



## W-4 Entry into Prism

1. Request updated form from employee. Make sure the form is filled in completely and signed at the bottom. Remember Infiniti HR is not permitted to give tax advice. Please refer employee to the IRS website: <https://www.irs.gov/pub/irs-pdf/fw4.pdf> and the Tax Withholding Estimator available at [www.irs.gov/W4app](http://www.irs.gov/W4app) or to their tax preparer.
2. Check that the SSN matches the profile in Prism.
3. **Step 1, part C** is the **Federal Filing Status in Prism**

Form <b>W-4</b> (Rev. December 2020) Department of the Treasury Internal Revenue Service	<b>Employee's Withholding Certificate</b>		OMB No. 1545-0074
	▶ 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.		<b>2021</b>
<b>Step 1:</b> <b>Enter Personal Information</b>	(a) First name and middle initial	Last name	(b) Social security number
	Address		▶ 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 <a href="http://www.ssa.gov">www.ssa.gov</a> .
	City or town, state, and ZIP code		
	(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.)		

Federal Tax Filing

Federal Filing Status

Married Filing Jointly

4. **Step 2, Multiple jobs**, if employee checked the box, check the **Multiple Jobs box** in Prism

**Step 2:**

**Multiple Jobs or Spouse Works**

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](http://www.irs.gov/W4App) for most accurate withholding for this step (and Steps 3–4); 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 . . . .

**TIP:** To be accurate, submit a 2021 Form W-4 for all other jobs. If you (or your spouse) have self-employment income, including as an independent contractor, use the estimator.

Complete Steps 3–4(b) on Form W-4 for only **ONE** of these jobs. Leave those steps blank for the other jobs. (Your withholding will

Federal Tax Filing  
 Federal Filing Status: Married Filing Jointly  
 Multiple Jobs:

5. **Step 3, Claim Dependents**, enter the total \$ amount from Line 3 into **Claim Dependents (\$)** in Prism. It is a dollar amount.

**Step 3: Claim Dependents**

If your total 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** \$

Federal Tax Filing  
 Federal Filing Status: Head of Household  
 Multiple Jobs:   
 Claim Dependents (\$): 2,000.00

6. Step 4 is optional, only fill in if the Employee has completed. All of these are dollar \$ amounts.

- Other Income 4a** goes into **Other Income**
- Deductions 4b** goes to **Deductions (\$)**
- Extra Withholding** choose **Override Type - Add to Withholding** and put \$ amount in **Override Amount**.

**Step 4 (optional): Other Adjustments**

(a) **Other income (not from jobs)**. 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 . . . . . **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)** \$

Federal Tax Filing  
 Federal Filing Status: Married Filing Jointly  
 Multiple Jobs:   
 Claim Dependents (\$): 2,000.00  
 Other Income: 0.00

Deductions (\$): 0.00  
 Override Type: Add to Withholding  
 Override Amount:

NOTE: If an employee is claiming **Exempt**, they must **write EXEMPT** in the space below 4c. In Prism you choose **Block Withholding**.

enter the result here . . . . . **4(b)** \$

(c) **Extra withholding**. Enter any additional tax you want withheld each pay period . . . . . **4(c)** \$

### Federal Tax Filing

Federal Filing Status

Single or Married filing Separately ▾

Multiple Jobs

Deductions (\$)

Claim Dependents (\$)

Override Type

Block Withholding ▾

Other Income

Override Amount

7. Save the new W-4 form to the **Documents** section of the **Employee Details**.

HR / Change / Employee Details Client: (29999) DEMO CLIENT

Oscar Grouch

Employee: D05368

Name & Contact

Last Name: Grouch Work Phone: Work Email:

First Name: Oscar

HR / Change / Employee Documents Client: (29999) DEMO CLIENT

Employee Documents

Document Name	Notes	Date Attached	ESS
No Documents Loaded			

[Load a Document](#)

Close

- Audit
- Benefit Overview
- Benefits Adjustment
- Change User Password
- Deduction Arrears
- Documents
- Employee Benefits Enrollment