

W-4 Form and Tax Time

This is the time of year when many people review their tax status and may decide to submit a new Form W-4.

- A new Form W-4 for 2020 was recently released by the IRS. If you need help to fill out the new form, please consult a tax expert. Remember, neither DSHS staff nor PPL staff can provide tax advice.
- **Call the IRS Customer Service help line at 800-829-1040 or visit the IRS FAQ.**
- Reminder, if you submit a new Form W-4, do not send your form to DSHS. Your Form W-4 must be submitted to PPL for processing, and can be either faxed or mailed. PPL cannot accept Form W-4 submitted via email.
- If you claim Exempt from withholding, you **must** submit a new Form W-4 each year. PPL will send you a letter in February 2020 as a reminder to send in a new form if you wish to continue to claim Exemption from withholding.
- To claim Exempt on the 2020 Form W-4, see the following example:

Future developments. For the latest information about any future developments related to Form W-4, such as legislation enacted after it was published, go to www.irs.gov/FormW4.

Purpose. Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Consider completing a new Form W-4 each year and when your personal or financial situation changes.

Step 4 (optional): Other Adjustments	(a) Other income. 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. You should not include income from any jobs	4(a)	\$	
	(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	4(b)	\$	
	(c) Extra withholding. Enter any additional tax you want withheld each pay period	4(c)	\$	
IF you want to claim "Exempt" for 2020, write the word "Exempt" here, as shown (per instructions on page 2) →				EXEMPT

Exemption from withholding. You may claim exemption from withholding for 2020 if you meet both of the following conditions: you had no federal income tax liability in 2019 **and** you expect to have no federal income tax liability in 2020. You had no federal income tax liability in 2019 if (1) your total tax on line 16 on your 2019 Form 1040 or 1040-SR is zero (or less than the sum of lines 18a, 18b, and 18c), or (2) you were not required to file a return because your income was below the filing threshold for your correct filing status. If you claim exemption, you will have no income tax withheld from your paycheck and may owe taxes and penalties when you file your 2020 tax return. To claim exemption from withholding, certify that you meet both of the conditions above by writing "Exempt" on Form W-4 in the space below Step 4(c). Then, complete Steps 1(a), 1(b), and 5. Do not complete any other steps. You will need to submit a new Form W-4 by February 16, 2021.

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