

Completing W-4 and VA-4 tax forms

Overview

- All employees are required to complete the W-4 and VA-4 tax forms.
- Albemarle County cannot provide tax advice; we recommend that you contact a tax professional if you have questions. The purpose of this document is to guide you through the process of completing your tax forms. Below are some additional resources that you might find helpful:
 - [W-4 Form: How to Fill It Out in 2022 \(investopedia.com\)](https://www.investopedia.com/articles/etf/01/011512-how-to-fill-out-w-4-form-2022-1011512.html)
 - <https://www.nerdwallet.com/article/taxes/how-to-fill-out-form-w4-guide#how-to-fill-out-a-w-4-form>
 - <https://turbotax.intuit.com/tax-tools/calculators/w4/>
 - <https://turbotax.intuit.com/tax-tools/calculators/taxcaster/>

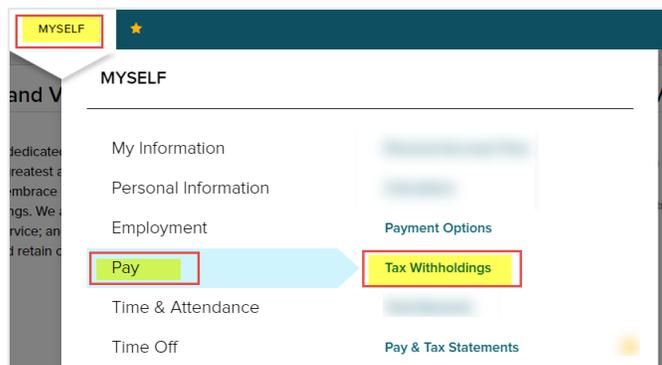
Preparing to complete the W-4 and VA-4 tax withholding forms

Before you log into ADP to fill out your tax forms, here are a few ways to prepare:

- Click here to access a blank W-4 and accompanying worksheets:
<https://www.irs.gov/pub/irs-pdf/fw4.pdf>
- Click here to access a blank VA-4 and accompanying worksheet:
<https://www.tax.virginia.gov/sites/default/files/taxforms/withholding/any/va-4-any.pdf>

NOTE: *The VA-4 form is not available for completion in ADP until you complete the W-4 form.*

1. Log into ADP with the username and password you created:
<https://workforcenow.adp.com>
2. Click on **Myself**, then click on **Pay**, then click on **Tax Withholdings**.



3. Click on the **Federal** tile and select **Start**.



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4. As noted in the preparation area, it's a good idea to have on hand the blank W-4 and instructions, so that you can work through all necessary calculations to complete the form correctly. You can also use the link on this slide to access this information.

Federal Tax Withholding

Before You Begin

Beginning with 2020, the Federal Withholding Form W-4 is significantly different from prior versions. It's recommended that you download and review the form, instructions, and worksheets prior to completing this process.

[Download a blank copy of Form W-4](#)

After you review the instructions, you will fill out your Form W-4 using this convenient tool. Complete the form so that your employer can withhold the correct federal income tax from your pay. The IRS recommends that you complete a new Form W-4 when your personal or financial situation changes.

If you need assistance completing your Form W-4, consult your tax professional.

CANCEL NEXT

5. A wizard opens that walks you through the process of completing the W-4; review information on this slide and then click on the **Next** button.

Federal Tax Withholding

DOWNLOAD BLANK FORM W-4

Is this information correct?

If your name is incorrect, contact your HR Representative to have it fixed before you proceed.

Your first name, middle, and last name
Carlo E Garland

Your home address
549 West Areba Avenue
Hershey, PA 17033
US

Your Social Security number
Applied For

SAMPLE ONLY

Does your name match the name on your Social Security card? If not, to ensure you get credit for your earnings, contact the SSA at 800-772-1213 or go to www.ssa.gov

CANCEL PREVIOUS NEXT

Note: if your name is not correct, you will contact your division's Human Resources department to make that correction. The process requires submitting a new social security card and a form updating your personal information.

