

California State University, Long Beach Research Foundation
Memorandum

2020 Form W-4

December 11, 2019

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To: CSULB Research Foundation Employees
From: John Taylor
Payroll Manager
Subject: 2020 Form W-4

The 2020 Form W-4, Employees Withholding Certificate, is very different from previous versions. This is due to the federal tax law changes that took place in 2018. The Internal Revenue Service (IRS) is not requiring all employees to complete the revised form and has designed the withholding tables so that they will work with both the new and prior year forms. However, certain employees will be required to use the new form: those hired in 2020 and anyone who makes withholding changes during 2020.

Even though the IRS does not require all employees to complete the revised form and even if your tax situation has not changed, we recommend you perform a “paycheck checkup” to see if you need to make adjustments to your current withholding. To conduct the checkup, you can use the [IRS's Tax Withholding Estimator](#). You should make sure to have a copy of your most recent pay stub and tax return handy if possible. The estimator will be updated for the 2020 tax year in early January. **Remember: you are not required to submit a new form and withholdings will continue based on the form you have on file now.**

Before completing the 2020 Form W-4, please read the instructions that are included with the form (see attached). You must complete Steps 1 and 5. Steps 2, 3, and 4 are optional, but completing them will help ensure that your federal income tax withholding will more accurately match your tax liability. Step 1 is for your personal information; Step 2 is for households with multiple jobs; Step 3 is used to claim tax credits for dependents; Step 4 is for other adjustments (additional income such as interest and dividends, itemized deductions that exceed the standard deduction, and extra tax that you may want withheld; Step 5 is where you sign the form.

Your privacy is very important and if you are worried about reporting income from multiple jobs in Step 2 or other income in Step 4, you should use the withholding estimator to determine how much additional tax to withhold and enter it in Step 4 - C.

The IRS has also published Frequently Asked Questions that you may find helpful.

Please keep in mind the Research Foundation is not able to provide any tax advice. If you have any questions, contact your tax preparer or contact the I.R.S. directly.

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