

Changing Deductions — W-4 Form

APTAWEB-10768, APTAWEB-10778, APTAWEB-10781

Introduction

AptaFund has a new feature where employees have the ability to fill out a W-4 form online and submit it to the payroll administrator, as well as print a copy. This option can be found under **My AptaFund > Employee Self-Service > My Deductions**.

When a new W-4 form has been submitted by an employee, an email can be scheduled to go out to any user who has the permission to approve a deduction set. The user can view and accept the changes by going into **Human Resources > Deduction Change Requests**.

My AptaFund > Employee Self-Service > My Deductions

From the **My AptaFund > Employee Self-Service** menu, select **My Deductions**.

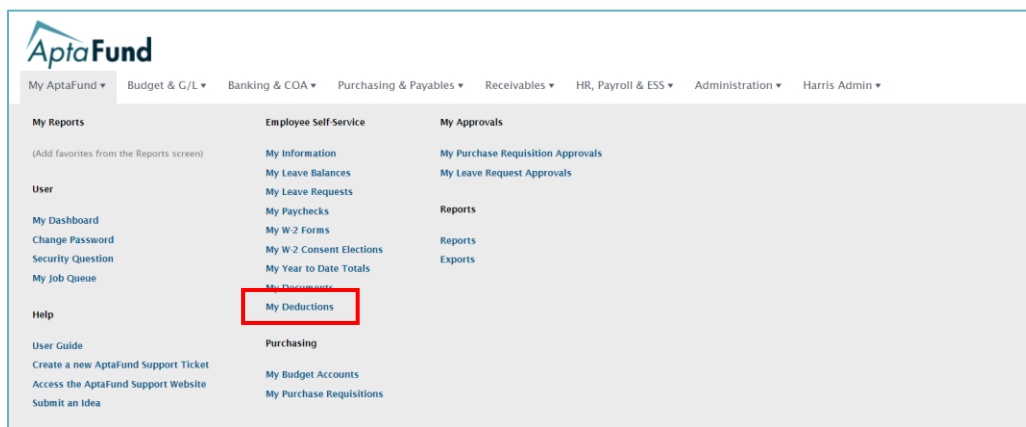


Figure 1: My AptaFund Menu Showing the New My Deductions Option

On the screen shown below, click on **New Federal W-4** to display, populate and submit the new W-4 form. From this screen W-4s can be viewed, deleted, or printed.

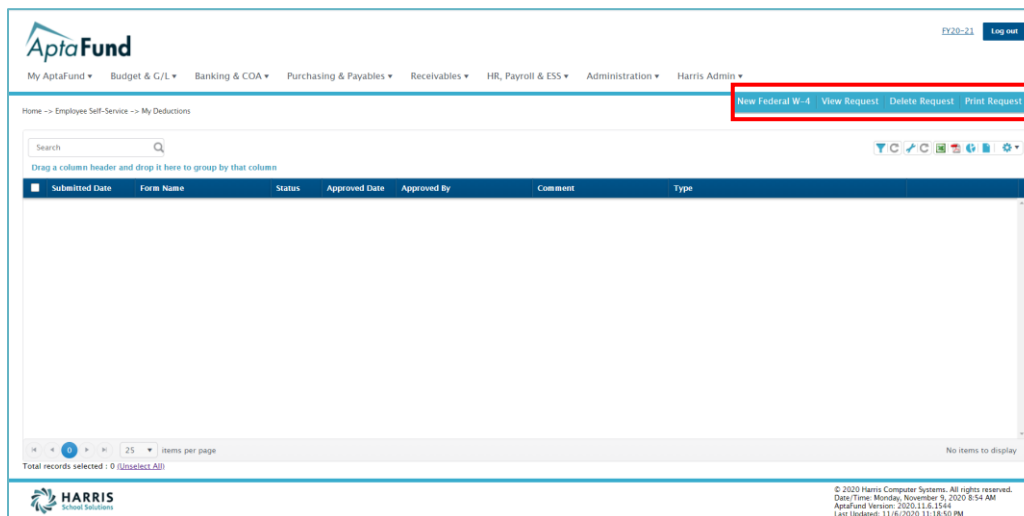


Figure 2: My Deductions Screen



Make Changes to the W-4 Form and Submit the New W-4 Form

Make the necessary changes to the W-4 form, and click **Submit**. Employees can print the form after submitting.

