Employee's Withholding Certificate

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.

OMB No. 1545-0074

| Department of the Treasury Give Form W-4 to your employer. | | | | | | | | |
|---|---------|--|---------------------------------------|-----------------------------|-----------|---|--|--|
| Internal Revenue Se | | | g is subject to review by the IF | RS. | | | | |
| Step 1: | (a) Fir | st name and middle initial | Last name | | (b) S | ocial security number | | |
| - | | | | | | | | |
| Enter | Addres | s | | | | your name match the | | |
| Personal | | | | | | on your social security If not, to ensure you get | | |
| Information | City or | town, state, and ZIP code | | | credit | for your earnings, | | |
| | | | | | | ct SSA at 800-772-1213 to www.ssa.gov. | | |
| | (0) | Single or Married filing separately | | | oi go | | | |
| | (c) L | | | | | | | |
| | - | Married filing jointly or Qualifying surviving s ∴ ∴ ∴ ∴ ∴ ∴ ∴ | | | | | | |
| | | Head of household (Check only if you're unman | ried and pay more than half the costs | of keeping up a nome for yo | ourseit a | na a qualitying individual.) | | |
| | | ONLY if they apply to you; otherwis n withholding, other details, and privac | | 2 for more information | n on e | ach step, who can | | |
| Step 2: | | Complete this step if you (1) hold more | e than one job at a time, or (2 | 2) are married filing jo | intly a | nd your spouse | | |
| Multiple Job | 16 | also works. The correct amount of wit | | | | | | |
| or Spouse | ,, | Do only one of the following. | | | | | | |
| Works | | _ | | | | | | |
| WOIKS | | (a) Reserved for future use. | | | | | | |
| | | (b) Use the Multiple Jobs Worksheet of | on page 3 and enter the resu | It in Step 4(c) below; | or | | | |
| | | (c) If there are only two jobs total, you | | | | | | |
| | | option is generally more accurate | than (b) if pay at the lower pa | aying job is more than | half o | f the pay at the | | |
| | | higher paying job. Otherwise, (b) is | more accurate | | | | | |
| | | TIP: If you have self-employment inco | me, see page 2. | | | | | |
| Complete Ste | ns 3–4 | (b) on Form W-4 for only ONE of the | se inhs . Leave those stens l | olank for the other ion | ns (Yo | ur withholding will | | |
| be most accur | | ou complete Steps 3–4(b) on the Form | | | J. (10 | | | |
| Step 3: | | If your total income will be \$200,000 c | r less (\$400,000 or less if ma | arried filing jointly): | | | | |
| Claim | | Multiply the number of qualifying c | hildren under age 17 by \$2,0 | 00 \$ | _ | | | |
| Dependent and Other | | Multiply the number of other depe | ndents by \$500 | . \$ | - | | | |
| Credits | | Add the amounts above for qualifying | children and other depende | ents. You may add to | | | | |
| | | this the amount of any other credits. E | Inter the total here | | 3 | \$ | | |
| Step 4 | | (a) Other income (not from jobs). | If you want tax withheld f | or other income vol | | | | |
| (optional): | | expect this year that won't have w | | | | | | |
| | | This may include interest, dividend | _ | | 4(a |) \$ | | |
| Other | | . ,, | | | - (- | , , , | | |
| Adjustments | S | (b) Deductions. If you expect to claim | deductions other than the st | andard deduction and | l t | | | |
| | | want to reduce your withholding, u | se the Deductions Workshee | t on page 3 and ente | r | | | |
| | | the result here | | | 4(b |) \$ | | |
| | | | | | | | | |
| | | (c) Extra withholding. Enter any addit | ional tax you want withheld e | each pay period | 4(c |) \$ | | |
| | | | | | | | | |
| | | | | | | | | |
| Step 5: | Under | penalties of perjury, I declare that this certi | ficate, to the best of my knowled | dge and belief, is true, c | orrect, | and complete. | | |
| Sign | | | | | | | | |
| Here | | | | | | | | |
| | Emp | sloyee's signature (This form is not va | lid unless you sign it.) | Da | ite | | | |
| Employers | Emplo | yer's name and address | | First date of | Emplo | yer identification | | |
| Only | | ylvania Western University | | employment | | umber (EIN) | | |
| - ····y | | , | | | | | | |
| | | | | | | | | |

Form W-4 (2023)

General Instructions

Section references are to the Internal Revenue Code.

