

2021

PAYROLL

YEAR-END GUIDE



www.prestigepeo.com



PrestigePEOTM

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General Information



Dear Valued Client,

Happy Holidays!! As we approach the end of 2021, we would like to keep you informed of some important dates.



Recording Items on W-2's

All payroll items that need to be recorded on your employees' 2021 W-2 must be submitted to PrestigePEO no later than December 27, 2021 at 12PM EST. Items submitted after this deadline will be subject to late processing/filing fees.

For help in filling out your W2 or if your employees need assistance in doing so, please send them this [instructional video](#).

Payroll items submitted after 12PM EST on Friday, January 7, 2022 will require W-2c's (an amended W-2) to be issued to affected employees and will be subject to late processing/filing fees per W-2c issued.

***PrestigePEO will be closed for the holidays on December 24, 2021 & December 31, 2021.**



Year-End Bonuses

Please provide bonus information with your regular payroll, regardless of the bonus payroll check date. If bonus information cannot be supplied with regular payroll, please submit your bonus payroll at least 4 business days in advance of the requested check date. We ask that you inform your payroll specialist in advance of the check date you would like to issue bonus payrolls.



Payroll Adjustments and Fringe Benefits

Final payroll adjustments or fringe benefits must be reported with or before your last 2021 payroll. Common items include:

- Personal use of company vehicles
- Taxable value of benefits paid by employer for S Corp owners greater than 2%
- Taxable fringe benefits such as employer-paid life insurance exceeding \$50k

If you have questions regarding which fringe benefits should be recorded as W-2 wages, we recommend that you reach out to your Accountant and/or Financial Advisors before submitting to your Payroll Specialist.



Having Employees Review their Personal Information

Now is a great time to have your employees review their personal information to ensure their 2021 W-2's are accurate. They can access the PrestigePRO employee portal on our mobile app or at <https://pea-ep.prismhr.com/#/auth/login> to review:

Names and addresses – employees should confirm their home address and mailing address.

Payroll Tax Withholding processing – employees should confirm that PrestigePEO is withholding federal, state, and local (if applicable) taxes correctly. As always, employees can contact their Payroll Specialist with any questions.

Electronic W-2's – Employees can elect to receive their W-2's directly on the PrestigePRO employee portal. Electronic W-2s will be available faster and help eliminate paper mail. If employees have enrolled previously, they do not need to do so again.



Terminated Employees

We would recommend that you review your list of employees in PrestigePRO and verify that all appropriate termination information has been submitted. Employees who are active or on leave of absence will remain in PrestigePRO.

W-2 Form Breakdown

Interpreting the Income Boxes on the Form W-2

Box 3 - Social Security wages

Earnings paid to the employee that are subject to Social Security tax. (This amount does not include tips.)

Box 1 - Wages, tips, and other compensation

Gross taxable wages paid to the employee (salary, wages, tips, bonuses, and/or commissions).

Box 5 - Medicare wages and tips

Earnings paid to the employee that are subject to Social Security tax. (This amount does not include tips.)

Copy B – To Be Filed With Employee's FEDERAL Tax Return.		41-0852411 OMB No. 1545-0008	
a Employee's soc. sec. no. 123-45-6789	1 Wages, tips, other comp. 50000.00	2 Federal income tax withheld 5000.00	
b Employer ID number (EIN) 12-1234567	3 Social security wages 47000.00	4 Social security tax withheld 3100.00	
	5 Medicare wages and tips 50000.00	6 Medicare tax withheld 725.00	
c Employer's name, address, and ZIP code Company ABC 123 35th St, 6th Ave New York, NY 10018			
d Control number R2D2			
e Employee's name, address, and ZIP code John Smith 456 Example Street New York, NY 10018			
7 Social security tips 3000.00	8 Allocated tips	9	
10 Dependent care benefits	11 Nonqualified plans	12a Code See inst. for box 12	
13 Statutory employee	14 Other	12b Code	
Retirement plan		12c Code	
Third-party sick pay		12d Code	
NY 121234567	15 State Employer's state ID number	16 State wages, tips, etc. 50000.00	17 State income tax 1535.00
18 Local wages, tips, etc. 50000.00	19 Local income tax 750.00	20 Locality name New York	

Form W-2 Wage and Tax Statement 2021
This information is being furnished to the Internal Revenue Service.

