HCM User Group Meeting Webinar 01-30-20
Questions and Answers

#	Questions	Answers
Form Version	**When will the form be implemented in the system?**	The new Form was fully installed into the system on Thursday Jan 30.
Form Version	**Do we know when the new 2020 version in TeamWorks will be fully functional for HR/Payroll and employees?**	The new Form was fully installed into the system on Thursday Jan 30.
Form Version	**For new EE's coming on with us, do they fill out both the 2019 and 2020 tax forms?**	New employees will only need to complete the new form. After Thursday, Jan 30, the system will automatically insert a '2020 or Later' row when the new hire is entered.
Form Version	**When should we update PeopleSoft with the 2020 W4 form information?**	On December 31st, SAO instructed agencies to use both forms for new hires and use the '2019 or Earlier' setting until we could get the new form implemented. Beginning Thursday Jan 30, agencies agencies will need to enter the W-4 elections from the new form for employees hired 1/1/2020 or later and employees with changes to their federal withholding effective 1/1/2020 or later.
Form Version	**Just to be clear, all new hires that were entered Jan. 2020, where we used the 2019 button, are we now to reenter them using the Feb. 1, 2020 effective date?**	Yes, see previous response.
Form Version	**If an employee hired prior to 2020 made changes to the W4 on self-service in 2020 prior to today, will they need to go back in after today and update again?**	If an employee that was hired prior to Jan 1, 2020 made changes to their federal withholding on or after Jan 1, 2020, that employee should go back in and re-set their settings to update to the 2020 or Later version of the form.
Form Version	**Any adjustments to W-4 for employees hired prior to 1/1/20 will be based on the old version, correct?**	Employees, even those hired prior to Jan 1, 2020, who wish to make a change or update their settings, must use the new form. Employees that wish to have their W-4 settings remain the way they are do not have to complete a new form. Also, Employees that wish to change only their State/Local settings do not have to complete a new federal W-4.

Form Version	So we now use the radio button for 2020, not 2019 and earlier?	The '2020 or Later' button will be used for new hires and for employees that want to make updates or adjustments to their current Federal withholding. The '2019 or Earlier' button should be used when the employee only wants to change their state withholding.
Form Version	What if an employee hired prior to Jan 1, 2020 using the 2019 makes a change in 2020 but doesn't choose the radio dial to change to 2020 and leaves it on 2019, what happens then?	Employees do not see the buttons in Self Service. Employees will use the W-4 Tax Information page in Employee Self Service and if an employee makes an adjustment on this page, the system will insert a new effective dated row and will select the '2020 or Later' radio button. If an employee makes a change to State/Local settings, you will see a new effective dated row and the '2019 or Earlier' button will be selected.
H of H	Is there an issue with PeopleSoft and employees who select Head of Household and a $$$ amount on the form?	An issue was identified shortly after the previous tax updated where the system allowed the selection of 'Head of Household prior to the value being a valid value for selection. This problem has now been resolved.
H of H	Do we know when the Head of Household designation will be working properly?	As of Thursday, Jan 30, the 'Head of Household' designation value is working correctly.
IRS Instruction	When we as the employer are entering the tax information for a new employee, how do we determine when to check the box "Multiple Jobs or Spouse Works" based on the new W4 Form?	If the employee has completed a paper version of the form, and the employee has selected this option, the small box on the right hand side of the form next to Step 2 (c) will be checked. This will indicate that the "Multiple Jobs or Spouse Works" should be checked on the Administrator page. Employees are responsible for making the selections on the form.
IRS Instruction	Where on the printed W4 form does it indicate that we should check the "Multiple Jobs or Spouse Works" box on the Administrative page?	See previous response.

IRS Instruction	**Where on the paper form is the exempt selection?**	The following is from Page 2 of the instruction booklet. "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."
IRS Instruction	**On the directions of the form it states that we are supposed to write Exempt on the line under section 4c, correct?**	Yes, as per the previous response.
IRS Instruction	**From what I gather in reading the instructions, when manually completing a new 2020 W-4 and an employee wishes to claim exempt, they must hand-write it on the 2020 W-4 form in space below Step 4 (c). Is this correct?**	Yes, as per the previous response.
IRS Instruction	**If an eel hired in 2019 has a $50 extra withholding. Will this withholding remain in 2020?**	If the employee does nothing to update their settings in the system, this withholding will remain. If the employee does go into the system to update their withholding, this value will need to be re-entered.
IRS Instruction	**Correspondence was sent out to employees advising them to touch their W4s due to filing 10 allowances or more. When we have to adjust there allowances to single and zero. Now that that's not an option, what do we use?**	The new instructions require the employee to identify the number of 'qualifying children' and multiply that amount by $2000 and enter that amount in the Step 3 and then they must identify the number of 'other dependents' and multiply that amount by $500 and enter that amount. The total of these two amounts is what will be used instead of allowances.
System Operation	**What happens when the employee doesn't enter any data on the form other than their name/address signature?**	Employees (new hires) that do not complete any of the other sections of the form will automatically be set to 'Single' with no other adjustments or deductions.
System Operation	**What happens when the employer receives a notice from the IRS to withhold at a higher rate for the employee?**	Oracle did not provide any instruction on this matter. SAO assumes that such a letter from the IRS would contain more specific instructions on how those entries should be made.
System Operation	**Will an employee who is currently employed but given a promotion, will they have to enter a new W4 form, because they are moving from hourly to salary?**	No, a promotion within the company will not automatically require the completion of a new W-4 form.
System Operation	**If they change agencies, OHR requires them to complete all new tax forms so they would need to do a new form?**	The system itself would not require it, that would be an agency policy, if that is the case.

Communications	Will a new announcement be sent out to communicate the fact that only the 2020 form needs to be completed?	Yes, this announcement went out along with the announcement of the availability of this FAQ document.
Communications	Can you please stipulate that the use of updating W-4 in TEAMWORKS does not apply to DFCS employees as they are not on PS payroll?	Please note that these responses apply to all agencies using TeamWorks to process their payroll.