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6. Select your residential status and then click **Next**.

Federal Tax Withholding [DOWNLOAD BLANK FORM W-4](#)

Are you a nonresident alien?

You are considered a nonresident alien if you are not a US citizen and do not meet either the green card test or the substantial presence test for the calendar year (January 1 - December 31).

I'm a nonresident alien.

I'm a US citizen or a resident alien.

7. Select your filing/marital status and then click **Next**.

Federal Tax Withholding [DOWNLOAD BLANK FORM W-4](#)

What is your filing/marital status?

Single or Married filing separately

Married filing jointly (or Qualifying widow(er))

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)

8. Select your tax exemption status and click **Next**.

Are you tax exempt?

Refer to the General Instructions of [Form W-4 Employee's Withholding Certificate](#)

I claim exemption from withholding for the current year, and I certify that I meet **both** of the conditions for exemption:

- For last year, I had **no** federal income tax liability
- For this year, I expect to have **no** federal income tax liability.

If you claim exemption, you will have no income tax withheld from your paycheck and may owe taxes and penalties when you file next year's tax return.

I do not claim exemption from withholding

9. If you have multiple jobs or your spouse works, complete the *Multiple Jobs or Spouse Works* form.
10. If you have dependent children, enter the correct number of dependents, then click **Next**.

Completing W-4 and VA-4 tax forms

Federal Tax Withholding [DOWNLOAD BLANK FORM W-4](#)

Multiple Jobs or Spouse Works ⓘ
Do **only one** of the following to calculate your withholding: ⓘ
a. Use the estimator at www.irs.gov/w4app for the most accurate withholding, or
b. Use the Multiple Jobs Worksheet here and enter the result into Extra Withholding line; or
c. If there are only two jobs, select this Multiple Jobs checkbox to use the optional higher withholding table

Claim Dependents ⓘ ⓘ
Complete this section for only one job in the household if (1) you have multiple jobs and (2) your income will be \$200,000 or less (\$400,000 or less if married filing jointly).
Your withholding will be most accurate if you complete this for the highest paying job

Number of qualifying children under age 17 \$0

Number of other dependents

Total dependent amount ⓘ ⓘ \$0

ⓘ

11. If you need to make other adjustments, complete the below *Withholding* form, then click **Next**.

Note: if you complete the Extra Withholding box, please note that those additional withholdings will be taken from EACH paycheck.

Federal Tax Withholding [DOWNLOAD BLANK FORM W-4](#)

Other Adjustments ⓘ ⓘ
Complete this section for only one job in the household.
Your withholding will be most accurate if you complete Other Income and Deductions for the highest paying job.

Other Income ⓘ
If you want tax withheld from other income you expect this year that won't have withholding, enter the amount of the other income here. This may include interest, dividends, and retirement income. You should not include income from any jobs.

Deductions ⓘ
If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use the Deductions Worksheet and enter the result here.

Extra Withholding ⓘ ⓘ
Enter any additional tax you want withheld each pay period

ⓘ

12. On the next screen, you can review the W-4 form to confirm accuracy. To agree to the statements, click the **checkbox** and click **DONE**.

Completing W-4 and VA-4 tax forms

NOTE: we recommend that you print a copy of the completed W-4 for your records. Click **Print Completed Form**.

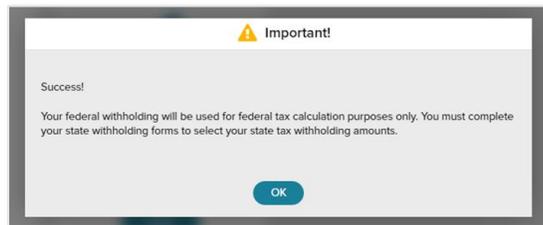
The image shows the 2021 Form W-4, Employee's Withholding Certificate. The form is partially filled out with the following information:

- Step 1: Personal Information**
 - First name and middle initial: Carlo E
 - Last name: Garland
 - Address: 549 West Areba Avenue, Hershey, PA, 17033
 - Married filing jointly or Qualifying widow(er):
 - Head of household:
- Step 2: Multiple Jobs or Spouse Works**
 - Do only one of the following:
 - (a) Use the estimator at 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.
- Step 3: Claim Dependents**
 - Claim: Multiply the number of qualifying children under age 17 by \$2,000. \$
 - Dependents: Multiply the number of other dependents by \$500. \$
- Step 4: Other income (not from jobs)**. If you want tax withheld for other income you expect: 3 \$

At the bottom of the form, there is a declaration box with a checked box: "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." Below this is a date field: "Date: Nov 17 2021". At the bottom right, there are buttons for "CANCEL", "PREVIOUS", "DONE" (highlighted in red), and "PRINT COMPLETED FORM".

13. Once the federal tax withholdings form is complete, a pop-up window will appear reminding you to complete the state withholding form.

14. Click **OK** to proceed.



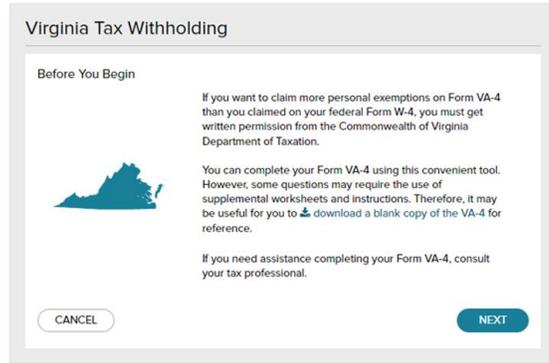
15. To update State withholding, click the **Start** button in the Virginia tile.

16. **NOTE:** The VA-4 form is not available for completion until the W-4 form is finalized.



Completing W-4 and VA-4 tax forms

17. As noted in the preparation area, it's a good idea to have on hand the blank VA-4 form and instructions, so that you can work through all necessary calculations to complete the form correctly. You can also use the link on this slide to access this information.



Virginia Tax Withholding

Before You Begin

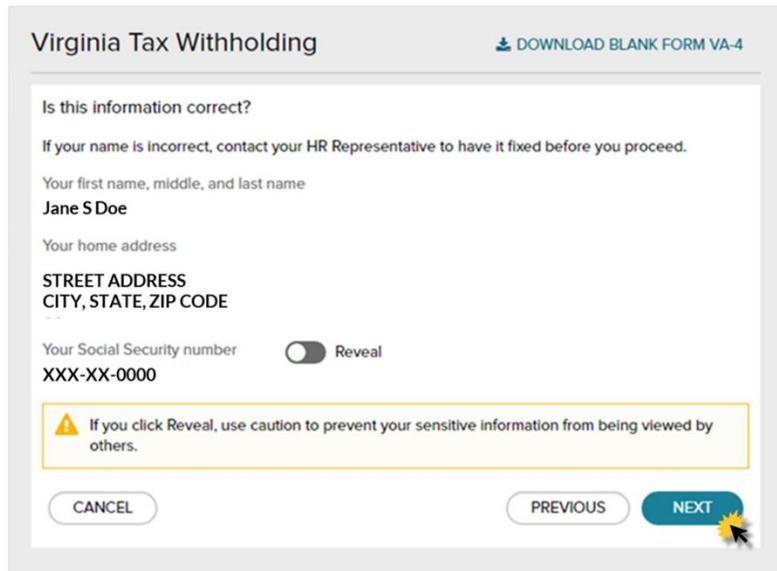
If you want to claim more personal exemptions on Form VA-4 than you claimed on your federal Form W-4, you must get written permission from the Commonwealth of Virginia Department of Taxation.

You can complete your Form VA-4 using this convenient tool. However, some questions may require the use of supplemental worksheets and instructions. Therefore, it may be useful for you to [download a blank copy of the VA-4 for reference](#).

If you need assistance completing your Form VA-4, consult your tax professional.