Future Developments

For the latest information about developments related to Form W-4, such as legislation enacted after it was published, go to www.irs.gov/FormW4.

Purpose of Form

Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. If too little is withheld, you will generally owe tax when you file your tax return and may owe a penalty. If too much is withheld, you will generally be due a refund. Complete a new Form W-4 when changes to your personal or financial situation would change the entries on the form. For more information on withholding and when you must furnish a new Form W-4, see Pub. 505, Tax Withholding and Estimated Tax.

Exemption from withholding. You may claim exemption from withholding for 2023 if you meet both of the following conditions: you had no federal income tax liability in 2022 and you expect to have no federal income tax liability in 2023. You had no federal income tax liability in 2022 if (1) your total tax on line 24 on your 2022 Form 1040 or 1040-SR is zero (or less than the sum of lines 27, 28, and 29), or (2) you were not required to file a return because your income was below the filing threshold for your correct filing status. If you claim exemption, you will have no income tax withheld from your paycheck and may owe taxes and penalties when you file your 2023 tax return. To claim exemption from withholding, certify that you meet both of the conditions above by writing "Exempt" on Form W-4 in the space below Step 4(c). Then, complete Steps 1(a), 1(b), and 5. Do not complete any other steps. You will need to submit a new Form W-4 by February 15, 2024.

Your privacy. If you have concerns with Step 2(c), you may choose Step 2(b); if you have concerns with Step 4(a), you may enter an additional amount you want withheld per pay period in Step 4(c).

Self-employment. Generally, you will owe both income and self-employment taxes on any self-employment income you receive separate from the wages you receive as an employee. If you want to pay income and self-employment taxes through withholding from your wages, you should enter the self-employment income on Step 4(a). Then compute your self-employment tax, divide that tax by the number of pay periods remaining in the year, and include that resulting amount per pay period on Step 4(c). You can also add half of the annual amount of self-employment tax to Step 4(b) as a deduction. To calculate self-employment tax, you generally multiply the self-employment income by 14.13% (this rate is a quick way to figure your selfemployment tax and equals the sum of the 12.4% social security tax and the 2.9% Medicare tax multiplied by 0.9235). See Pub. 505 for more information, especially if the sum of self-employment income multiplied by 0.9235 and wages exceeds \$160,200 for a given individual.

Nonresident alien. If you're a nonresident alien, see Notice 1392, Supplemental Form W-4 Instructions for Nonresident Aliens, before completing this form.

Specific Instructions

Step 1(c). Check your anticipated filing status. This will determine the standard deduction and tax rates used to compute your withholding.

Step 2. Use this step if you (1) have more than one job at the same time, or (2) are married filing jointly and you and your spouse both work.

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If you (and your spouse) have a total of only two jobs, you may check the box in option (c). The box must also be checked on the Form W-4 for the other job. If the box is checked, the standard deduction and tax brackets will be cut in half for each job to calculate withholding. This option is roughly accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld, and this extra amount will be larger the greater the difference in pay is between the two jobs.



Multiple jobs. Complete Steps 3 through 4(b) on only one Form W-4. Withholding will be most accurate if you do this on the Form W-4 for the highest paying job.