Dept. of the Treasury -- IRS
www.irs.gov/efile

Box 7 - Social Security wages

Tips earned by the employee that are subject to Social Security tax. (Box 3 + Box 7 = Box 1)

Box 18 - Local wages, tips, etc.

Gross taxable wages paid to the employee that are subject to local tax (might not equal Box 1)

Box 16 - State wages, tips, etc.

Gross taxable wages paid to the employee that are subject to the state's tax (might not equal Box 1).

Form W-2 versus Final Pay Stub

Understanding the difference between a final pay stub and Form W-2 is important. When employees receive their W-2, they might notice the earnings on their last paycheck stub are different from the reported earnings on their W-2.

Typically, this is attributed to one of three different scenarios:

- **The company offers health insurance that is a pre-tax deduction.**

This is the most common reason for the employee's pay stub earnings to be different from those on the Form W-2. If the employee participated in the company's pre-tax health insurance, the taxable wages in Boxes 1, 3, 5, 16 and 18 will be lower than the amount of the pre-tax health insurance deduction. Pre-tax deductions lower the gross wages by the annual amount of the deduction.

Example: Jane's gross wages are \$30,000, but during the year she contributed \$3,000 to a pre-tax health insurance deduction. Jane's taxable Form W-2 wages are 27,000. ($30,000 - 3,000 = 27,000$)

- **Participation in a company-sponsored retirement plan.**

These types of plans, such as a 401(k), reduce only the taxable federal and state and local wages. It does not reduce Social Security and Medicare taxable. Those amounts are reported in Boxes 1 and 16 and 18 (if applicable).

Example: Sondra's gross wages are \$30,000, but over the course of the year she contributed \$2,500 towards her 401(k) retirement. Sondra's federal and state Form W-2 wages are \$27,500. ($30,000 - 2,500 = 27,500$)

- **Earnings include non-taxable income items:**

Non-taxable income can include reimbursement for mileage or other non-taxable expenses the employee incurred that were reimbursed to the employee in a payroll. As a result, the gross wages on the employee's pay stub often differ from the Boxes 1, 3, 5, 16 and 18 wages on the Form W-2 because the non-taxable item lowers the gross taxable wages.

Example: Maurice's gross wages are \$30,000, but over the course of the year he received \$2,000 towards a non-taxed car allowance. Maurice's taxable Form W-2 wages are \$28,000. ($30,000 - 2,000 = 28,000$)

W-4 Form Breakdown

W-4 Form Breakdown

You have three (3) options to choose from when accounting for multiple jobs

You can have an additional withholding to account for another job

Form W-4 (Rev. December 2020) Department of the Treasury Internal Revenue Service		Employee's Withholding Certificate		OMB No. 1545-0074
		<p>▶ Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay.</p> <p>▶ Give Form W-4 to your employer.</p> <p>▶ Your withholding is subject to review by the IRS.</p>		<p>2021</p>
Step 1: Enter Personal Information	<p>(a) First name and middle initial _____ Last name _____</p> <p>Address _____</p> <p>City or town, state, and ZIP code _____</p>		<p>(b) Social security number _____</p> <p>▶ 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 www.ssa.gov.</p>	
<p>(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.)</p>				
<p>Complete Steps 2-4 ONLY if they apply to you; otherwise, skip to Step 5. See page 2 for more information on each step, who can claim exemption from withholding, when to use the estimator at www.irs.gov/W4App, and privacy.</p>				
Step 2: Multiple Jobs or Spouse Works	<p>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.</p> <p>Do only one of the following.</p> <p>(a) Use the estimator at www.irs.gov/W4App for most accurate withholding for this step (and Steps 3-4); or</p> <p>(b) Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below for roughly accurate withholding; or</p> <p>(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. ▶ <input type="checkbox"/></p> <p>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.</p>			
<p>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 be most accurate if you complete Steps 3-4(b) on the Form W-4 for the highest paying job.)</p>				
Step 3: Claim Dependents	<p>If your total income will be \$200,000 or less (\$400,000 or less if married filing jointly):</p> <p>Multiply the number of qualifying children under age 17 by \$2,000 ▶ \$ _____</p> <p>Multiply the number of other dependents by \$500 ▶ \$ _____</p> <p>Add the amounts above and enter the total here 3 \$ _____</p>			
Step 4 (optional): Other Adjustments	<p>(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) \$ _____</p> <p>(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) \$ _____</p> <p>(c) Extra withholding. Enter any additional tax you want withheld each pay period 4(c) \$ _____</p>			
Step 5: Sign Here	<p>Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.</p> <p>▶ Employee's signature (This form is not valid unless you sign it.) _____ ▶ Date _____</p>			
Employers Only	Employer's name and address _____		First date of employment _____	Employer identification number (EIN) _____
For Privacy Act and Paperwork Reduction Act Notice, see page 3.		Cat. No. 10220Q		Form W-4 (2021)

Instead of claiming allowances, you can claim dependents, other income, and deductions for accurate withholding.