The screenshot shows the 'Federal Withholding' window with the 'Form W-4 Employee's Withholding Certificate' for 2020. The form is partially filled out with the following information:

- Step 1: Enter Personal Information**
 - (a) First name and middle initial: Chris Z
 - Last name: Henderson
 - Address: 45885 SW Rainbow ST, Los Angeles, VT 05652
 - (c) Filing status: Single or Married filing separately, Married filing jointly (or Qualifying widower), Head of household (checked)
- Step 2: Multiple Jobs or Spouse Works**
 - (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**
 - If your income will be \$200,000 or less (\$400,000 or less if married filing jointly):

The 'Submit' button is highlighted with a red box at the bottom left of the form window.

Figure 3: W-4 Form – Ready for Changes

Setup Scheduled Jobs to Email Approvers when Requests are Submitted

Approvers — i.e., Payroll Manager or Administrator, Fund Administrator, or any user who has the Deduction Assignment – Approve permission level — can be notified via email when a W-4 form is submitted by an employee. To configure it, go to **Administration** and click **Scheduled Jobs**, and configure the job called *Employee Deduction Request Reminder Emails*.

The screenshot shows the 'Administration' menu with 'Scheduled Jobs' highlighted in red. The 'New Scheduled Job' configuration page is displayed with the following settings:

- Job Type:** Email
- Job Origin Type:** Employee Deduction Request Reminder Emails
- Start Date:** [Calendar icon]
- End Date:** [Calendar icon]
- Starts at:** 00:00
- Ends at:** 23:59
- Interval Type:** [Dropdown menu]
- Interval:** 1
- Execute on:** Saturday Sunday Monday Tuesday Wednesday Thursday Friday
- Job Description:** [Text area]

Figure 4: Scheduled Job – Employee Deduction Request Reminder Emails

Human Resources > Deduction Change Requests

On the **HR, Payroll & ESS** menu, select **Deduction Change Requests**. Select the employee deduction change request record. **Note:** Only Fund Administrators, Payroll Administrators or Payroll Managers can approve or reject the W-4 Change Requests.

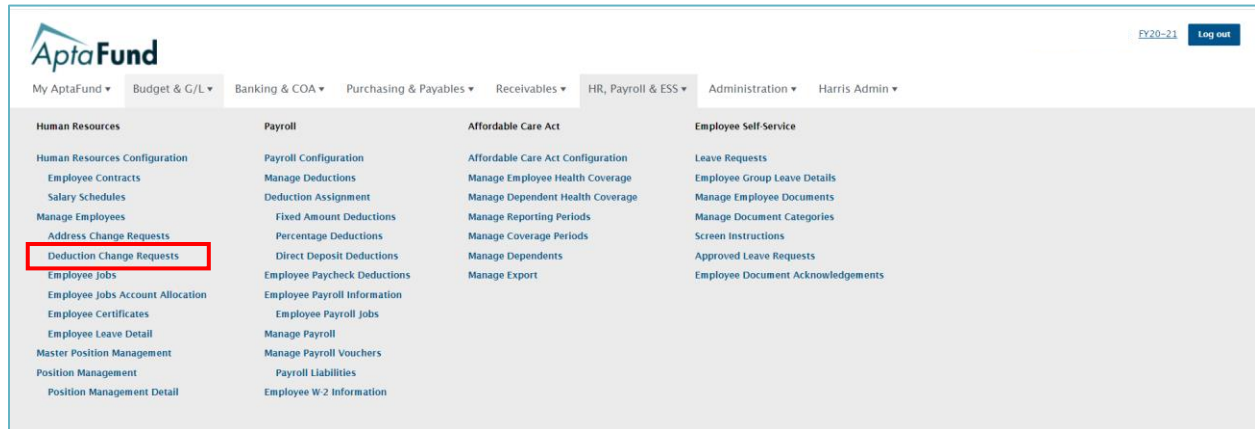


Figure 5: Deduction Change Request

Approve the W-4 Change Request

Click the **Approve** button to approve the W-4 changes. Once the W-4 changes have been approved, the record will disappear from the *Deduction Change Request* screen, and the employee's *New* deduction set will be updated with the changes. AptaFund will approve the deduction set with the new settings automatically.