Step 3. This step provides instructions for determining the amount of the child tax credit and the credit for other dependents that you may be able to claim when you file your tax return. To qualify for the child tax credit, the child must be under age 17 as of December 31, must be your dependent who generally lives with you for more than half the year, and must have the required social security number. You may be able to claim a credit for other dependents for whom a child tax credit can't be claimed, such as an older child or a qualifying relative. For additional eligibility requirements for these credits, see Pub. 501, Dependents, Standard Deduction, and Filing Information. You can also include other tax credits for which you are eligible in this step, such as the foreign tax credit and the education tax credits. To do so, add an estimate of the amount for the year to your credits for dependents and enter the total amount in Step 3. Including these credits will increase your paycheck and reduce the amount of any refund you may receive when you file your tax return.

Step 4 (optional).

Step 4(a). Enter in this step the total of your other estimated income for the year, if any. You shouldn't include income from any jobs or self-employment. If you complete Step 4(a), you likely won't have to make estimated tax payments for that income. If you prefer to pay estimated tax rather than having tax on other income withheld from your paycheck, see Form 1040-ES, Estimated Tax for Individuals.

Step 4(b). Enter in this step the amount from the Deductions Worksheet, line 5, if you expect to claim deductions other than the basic standard deduction on your 2023 tax return and want to reduce your withholding to account for these deductions. This includes both itemized deductions and other deductions such as for student loan interest and IRAs.

Step 4(c). Enter in this step any additional tax you want withheld from your pay **each pay period**, including any amounts from the Multiple Jobs Worksheet, line 4. Entering an amount here will reduce your paycheck and will either increase your refund or reduce any amount of tax that you owe.

Form W-4 (2023)

Step 2(b) – Multiple Jobs Worksheet (Keep for your records.)



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. To be accurate, submit a new Form W-4 for all other jobs if you have not updated your withholding since 2019.

Note: If more than one job has annual wages of more than \$120,000 or there are more than three jobs, see Pub. 505 for additional tables.

| 1 | Two jobs. If you have two jobs or you're married filing jointly and you and your spouse each have one job, find the amount from the appropriate table on page 4. Using the "Higher Paying Job" row and the "Lower Paying Job" column, find the value at the intersection of the two household salaries and enter that value on line 1. Then, skip to line 3 | 1 | \$ |
|---|---|------------|----|
| 2 | Three jobs. If you and/or your spouse have three jobs at the same time, complete lines 2a, 2b, and 2c below. Otherwise, skip to line 3. | | |
| | a Find the amount from the appropriate table on page 4 using the annual wages from the highest paying job in the "Higher Paying Job" row and the annual wages for your next highest paying job in the "Lower Paying Job" column. Find the value at the intersection of the two household salaries and enter that value on line 2a | 2 a | \$ |
| | b Add the annual wages of the two highest paying jobs from line 2a together and use the total as the wages in the "Higher Paying Job" row and use the annual wages for your third job in the "Lower Paying Job" column to find the amount from the appropriate table on page 4 and enter this amount on line 2b | 2b | \$ |
| | c Add the amounts from lines 2a and 2b and enter the result on line 2c | 2c | \$ |
| 3 | Enter the number of pay periods per year for the highest paying job. For example, if that job pays weekly, enter 52; if it pays every other week, enter 26; if it pays monthly, enter 12, etc. | 3 | |
| 4 | Divide the annual amount on line 1 or line 2c by the number of pay periods on line 3. Enter this amount here and in Step 4(c) of Form W-4 for the highest paying job (along with any other additional amount you want withheld) | 4 | \$ |
| | Step 4(b) – Deductions Worksheet (Keep for your records.) | | |
| 1 | Enter an estimate of your 2023 itemized deductions (from Schedule A (Form 1040)). Such deductions may include qualifying home mortgage interest, charitable contributions, state and local taxes (up to \$10,000), and medical expenses in excess of 7.5% of your income | 1 | \$ |
| 2 | Enter: • \$27,700 if you're married filing jointly or a qualifying surviving spouse • \$20,800 if you're head of household • \$13,850 if you're single or married filing separately | 2 | \$ |
| 3 | If line 1 is greater than line 2, subtract line 2 from line 1 and enter the result here. If line 2 is greater than line 1, enter "-0-" | 3 | \$ |
| 4 | Enter an estimate of your student loan interest, deductible IRA contributions, and certain other adjustments (from Part II of Schedule 1 (Form 1040)). See Pub. 505 for more information | 4 | \$ |
| 5 | Add lines 3 and 4. Enter the result here and in Step 4(b) of Form W-4 | 5 | \$ |