Please note: Allowances (pre-2020) and dependents are not the same. For example, a filing status of single with 2 allowances is not the same as a filing status of single with \$1,000 or \$4,000 in dependents. Your Accountant or Tax Professional can help you calculate the equivalent.

Updating IRS Form W-4 Through Your Employee Self-Service (ESS) Portal

What is IRS Form W-4?

Form W-4, also known as the Employee's Withholding Certificate, is an IRS form that employees use to help their employer determine how much Federal Income Tax to withhold from each paycheck.

Effective January 1st, 2020, the IRS released a new format of the Form W-4, no longer allowing employees to claim allowances. The various tax changes of the 2017 Tax Cuts and Jobs Act ultimately prompted the IRS to redesign the form.

Completing IRS Form W-4

To login to the Employee Self-Service Portal, go to <https://pea-ep.prismhr.com>

You may also use the PrestigeGO mobile app on your iPhone or Android.

Step 1

1. From your ESS Dashboard, click **Taxes**
2. Under Taxes, click **Tax Withholding**

Your current Federal and State (if applicable) tax information will appear

3. Click **Update Forms** to change your current withholding

The screenshot shows the 'Tax Withholding' page. On the left is a navigation menu with 'Taxes' expanded and 'Tax Withholding' selected. The main content area is titled 'Tax Withholding' and contains sections for 'Federal Tax' and 'NY State Tax - Resident'. The 'Federal Tax' section shows 'Additional Withholding (per paycheck)' as \$200.00 and 'Allowance' as 0. The 'NY State Tax - Resident' section shows 'Filing Status' as 'Married'. A red box with a '3' highlights the 'Update Forms' button in the top right corner. Red circles with numbers '1' and '2' highlight the 'Filing Status' dropdown and the 'Filing Status' text respectively.

Step 2

1. Click **Start** to enter the Employee Withholding Resource Center

The screenshot shows the 'Employee Withholding Resource Center' page. The page has a header 'Employee Withholding Resource Center' and a sub-header 'The assistant can guide you to the correct forms. You can also choose which forms you would like to fill out if you're certain.' A red box with a '1' highlights the 'Start' button.

Step 3

1. Select which sections you would like to complete
2. Click Continue

The screenshot shows the section selection page. It has a header 'Please select which sections you would like to complete:' and a note: 'Note: Opting out of jurisdictions, to which you may be liable, may result in not enough taxes from being withheld or your employer to withhold at a higher rate.' There are two sections: 'Federal' and 'New York Resident'. Each section has two radio buttons: 'I wish to complete forms for this jurisdiction. Please help determine which withholding forms apply to me' and 'I wish to NOT complete forms for this jurisdiction at this time'. A red box with a '1' highlights the 'Federal' section. A red box with a '2' highlights the 'Continue' button at the bottom.

Step 4

1. Complete the Survey
2. Click **Next** to continue

The screenshot shows the 'Federal — Survey' screen. On the left is a navigation menu with 'Tax Withholding' selected. The main content area has a 'Select one' section with three radio button options: 'Foreign Earned Income Exclusion - I expect to qualify for the foreign earned income exclusion under either the bona fide residence or physical presence test for calendar year or other tax year', 'Nonresident Alien - I am exempt from withholding on compensation for independent (or eligible dependent) personal services of a Nonresident Alien Individual, see instructions for Form 8233', and 'Quiero continuar en Español'. Below these options are 'Back' and 'Next' buttons. Red callout boxes with numbers 1 and 2 highlight the 'Select one' section and the 'Next' button, respectively.

Step 5

1. To begin the tax form, click **Start**

The screenshot shows the 'Federal — Summary' screen. On the left is a navigation menu with 'Tax Withholding' selected. The main content area displays a summary table with columns: Locality, Name, Title, and Status. The table contains one row: 'FEDERAL', 'W-4', 'Employee's Withholding Certificate', and 'Not completed'. A red box with a number 1 highlights the 'Start' button located below the table. A 'Back' button is also visible.