[CANCEL](#) [NEXT](#)

18. A wizard opens that walks you through the process of completing the VA-4; review information on this slide and then click on the **Next** button.



Virginia Tax Withholding [DOWNLOAD BLANK FORM VA-4](#)

Is this information correct?

If your name is incorrect, contact your HR Representative to have it fixed before you proceed.

Your first name, middle, and last name
Jane S Doe

Your home address
STREET ADDRESS
CITY, STATE, ZIP CODE
--

Your Social Security number Reveal
XXX-XX-0000

⚠ If you click Reveal, use caution to prevent your sensitive information from being viewed by others.

[CANCEL](#) [PREVIOUS](#) [NEXT](#)

Note: if your name is not correct, you will contact your division's Human Resources department to make that correction. The process requires submitting a new social security card and a form updating your personal information.

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19. Enter the **number of exemptions** you wish to claim and any **additional withholdings**, if desired.

Virginia Tax Withholding [DOWNLOAD BLANK FORM VA-4](#)

How many exemptions are you claiming?

Subtotal of Personal Exemptions - line 4 of the Personal Exemption Worksheet

Subtotal of Exemptions for Age and Blindness - line 7 of the Personal Exemption Worksheet

Do you want to withhold additional taxes?

Additional amount, if any, you want withheld from each paycheck

Note: if you complete the Extra Withholding box, please note that those additional withholdings will be taken from EACH paycheck.

20. Select your **tax exemption status**, then click **Next**.

Virginia Tax Withholding [DOWNLOAD BLANK FORM VA-4](#)

Are you tax exempt?

I certify that I am not subject to Virginia withholding. I meet the conditions set forth in the instructions on Form VA-4

I am not subject to Virginia withholding because I meet the requirements set forth under the Service member Civil Relief Act, as amended by the Military Spouses Residency Relief Act

I do not claim exemption from withholding

21. On the next screen, you can review the VA-4 form to confirm accuracy. To agree to the statements, click the **checkbox** and click **DONE**.

NOTE: we recommend that you print a copy of the completed VA-4 for your records. Click **Print Completed Form**.

Virginia Tax Withholding [DOWNLOAD BLANK FORM VA-4](#)

Your Form VA-4, Employee's Virginia Income Tax Withholding Exemption Certificate

Review the entire form carefully. If needed, to confirm that everything is true, correct and complete, check the box below the form. Then, click Done.

FORM VA-4 COMMONWEALTH OF VIRGINIA
DEPARTMENT OF TAXATION
PERSONAL EXEMPTION WORKSHEET
(See back for instructions)

1. If you wish to claim yourself, write "1"
2. If you are married and your spouse is not claimed on the tax return, write "2"
3. Write the number of dependents you will be allowed to claim on your return for whom you do not include your spouse
4. Subtotal Personal Exemptions (add lines 1 through 3)
5. Exemptions for age
(a) If you will be 65 or older on January 1, write "1"
(b) If you claimed an exemption on line 2 and your spouse will be 65 or older on January 1, write "1"
6. Exemptions for blindness
(a) If you are legally blind, write "1"
(b) If you claimed an exemption on line 2 and your spouse is legally blind, write "1"
7. Subtotal exemptions for age and blindness (add lines 5 through 6)
8. Total of Exemptions - add line 4 and line 7

Print name and give the certificate to your employer. Keep the top portion for your records

FORM VA-4 EMPLOYEE'S VIRGINIA INCOME TAX WITHHOLDING EXEMPTION CERTIFICATE

PROFESSIONAL REGISTRATION: "None"

DOB - MM - XXXX Jane S Dine

Street Address
123
CHARLOTTEVILLE VA 22901-2008

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.

I agree under penalty of perjury to the declaration above and understand that this form is not valid until I have provided my electronic signature by acknowledging and clicking Done.

22. The tax withholdings are now complete.

Completing W-4 and VA-4 tax forms

23. You may download and view the forms by clicking **View Saved Tax Forms**.