Privacy Act and Paperwork Reduction Act Notice. We ask for the information on this form to carry out the Internal Revenue laws of the United States. Internal Revenue Code sections 3402(f)(2) and 6109 and their regulations require you to provide this information; your employer uses it to determine your federal income tax withholding. Failure to provide a properly completed form will result in your being treated as a single person with no other entries on the form; providing fraudulent information may subject you to penalties. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation; to cities, states, the District of Columbia, and U.S. commonwealths and territories for use in administering their tax laws; and to the Department of Health and Human Services for use in the National Directory of New Hires. We may also disclose this information to other countries under a tax treaty, to federal and state agencies to enforce federal nontax criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism.

You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. Generally, tax returns and return information are confidential, as required by Code section 6103.

The average time and expenses required to complete and file this form will vary depending on individual circumstances. For estimated averages, see the instructions for your income tax return.

If you have suggestions for making this form simpler, we would be happy to hear from you. See the instructions for your income tax return.

Form W-4 (2023) Page **4**

| Married Filing Jointly or Qualifying Surviving Spouse | | | | | | | | | | | | |
|---|----------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|------------------------|------------------------|
| Higher Paying Job | | <u>'</u> | viairieu i | | | | | Wage & S | | | | |
| Annual Taxable Wage & Salary | \$0 - 9,999 | \$10,000 - 19,999 | \$20,000 - 29,999 | \$30,000 - 39,999 | \$40,000 - 49,999 | \$50,000 - 59,999 | \$60,000 - 69,999 | \$70,000 - 79,999 | \$80,000 - 89,999 | \$90,000 - 99,999 | \$100,000 - 109,999 | \$110,000 - 120,000 |
| \$0 - 9,999 | \$0 | \$0 | \$850 | \$850 | \$1,000 | \$1,020 | \$1,020 | \$1,020 | \$1,020 | \$1,020 | \$1,020 | \$1,870 |
| \$10,000 - 19,999 | 0 | 930 | 1,850 | 2,000 | 2,200 | 2,220 | 2,220 | 2,220 | 2,220 | 2,220 | 3,200 | 4,070 |
| \$20,000 - 29,999 | 850 | 1,850 | 2,920 | 3,120 | 3,320 | 3,340 | 3,340 | 3,340 | 3,340 | 4,320 | 5,320 | 6,190 |
| \$30,000 - 39,999 | 850 | 2,000 | 3,120 | 3,320 | 3,520 | 3,540 | 3,540 | 3,540 | 4,520 | 5,520 | 6,520 | 7,390 |
| \$40,000 - 49,999 | 1,000 | 2,200 | 3,320 | 3,520 | 3,720 | 3,740 | 3,740 | 4,720 | 5,720 | 6,720 | 7,720 | 8,590 |
| \$50,000 - 59,999 | 1,020 | 2,220 | 3,340 | 3,540 | 3,740 | 3,760 | 4,750 | 5,750 | 6,750 | 7,750 | 8,750 | 9,610 |
| \$60,000 - 69,999 | 1,020 | 2,220 | 3,340 | 3,540 | 3,740 | 4,750 | 5,750 | 6,750 | 7,750 | 8,750 | 9,750 | 10,610 |
| \$70,000 - 79,999 | 1,020 | 2,220 | 3,340 | 3,540 | 4,720 | 5,750 | 6,750 | 7,750 | 8,750 | 9,750 | 10,750 | 11,610 |