Step 6

1. Complete the Nonresident Alien survey
2. Click **Next**

The screenshot shows the 'Federal — Employee's Withholding Certificate — W-4' screen. On the left is a navigation menu with 'Tax Withholding' selected. The main content area has a 'Are you a nonresident alien?' section with two radio button options: 'Yes' and 'No'. Below these options is a note: 'Selecting Yes will result in selecting a marital status of Single or Married filing separately regardless of actual marital status. See Notice 1392 for more details. Note: Nonresident aliens may be exempt from wage withholding on part or all of their compensation for dependent personal services under an income tax treaty. If you are claiming a tax treaty withholding exemption, do not complete Form W-4. Instead, complete Form 8233, Exemption from Withholding on Compensation for Independent (and Certain Dependent) Personal Services of a Nonresident Alien Individual, and attach it to each withholding agent from whom amounts will be received.' Below the note are 'Back' and 'Next' buttons. Red callout boxes with numbers 1 and 2 highlight the 'Are you a nonresident alien?' section and the 'Next' button, respectively.

Step 7

1. Determine if you are exempt or not exempt from withholding

Please note: If you are exempt, skip to Step 12 where you can review and submit the form

2. Click **Next**

Step 8

1. Select a filing status

2. Click **Next**

Step 9

1. Based on the criteria, select one of the three options

Please note: Option 1 has a couple of steps that need to be completed before proceeding to the next part of the document

2. Click **Next**

Home | Tax Withholding

Federal - Employee's Withholding Certificate - W-4

Wizard | Form and Instructions

Check my progress 1

Nonresident Alien

Exemption

Filing Status

Step 2 Survey

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.

Select one

☐ I want to use the worksheet to calculate roughly accurate withholding

☐ There are only two jobs total. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld

☐ None of the above

Back Next 2

Option 1 - I want to use the worksheet to calculate roughly accurate withholding

1. Select two (2) or three (3) jobs

2. Click **Next**

Home | Tax Withholding

Federal - Employee's Withholding Certificate - W-4

Wizard | Form and Instructions

Check my progress 1

Nonresident Alien

Exemption

Filing Status

Step 2 Survey

Multiple Jobs Worksheet Survey - Step 2b

Multiple jobs worksheet, select one

☐ Two (2) jobs

☐ Three (3) jobs

Back Next 2

Option 1 (continued)

1. Use the worksheet to compute an estimate withholding
2. For two (2) jobs, enter the information in boxes 1 and 3; box 4 will auto-calculate for you
3. Click **Next**

Home **Tax Withholding**

Check my progress

Personal >

Benefits >

Pay >

Paid Time Off >

Documents >

Events >

Taxes >

Tax Withholding

W-2

1095-C

Mobile App

Kronos SSO Dev

MetLife SSO Dev

MetLife

Time & Attendance

PayFit

If you choose the option in Step 2(b) on Form W-4, complete this worksheet (which calculates the total extra tax for all jobs) on only ONE Form W-4. Withholding will be most accurate if you complete the worksheet and enter the result on the Form W-4 for the highest paying job.

If more than one job has annual wages of more than \$120,000 or there are more than three jobs, see Publication 505.

