If married, but legally separated, or spouse is a nonresident alien, select 'Single' status.

Check here if your last name differs from that shown on your social security card.

You must call 1-800-772-1213 for a new card.

### Claim Exemption

I claim exemption from withholding for the year  and I certify that I meet

**BOTH** of the following conditions for exemption:

1. Last year I had a right to a refund of ALL Federal income tax withheld because I had NO tax liability.
2. This year I expect a refund of ALL Federal income tax withheld because I expect to have NO tax liability.

Check this box if you meet both conditions to claim exempt status.

I have agreed to submit this form W-4 by electronic means. By signing this form electronically, I certify 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.

By checking this box, I am electronically signing my form W-4.

Submit

Message received if employee does not check the signature certification box before Submit:

The screenshot shows the University of Louisville Self Service portal for W-4 Tax Information. A modal message box is displayed over the form. The message text is: "Please select the Signature certification check box. (20000,626) It is Mandatory to select the Signature certification check box before you submit W-4 Form." The message box has an "OK" button. In the background, the form includes a "Claim Exemption" section with several radio button options and a "Submit" button at the bottom.

Verify Identity box received after clicking Submit button (employee must enter current password):

The screenshot shows the University of Louisville Self Service portal for W-4 Tax Information. A modal "Verify Identity" dialog box is displayed over the form. The dialog box contains the text: "To protect your privacy, verify your identity by typing your password. If you are not this user, click Sign Out." Below this text, it displays "User ID: METHOM01" and a "Password:" label followed by a text input field. At the bottom of the dialog box are "Continue" and "Cancel" buttons. In the background, the form shows the "W-4 Tax Data" section with a field for "Enter total number of Allowances you are claiming:" set to "2".

Message received if attempting to claim Exempt status and enter Allowances or an Additional Amount:

The screenshot shows the University of Louisville's W-4 Tax Information page. The page header includes the University of Louisville logo and navigation links: Home, Worklist, Add to Favorites, and Sign out. The breadcrumb trail is: Favorites > Main Menu > Self Service > Payroll and Compensation > W-4 Tax Information.

**W-4 Tax Data**

Enter total number of Allowances you are claiming:

Enter Additional Amount, if any, you want withheld from each paycheck:

Indicate Marital Status:  Single  Married

Check here and select Single status if married and legally separated, or select 'Single' status.  
Note: If married, but legally separated, or if you are a widow or widower, you must select 'Single' status.

Check here if your last name differs from your employer's name.  
You must call 1-800-772-1213 for a new certificate.

**Claim Exemption**

I claim exemption from withholding for the EXEMPT indicator. BOTH of the following conditions for exemption must be met:

1. Last year I had a right to a refund of ALL Federal income tax withheld because I had NO tax liability.
2. This year I expect a refund of ALL Federal income tax withheld because I expect to have NO tax liability.

Check this box if you meet both conditions to claim exempt status.

I have agreed to submit this form W-4 by electronic means. By signing this form electronically, I certify 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.

\* By checking this box, I am electronically signing my form W-4.

**Message**

You cannot claim allowances and/or an additional amount and also claim exemption from withholding. (2001,719)

You must remove the number of allowances and the additional withholding amount or uncheck the EXEMPT indicator.

Message received when “married but withholding at single rate” checkbox is selected but Marital Status of Married is selected:

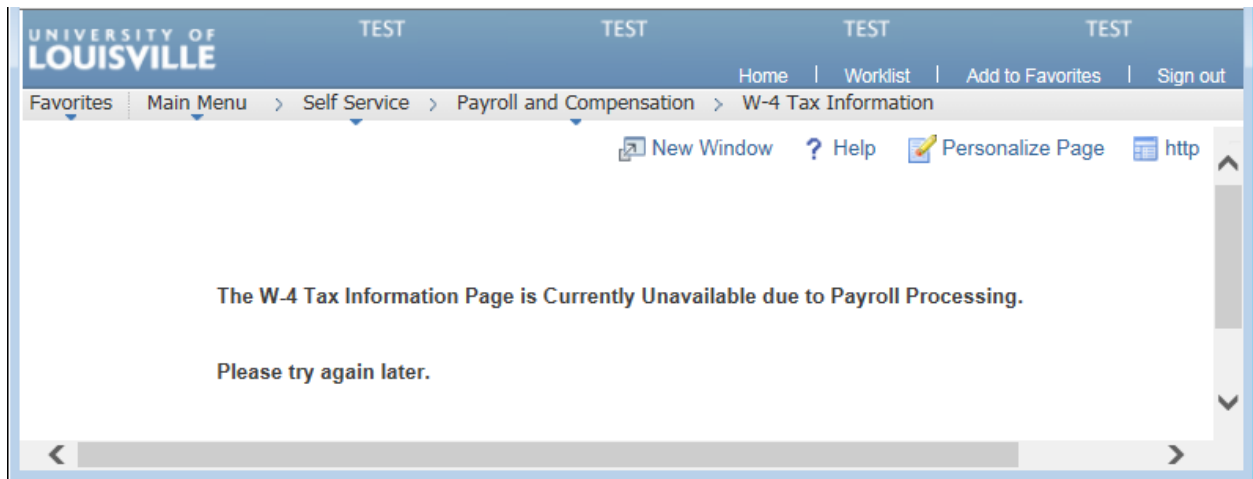
The screenshot shows the University of Louisville Self Service portal for W-4 Tax Information. The form includes fields for 'Enter total number of Allowances you are claiming' (value: 2) and 'Enter Additional Amount, if any, you want withheld from each paycheck' (value: 30.00). The 'Indicate Marital Status' section has radio buttons for 'Single' and 'Married', with 'Married' selected. A checkbox labeled 'Check here and select Single status if married but withholding at single rate.' is checked. A message dialog box is overlaid on the form, containing the text: 'Marital Status of Single must be selected if married but withholding tax at Single rate. (2000,729). Select Marital Status of "Single" when the "married but withholding at single rate" checkbox is selected.' and an 'OK' button.

Submit Confirmation received following successful Submit:

The screenshot shows the University of Louisville Self Service portal displaying a 'Submit Confirmation' message. The message text reads: 'The Submit was successful. However, due to timing, your change may not be reflected on the next paycheck.' There is an 'OK' button next to the message.

Timing: If you are paid on the Biweekly payroll, your changes need to be made by the last day of the pay period (Thursday) to be effective for that payday – the following Friday. For Monthly paid employees, submission 10 days before payday will be effective that month except for November and December. November 17<sup>th</sup> and December 1<sup>st</sup> are the deadlines for those months.

Message received when Payroll Final process is running for your pay group.



If you have questions or concerns, call Payroll Services at 502-852-2978.