| \$80,000 - 99,999 | 1,020 | 2,220 | 4,170 | 5,370 | 6,570 | 7,600 | 8,600 | 9,600 | 10,600 | 11,600 | 12,600 | 13,460 |
| \$100,000 - 149,999 | 1,870 | 4,070 | 6,190 | 7,390 | 8,590 | 9,610 | 10,610 | 11,660 | 12,860 | 14,060 | 15,260 | 16,330 |
| \$150,000 - 239,999 | 2,040 | 4,440 | 6,760 | 8,160 | 9,560 | 10,780 | 11,980 | 13,180 | 14,380 | 15,580 | 16,780 | 17,850 |
| \$240,000 - 259,999 \$260,000 - 279,999 | 2,040 2,040 | 4,440 4,440 | 6,760 6,760 | 8,160 8,160 | 9,560 9,560 | 10,780 10,780 | 11,980 11,980 | 13,180 13,180 | 14,380 14,380 | 15,580 15,580 | 16,780 16,780 | 17,850 18,140 |
| \$280,000 - 279,999 | 2,040 | 4,440 | 6,760 | 8,160 | 9,560 | 10,780 | 11,980 | 13,180 | 14,380 | 15,870 | 17,870 | 19,740 |
| \$300,000 - 319,999 | 2,040 | 4,440 | 6,760 | 8,160 | 9,560 | 10,780 | 11,980 | 13,470 | 15,470 | 17,470 | 19,470 | 21,340 |
| \$320,000 - 364,999 | 2,040 | 4,440 | 6,760 | 8,550 | 10,750 | 12,770 | 14,770 | 16,770 | 18,770 | 20,770 | 22,770 | 24,640 |
| \$365,000 - 524,999 | 2,970 | 6,470 | 9,890 | 12,390 | 14,890 | 17,220 | 19,520 | 21,820 | 24,120 | 26,420 | 28,720 | 30,880 |
| \$525,000 and over | 3,140 | 6,840 | 10,460 | 13,160 | 15,860 | 18,390 | 20,890 | 23,390 | 25,890 | 28,390 | 30,890 | 33,250 |
| | | | • | Single o | r Marrie | d Filing S | Separate | ly | • | | | • |
| Higher Paying Job | | | | Lowe | r Paying . | Job Annua | al Taxable | Wage & S | Salary | | | |
| Annual Taxable Wage & Salary | \$0 - 9,999 | \$10,000 - 19,999 | \$20,000 - 29,999 | \$30,000 - 39,999 | \$40,000 - 49,999 | \$50,000 - 59,999 | \$60,000 - 69,999 | \$70,000 - 79,999 | \$80,000 - 89,999 | \$90,000 - 99,999 | \$100,000 - 109,999 | \$110,000 - 120,000 |
| \$0 - 9,999 | \$310 | \$890 | \$1,020 | \$1,020 | \$1,020 | \$1,860 | \$1,870 | \$1,870 | \$1,870 | \$1,870 | \$2,030 | \$2,040 |
| \$10,000 - 19,999 | 890 | 1,630 | 1,750 | 1,750 | 2,600 | 3,600 | 3,600 | 3,600 | 3,600 | 3,760 | 3,960 | 3,970 |
| \$20,000 - 29,999 | 1,020 | 1,750 | 1,880 | 2,720 | 3,720 | 4,720 | 4,730 | 4,730 | 4,890 | 5,090 | 5,290 | 5,300 |
| \$30,000 - 39,999 | 1,020 | 1,750 | 2,720 | 3,720 | 4,720 | 5,720 | 5,730 | 5,890 | 6,090 | 6,290 | 6,490 | 6,500 |
| \$40,000 - 59,999 | 1,710 | 3,450 | 4,570 | 5,570 | 6,570 | 7,700 | 7,910 | 8,110 | 8,310 | 8,510 | 8,710 | 8,720 |
| \$60,000 - 79,999 | 1,870 | 3,600 | 4,730 | 5,860 | 7,060 | 8,260 | 8,460 | 8,660 | 8,860 | 9,060 | 9,260 | 9,280 |
| \$80,000 - 99,999 | 1,870 | 3,730 | 5,060 | 6,260 | 7,460 | 8,660 | 8,860 | 9,060 | 9,260 | 9,460 | 10,430 | 11,240 |
| \$100,000 - 124,999 | 2,040 | 3,970 | 5,300 | 6,500 | 7,700 | 8,900 | 9,110 | 9,610 | 10,610 | 11,610 | 12,610 | 13,430 |
| \$125,000 - 149,999 | 2,040 | 3,970 | 5,300 | 6,500 | 7,700 | 9,610 | 10,610 | 11,610 | 12,610 | 13,610 | 14,900 | 16,020 |
| \$150,000 - 174,999 \$175,000 - 100,000 | 2,040 | 3,970 | 5,610 7,580 | 7,610 | 9,610 | 11,610 | 12,610 | 13,750 | 15,050 | 16,350 | 17,650 | 18,770 |