Page 4 Taxable Wage and Salary Tables

Single or Married Filing Separately

Higher Paying Job Annual Taxable Wage & Salary	\$0 -	\$10,000 -	\$20,000 -	\$30,000 -	\$40,000 -	\$50,000 -	\$75,000 -	\$100,000 -	\$120,000 -	\$140,000 -	\$160,000 -	\$180,000 -	\$200,000 -	\$250,000 -	\$300,000 -	\$350,000 -	\$400,000 -	\$450,000 -	\$500,000 -	\$550,000 -	\$600,000 -	\$650,000 -	\$700,000 -	\$750,000 -	\$800,000 -	\$850,000 -	\$900,000 -	\$950,000 -	\$1,000,000 -	\$1,050,000 -	\$1,100,000 -	\$1,150,000 -	\$1,200,000 -																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																															
\$0 -	\$0.00	\$440	\$880	\$1,320	\$1,760	\$2,200	\$2,640	\$3,080	\$3,520	\$3,960	\$4,400	\$4,840	\$5,280	\$5,720	\$6,160	\$6,600	\$7,040	\$7,480	\$7,920	\$8,360	\$8,800	\$9,240	\$9,680	\$10,120	\$10,560	\$11,000	\$11,440	\$11,880	\$12,320	\$12,760	\$13,200	\$13,640	\$14,080	\$14,520	\$14,960	\$15,400	\$15,840	\$16,280	\$16,720	\$17,160	\$17,600	\$18,040	\$18,480	\$18,920	\$19,360	\$19,800	\$20,240	\$20,680	\$21,120	\$21,560	\$22,000	\$22,440	\$22,880	\$23,320	\$23,760	\$24,200	\$24,640	\$25,080	\$25,520	\$25,960	\$26,400	\$26,840	\$27,280	\$27,720	\$28,160	\$28,600	\$29,040	\$29,480	\$29,920	\$30,360	\$30,800	\$31,240	\$31,680	\$32,120	\$32,560	\$33,000	\$33,440	\$33,880	\$34,320	\$34,760	\$35,200	\$35,640	\$36,080	\$36,520	\$36,960	\$37,400	\$37,840	\$38,280	\$38,720	\$39,160	\$39,600	\$40,040	\$40,480	\$40,920	\$41,360	\$41,800	\$42,240	\$42,680	\$43,120	\$43,560	\$44,000	\$44,440	\$44,880	\$45,320	\$45,760	\$46,200	\$46,640	\$47,080	\$47,520	\$47,960	\$48,400	\$48,840	\$49,280	\$49,720	\$50,160	\$50,600	\$51,040	\$51,480	\$51,920	\$52,360	\$52,800	\$53,240	\$53,680	\$54,120	\$54,560	\$55,000	\$55,440	\$55,880	\$56,320	\$56,760	\$57,200	\$57,640	\$58,080	\$58,520	\$58,960	\$59,400	\$59,840	\$60,280	\$60,720	\$61,160	\$61,600	\$62,040	\$62,480	\$62,920	\$63,360	\$63,800	\$64,240	\$64,680	\$65,120	\$65,560	\$66,000	\$66,440	\$66,880	\$67,320	\$67,760	\$68,200	\$68,640	\$69,080	\$69,520	\$69,960	\$70,400	\$70,840	\$71,280	\$71,720	\$72,160	\$72,600	\$73,040	\$73,480	\$73,920	\$74,360	\$74,800	\$75,240	\$75,680	\$76,120	\$76,560	\$77,000	\$77,440	\$77,880	\$78,320	\$78,760	\$79,200	\$79,640	\$80,080	\$80,520	\$80,960	\$81,400	\$81,840	\$82,280	\$82,720	\$83,160	\$83,600	\$84,040	\$84,480	\$84,920	\$85,360	\$85,800	\$86,240	\$86,680	\$87,120	\$87,560	\$88,000	\$88,440	\$88,880	\$89,320	\$89,760	\$90,200	\$90,640	\$91,080	\$91,520	\$91,960	\$92,400	\$92,840	\$93,280	\$93,720	\$94,160	\$94,600	\$95,040	\$95,480	\$95,920	\$96,360	\$96,800	\$97,240	\$97,680	\$98,120	\$98,560	\$99,000	\$99,440	\$99,880	\$100,320	\$100,760	\$101,200	\$101,640	\$102,080	\$102,520	\$102,960	\$103,400	\$103,840	\$104,280	\$104,720	\$105,160	\$105,600	\$106,040	\$106,480	\$106,920	\$107,360	\$107,800	\$108,240	\$108,680	\$109,120	\$109,560	\$110,000	\$110,440	\$110,880	\$111,320	\$111,760	\$112,200	\$112,640	\$113,080	\$113,520	\$113,960	\$114,400	\$114,840	\$115,280	\$115,720	\$116,160	\$116,600	\$117,040	\$117,480	\$117,920	\$118,360	\$118,800	\$119,240	\$119,680	\$120,120	