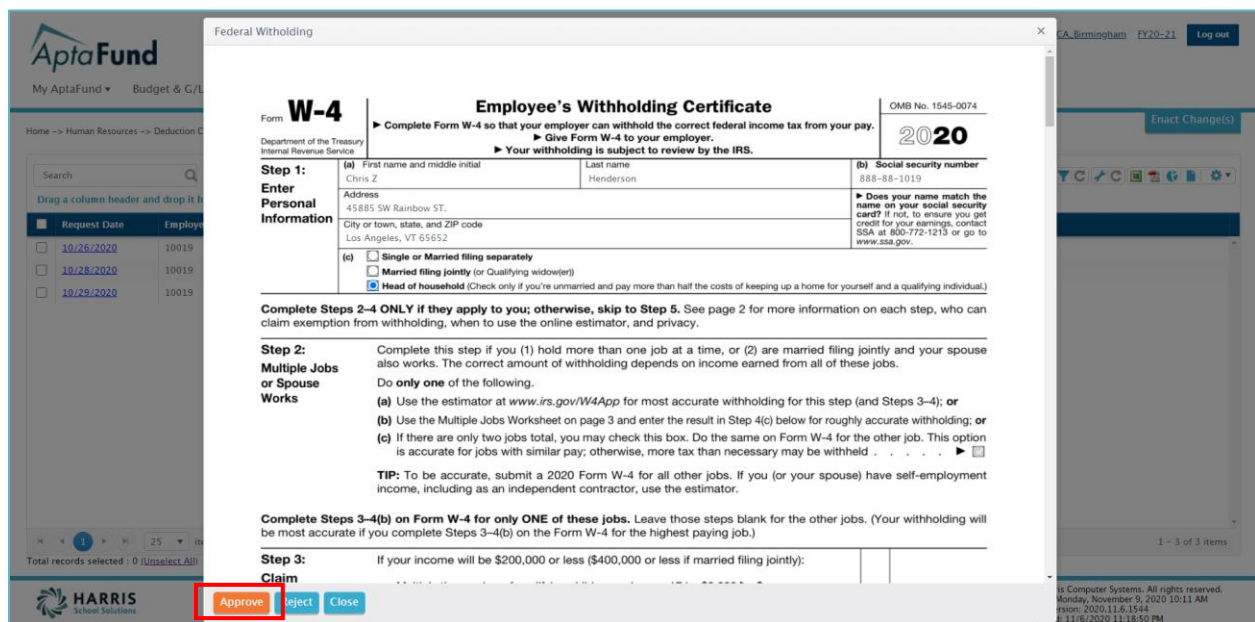


Figure 6: Approving the W-4 Form

Reject the W-4 Change Request

Click on the **Reject** button to reject the W-4 change request. Enter a comment in the Rejection Reason Comment field, then click **OK**. If Reject was selected by mistake, click **Close** in the Rejection Reason popup, and then either select the **Approve** or **Close** button on the W-4 screen.

The screenshot displays the AptaFund Federal Withholding interface. The main form is a 2020 Employee's Withholding Certificate (Form W-4). The user is in the 'Step 1: Enter Personal Information' section. A 'Rejection Reason' popup dialog is open, showing a 'Comment' field with the text 'Missing information in Box E' and 'OK' and 'Close' buttons. The background form shows the following details:

- Form W-4**: Employee's Withholding Certificate, 2020
- Step 1: Enter Personal Information**
- (a) First name and middle initial**: Chris Z
- Last name**: Henderson
- (b) Social security number**: 888-88-1019
- Address**: 45885 SW Rainbow ST, Los Angeles, VT 05652
- (c) Filing 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)
- Buttons**: Approve, Reject, Close

Figure 7: Rejected W-4 Comments

After a W-4 change request is approved or rejected, the employee will get an email explaining what happened.