| \$175,000 - 199,999 \$200,000 - 249,999 | 2,720 2,900 | 5,450 5,930 | 8,360 | 9,580 10,660 | 11,580 12,960 | 13,870 15,260 | 15,180 16,570 | 16,480 17,870 | 17,780 19,170 | 19,080 20,470 | 20,380 21,770 | 21,490 22,880 |
| \$250,000 - 399,999 | 2,900 | 6,010 | 8,440 | 10,740 | 13,040 | 15,340 | 16,640 | 17,870 | 19,170 | 20,470 | 21,770 | 22,960 |
| \$400,000 - 449,999 | 2,970 | 6,010 | 8,440 | 10,740 | 13,040 | 15,340 | 16,640 | 17,940 | 19,240 | 20,540 | 21,840 | 22,960 |
| \$450,000 and over | 3,140 | 6,380 | 9,010 | 11,510 | 14,010 | 16,510 | 18,010 | 19,510 | 21,010 | 22,510 | 24,010 | 25,330 |
| ***** | -, | ,,,,,,, | ,,,,,, | | | Househo | <u> </u> | 1 10,010 | | | , | |
| Higher Paying Job | | | | Lowe | er Paying | Job Annua | al Taxable | Wage & S | Salary | | | |
| Annual Taxable Wage & Salary | \$0 - 9,999 | \$10,000 - 19,999 | \$20,000 - 29,999 | \$30,000 - 39,999 | \$40,000 - 49,999 | \$50,000 - 59,999 | \$60,000 - 69,999 | \$70,000 - 79,999 | \$80,000 - 89,999 | \$90,000 - 99,999 | \$100,000 - 109,999 | \$110,000 - 120,000 |
| \$0 - 9,999 | \$0 | \$620 | \$860 | \$1,020 | \$1,020 | \$1,020 | \$1,020 | \$1,650 | \$1,870 | \$1,870 | \$1,890 | \$2,040 |
| \$10,000 - 19,999 | 620 | 1,630 | 2,060 | 2,220 | 2,220 | 2,220 | 2,850 | 3,850 | 4,070 | 4,090 | 4,290 | 4,440 |
| \$20,000 - 29,999 | 860 | 2,060 | 2,490 | 2,650 | 2,650 | 3,280 | 4,280 | 5,280 | 5,520 | 5,720 | 5,920 | 6,070 |
| \$30,000 - 39,999 | 1,020 | 2,220 | 2,650 | 2,810 | 3,440 | 4,440 | 5,440 | 6,460 | 6,880 | 7,080 | 7,280 | 7,430 |
| \$40,000 - 59,999 | 1,020 | 2,220 | 3,130 | 4,290 | 5,290 | 6,290 | 7,480 | 8,680 | 9,100 | 9,300 | 9,500 | 9,650 |
| \$60,000 - 79,999 | 1,500 | 3,700 | 5,130 | 6,290 | 7,480 | 8,680 | 9,880 | 11,080 | 11,500 | 11,700 | 11,900 | 12,050 |
| \$80,000 - 99,999 | 1,870 | 4,070 | 5,690 | 7,050 | 8,250 | 9,450 | 10,650 | 11,850 | 12,260 | 12,460 | 12,870 | 13,820 |
| \$100,000 - 124,999 | 2,040 | 4,440 | 6,070 | 7,430 | 8,630 | 9,830 | 11,030 | 12,230 | 13,190 | 14,190 | 15,190 | 16,150 |
| \$125,000 - 149,999 | 2,040 | 4,440 | 6,070 | 7,430 | 8,630 | 9,980 | 11,980 | 13,980 | 15,190 | 16,190 | 17,270 | 18,530 |
| \$150,000 - 174,999 \$175,000 - 100,000 | 2,040 | 4,440 | 6,070 | 7,980 | 9,980 | 11,980 | 13,980 | 15,980 | 17,420 | 18,720 | 20,020 | 21,280 |
| \$175,000 - 199,999 | 2,190 | 5,390 | 7,820 | 9,980 | 11,980 | 14,060 | 16,360 | 18,660 | 20,170 | 21,470 | 22,770 | 24,030 |
| \$200,000 - 249,999 \$250,000 - 449,999 | 2,720 | 6,190 6,470 | 8,920 9,200 | 11,380 11,660 | 13,680 | 15,980 16,260 | 18,280 | 20,580 | 22,090 22,380 | 23,390 23,680 | 24,690 | 25,950 |
| \$250,000 - 449,999 \$450,000 and over | 2,970 3,140 | 6,840 | 9,200 | 12,430 | 13,960 14,930 | 17,430 | 18,560 19,930 | 20,860 22,430 | 22,380 | 25,650 | 24,980 27,150 | 26,230 28,600 |
| ψ+JU,UUU and Over | 5,140 | 0,040 | 9,110 | 12,430 | 14,930 | 17,430 | 13,330 | 22,430 | 24,100 | 20,000 | 21,100 | 20,000 |