\$120,560	\$121,000	\$121,440	\$121,880	\$122,320	\$122,760	\$123,200	\$123,640	\$124,080	\$124,520	\$124,960	\$125,400	\$125,840	\$126,280	\$126,720	\$127,160	\$127,600	\$128,040	\$128,480	\$128,920	\$129,360	\$129,800	\$130,240	\$130,680	\$131,120	\$131,560	\$132,000	\$132,440	\$132,880	\$133,320	\$133,760	\$134,200	\$134,640	\$135,080	\$135,520	\$135,960	\$136,400	\$136,840	\$137,280	\$137,720	\$138,160	\$138,600	\$139,040	\$139,480	\$139,920	\$140,360	\$140,800	\$141,240	\$141,680	\$142,120	\$142,560	\$143,000	\$143,440	\$143,880	\$144,320	\$144,760	\$145,200	\$145,640	\$146,080	\$146,520	\$146,960	\$147,400	\$147,840	\$148,280	\$148,720	\$149,160	\$149,600	\$150,040	\$150,480	\$150,920	\$151,360	\$151,800	\$152,240	\$152,680	\$153,120	\$153,560	\$154,000	\$154,440	\$154,880	\$155,320	\$155,760	\$156,200	\$156,640	\$157,080	\$157,520	\$157,960	\$158,400	\$158,840	\$159,280	\$159,720	\$160,160	\$160,600	\$161,040	\$161,480	\$161,920	\$162,360	\$162,800	\$163,240	\$163,680	\$164,120	\$164,560	\$165,000	\$165,440	\$165,880	\$166,320	\$166,760	\$167,200	\$167,640	\$168,080	\$168,520	\$168,960	\$169,400	\$169,840	\$170,280	\$170,720	\$171,160	\$171,600	\$172,040	\$172,480	\$172,920	\$173,360	\$173,800	\$174,240	\$174,680	\$175,120	\$175,560	\$176,000	\$176,440	\$176,880	\$177,320	\$177,760	\$178,200	\$178,640	\$179,080	\$179,520	\$180,000	\$180,440	\$180,880	\$181,320	\$181,760	\$182,200	\$182,640	\$183,080	\$183,520	\$183,960	\$184,400	\$184,840	\$185,280	\$185,720	\$186,160	\$186,600	\$187,040	\$187,480	\$187,920	\$188,360	\$188,800	\$189,240	\$189,680	\$190,120	\$190,560	\$191,000	\$191,440	\$191,880	\$192,320	\$192,760	\$193,200	\$193,640	\$194,080	\$194,520	\$194,960	\$195,400	\$195,840	\$196,280	\$196,720	\$197,160	\$197,600	\$198,040	\$198,480	\$198,920	\$199,360	\$199,800	\$200,240	\$200,680	\$201,120	\$201,560	\$202,000	\$202,440	\$202,880	\$203,320	\$203,760	\$204,200	\$204,640	\$205,080	\$205,520	\$205,960	\$206,400	\$206,840	\$207,280	\$207,720	\$208,160	\$208,600	\$209,040	\$209,480	\$209,920	\$210,360	\$210,800	\$211,240	\$211,680	\$212,120	\$212,560	\$213,000	\$213,440	\$213,880	\$214,320	\$214,760	\$215,200	\$215,640	\$216,080	\$216,520	\$216,960	\$217,400	\$217,840	\$218,280	\$218,720	\$219,160	\$219,600	\$220,040	\$220,480	\$220,920	\$221,360	\$221,800	\$222,240	\$222,680	\$223,120	\$223,560	\$224,000	\$224,440	\$224,880	\$225,320	\$225,760	\$226,200	\$226,640	\$227,080	\$227,520	\$227,960	\$228,400	\$228,840	\$229,280	\$229,720	\$230,160	\$230,600	\$231,040	\$231,480	\$231,920	\$232,360	\$232,800	\$233,240	\$233,680	\$234,120	\$234,560	\$235,000	\$235,440	\$235,880	\$236,320	\$236,760	\$237,200	\$237,640	\$238,080	\$238,520	\$238,960	\$239,400	\$239,840	\$240,280	\$240,720	\$241,160	\$241,600	\$242,040	\$242,480	\$242,920	\$243,360	\$243,800	\$244,240	\$244,680	\$245,120	\$245,560	\$246,000	\$246,440	\$246,880	\$247,320	\$247,760	\$248,200	\$248,640	\$249,080	\$249,520	\$249,960	\$250,400	\$250,840	\$251,280	\$251,720	\$252,160	\$252,600	\$253,040	\$253,480	\$253,920	\$254,360	\$254,800	\$255,240	\$255,680	\$256,120	\$256,560	\$257,000	