DEPARTMENT OF EDUCATION

At the direction of the U.S. Department of Education, we are required to obtain information on the ethnicity and racial identity of all Commonwealth employees. This information is being gathered to insure that the Commonwealth's affirmative action program to achieve equal employment opportunities is being effectively implemented. Please select **both** an ethnicity and race category. You may indicate one or more races.

1. What is your ethnicity? (Select One)

| | HISPANIC or LATINO -A person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture, regardless of race. |
|-------|--|
| | NOT HISPANIC or LATINO |
| 2. Wh | at is your race? (Select One or <u>More</u>) |
| | AMERICAN INDIAN or ALASKA NATIVE –A person having origins in any of the original peoples of North and South America (including Central America), and who maintains tribal affiliation or community attachment. |
| | ASIAN - A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent, including for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam. |
| | BLACK or AFRICAN AMERICAN – A person having origins in any of the black racial groups of Africa. |
| | NATIVE HAWAIIAN or OTHER PACIFIC ISLANDER – A person with origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands. |
| | WHITE - A person in any of the original peoples of Europe, the Middle East, or North Africa. |
| | |
| | SIGNATURE DATE |



RESIDENCY CERTIFICATION FORM Local Earned Income Tax Withholding

TO EMPLOYERS/TAXPAYERS:

This form is to be used by employers and/or taxpayers to report essential information for the collection and distribution of Local Earned Income Taxes. This form must be utilized by employers when a new employee is hired or when a current employee notifies employer of a name and/or address change.