\$257,440	\$257,880	\$258,320	\$258,760	\$259,200	\$259,640	\$260,080	\$260,520	\$260,960	\$261,400	\$261,840	\$262,280	\$262,720	\$263,160	\$263,600	\$264,040	\$264,480	\$264,920	\$265,360	\$265,800	\$266,240	\$266,680	\$267,120	\$267,560	\$268,000	\$268,440	\$268,880	\$269,320	\$269,760	\$270,200	\$270,640	\$271,080	\$271,520	\$271,960	\$272,400	\$272,840	\$273,280	\$273,720	\$274,160	\$274,600	\$275,040	\$275,480	\$275,920	\$276,360	\$276,800	\$277,240	\$277,680	\$278,120	\$278,560	\$279,000	\$279,440	\$279,880	\$280,320	\$280,760	\$281,200	\$281,640	\$282,080	\$282,520	\$282,960	\$283,400	\$283,840	\$284,280	\$284,720	\$285,160	\$285,600	\$286,040	\$286,480	\$286,920	\$287,360	\$287,800	\$288,240	\$288,680	\$289,120	\$289,560	\$290,000	\$290,440	\$290,880	\$291,320	\$291,760	\$292,200	\$292,640	\$293,080	\$293,520	\$293,960	\$294,400	\$294,840	\$295,280	\$295,720	\$296,160	\$296,600	\$297,040	\$297,480	\$297,920	\$298,360	\$298,800	\$299,240	\$299,680	\$300,120	\$300,560	\$301,000	\$301,440	\$301,880	\$302,320	\$302,760	\$303,200	\$303,640	\$304,080	\$304,520	\$304,960	\$305,400	\$305,840	\$306,280	\$306,720	\$307,160	\$307,600	\$308,040	\$308,480	\$308,920	\$309,360	\$309,800	\$310,240	\$310,680	\$311,120	\$311,560	\$312,000	\$312,440	\$312,880	\$313,320	\$313,760	\$314,200	\$314,640	\$315,080	\$315,520	\$315,960	\$316,400	\$316,840	\$317,280	\$317,720	\$318,160	\$318,600	\$319,040	\$319,480	\$319,920	\$320,360	\$320,800	\$321,240	\$321,680	\$322,120	\$322,560	\$323,000	\$323,440	\$323,880	\$324,320	\$324,760	\$325,200	\$325,640	\$326,080	\$326,520	\$326,960	\$327,400	\$327,840	\$328,280	\$328,720	\$329,160	\$329,600	\$330,040	\$330,480	\$330,920	\$331,360	\$331,800	\$332,240	\$332,680	\$333,120	\$333,560	\$334,000	\$334,440	\$334,880	\$335,320	\$335,760	\$336,200	\$336,640	\$337,080	\$337,520	\$337,960	\$338,400	\$338,840	\$339,280	\$339,720	\$340,160	\$340,600	\$341,040	\$341,480	\$341,920	\$342,360	\$342,800	\$343,240	\$343,680	\$344,120	\$344,560	\$345,000	\$345,440	\$345,880	\$346,320	\$346,760	\$347,200	\$347,640	\$348,080	\$348,520	\$348,960	\$349,400	\$349,840	\$350,280	\$350,720	\$351,160	\$351,600	\$352,040	\$352,480	\$352,920	\$353,360	\$353,800	\$354,240	\$354,680	\$355,120	\$355,560	\$356,000	\$356,440	\$356,880	\$357,320	\$357,760	\$358,200	\$358,640	\$359,080	\$359,520	\$360,000	\$360,440	\$360,880	\$361,320	\$361,760	\$362,200	\$362,640	\$363,080	\$363,520	\$363,960	\$364,400	\$364,840	\$365,280	\$365,720	\$366,160	\$366,600	\$367,040	\$367,480	\$367,920	\$368,360	\$368,800	\$369,240	\$369,680	\$370,120	\$370,560	\$371,000	\$371,440	\$371,880	\$372,320	\$372,760	\$373,200	\$373,640	\$374,080	\$374,520	\$374,960	\$375,400	\$375,840	\$376,280	\$376,720	\$377,160	\$377,600	\$378,040	\$378,480	\$378,920	\$379,360	\$379,800	\$380,240	\$380,680	\$381,120	\$381,560	\$382,000	\$382,440	\$382,880	\$383,320	\$383,760	\$384,200	\$384,640	\$385,080	\$385,520	\$385,960	\$386,400	\$386,840	\$387,280	\$387,720	\$388,160	\$388,600	\$389,040	\$389,480	\$389,920	\$390,360	\$390,800	\$391,240	\$391,680	\$392,120	\$392,560	\$393,000	\$393,440	\$3

Step 10

1. Determine if you would like to claim any dependents
2. Click **Next**

The screenshot shows the 'Check my progress' step of the W-4 wizard. On the left, a sidebar lists various HR and tax options, with 'Tax Withholding' selected. The main content area has a breadcrumb trail: 'Federal - Employee's Withholding Certificate - W-4'. Below this, there are tabs for 'Wizard' and 'Form and Instructions'. A progress bar shows 'Check my progress' as the current step, marked with a red circle and the number 1. Below the progress bar, there are several steps listed: 'Nonresident Alien', 'Exemption', 'Filing Status', 'Step 2 Survey', and 'Dependents survey - Step 3'. The 'Dependents survey - Step 3' step is highlighted in blue. To the right of the progress bar, there is a red-bordered box containing the question 'Would you like to claim any dependents?' with radio buttons for 'Yes' and 'No'. Below this, it lists conditions for the child tax credit: 'To qualify for the child tax credit, the child must meet the all of following conditions' followed by a bulleted list: 'be under age 17 as of December 31', 'be your dependent who lives with you for more than half the year', and 'have a valid social security number'. It also mentions 'You also can include other tax credits, such as education tax credits and the foreign tax credit.' At the bottom of the red-bordered box, there are 'Back' and 'Next' buttons. The 'Next' button is highlighted with a red circle and the number 2.

4. If you are claiming dependents, complete these three (3) steps
5. Click **Next**

The screenshot shows the 'Dependents survey - Step 3' form. The sidebar on the left is the same as in the previous screenshot. The main content area has the same breadcrumb trail. Below the breadcrumb trail, there are tabs for 'Wizard' and 'Form and Instructions'. The progress bar shows 'Dependents survey - Step 3' as the current step, marked with a red circle and the number 1. Below the progress bar, there are several steps listed: 'Nonresident Alien', 'Exemption', 'Filing Status', 'Step 2 Survey', 'Dependents survey - Step 3', and 'Step 3'. The 'Step 3' step is highlighted in blue. To the right of the progress bar, there is a red-bordered box containing the following fields: 'Number of dependents under the age of 17' (with a text input field), 'Number of other dependents' (with a text input field), and 'Other tax credits (such as education tax credits and the foreign tax credit)' (with a text input field). At the bottom of the red-bordered box, there are 'Back' and 'Next' buttons. The 'Next' button is highlighted with a red circle and the number 2.

Step 11

1. Determine if you would like to include other income (not from a job), deductions, and extra withholding
2. Click **Next**

Home > Tax Withholding

Federal - Employee's Withholding Certificate - W-4

Wizard Form and Instructions

Check my progress 1

Nonresident Alien

Exemption

Filing Status

Step 2 Survey

Dependents survey - Step 3

Other Adjustments Survey (Optional) - Step 4

Would you like to complete step 4 (Other Adjustments) for other income, deductions, and extra withholding? This step is optional.

☐ Yes

☐ No

Back Next > 2

4. If you are including other income, deductions, or extra withholding, complete these steps
5. Click **Next**

Home > Tax Withholding

Federal - Employee's Withholding Certificate - W-4

Wizard Form and Instructions

Check my progress 4

Nonresident Alien

Exemption

Filing Status

Step 2 Survey

Dependents survey - Step 3

Other Adjustments Survey (Optional) - Step 4

Step 4

4a. If you want tax withheld for other income you expect this year that will not have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income.

\$

4b. Select one

☐ I expect to claim deductions other than the standard deduction and want to reduce my withholding

☐ I will claim the standard deduction

4c. Enter any additional amount you want withheld each pay period

\$

Back Next > 5

6. If you expect to claim deductions other than the standard deduction and want to reduce your withholding, complete these steps
7. Click **Next**

Step 12

- Review the form for accuracy
- Print/Save a copy for your records
- When ready to submit, check the box
- Click **Submit Form**

Thank you in advance for your cooperation as we approach the end of 2021. We always appreciate the opportunity to offer you and your employees personalized one-on-one service. If you have any questions, please feel free to reach out to your dedicated Payroll Specialist.

Best Regards,



Joey McCormick

Director of Payroll



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