| EMPLO | YEE INFORMATION - RESIDEN | NCE LOCATI | ON |
|--|---|----------------|--|
| NAME (Last Name, First Name, Middle Initial) | | | SOCIAL SECURITY NUMBER |
| STREET ADDRESS (No PO Box, RD or RR) | | | |
| SECOND LINE OF ADDRESS | | | |
| СІТУ | STATE | ZIP CODE | DAYTIME PHONE NUMBER |
| MUNICIPALITY (City, Borough or Township) | | | <u> </u> |
| COUNTY | RESIDENT PSD CO | ODE | TOTAL RESIDENT EIT RATE |
| | | | |
| | ER INFORMATION - EMPLOYN | MENT LOCAT | |
| EMPLOYER BUSINESS NAME (Use Federal ID Name) Pennsylvania Western University | | | EMPLOYER FEIN |
| STREET ADDRESS (No PO Box, RD or RR) | | | |
| SECOND LINE OF ADDRESS | | | |
| CITY | STATE PA | ZIP CODE | PHONE NUMBER 717-720-4040 |
| MUNICIPALITY (City, Borough or Township) | | | <u> </u> |
| COUNTY | WORK LOCATION | PSD CODE | WORK LOCATION NON-RESIDENT EIT RATE |
| | | | |
| | CERTIFICATION | | |
| | I (we) declare that I (we) have examined this i | | |
| SIGNATURE OF EMPLOYEE | | | DATE (MM/DD/YYYY) |
| PHONE NUMBER | EMAIL ADDRESS | | |
| | l l | | |
| | | | |
| For information on obtaining the appropriate | MUNICIPALITY (City, Borough, Towns | ship), PSD COD | DES and EIT (Earned Income Tax) RATES, |

please refer to the Pennsylvania Department of Community & Economic Development website:

www.newPA.com



DIRECT DEPOSIT AUTHORIZATION FORM

How Direct Deposit works -

The Pennsylvania State System of Higher Education notifies your financial institution electronically of the funds to be deposited on your behalf. Your financial institution records this transaction into an account of your choice, creating immediate access on the day of deposit. You receive an earnings statement documenting this payment. If you desire to make a direct deposit into more than one institution, you must complete a form for each institution. Only one deposit can be made to one account at each institution.

- ✓ It's convenient saves you a trip to the bank.
- ✓ **It's faster** most banks post the funds to your account at the beginning of the day's business on payday allowing immediate access.
- ✓ It's safer Direct Deposit eliminates the worry of a lost or stolen paycheck.
- ✓ It's confidential funds are automatically processed and you can instruct your bank to apply them
 to your savings or checking account.

| Name | |
|--|---|
| biweekly payroll deduction to the Financassociation, or credit union in the U.S. th | (may be found on pay statement) te System of Higher Education to (circle one) Start / Change / Stop total cial Institution shown below. You may designate any bank, savings and loan at (1) is a member of the Federal Reserve System and (2) accepts electronic e institution you choose does not qualify. |
| Financial Institution Name | |
| Transit Routing Number | |
| Account Number | |
| Account Type (Savings/Checking) | |
| Deduction Amount (\$ Amount) | |
| Effective with pay date of | |
| System of Higher Education to initiate crin error to my (our) account(s) listed about purpose of verifying my account number | Financial Institution indicated above and authorize the Pennsylvania State edit entries and to initiate debit entries and adjustments for any credit entries ove. I have provided a copy of a voided check (see attached) solely for the er and the Financial Institution's routing number. My authorization will remain or until I terminate my employment with the Pennsylvania State System of |
| Signature | Date |



Employment Eligibility Verification

Department of Homeland Security

U.S. Citizenship and Immigration Services

USCIS Form I-9

OMB No. 1615-0047 Expires 10/31/2022

▶ START HERE: Read instructions carefully before completing this form. The instructions must be available, either in paper or electronically, during completion of this form. Employers are liable for errors in the completion of this form.

ANTI-DISCRIMINATION NOTICE: It is illegal to discriminate against work-authorized individuals. Employers **CANNOT** specify which document(s) an employee may present to establish employment authorization and identity. The refusal to hire or continue to employ an individual because the documentation presented has a future expiration date may also constitute illegal discrimination.

| Section 1. Employee Information than the first day of employment, but not | | | ust complete an | d sign Se | ection 1 o | f Form I-9 no later | | | |
|---|--|-----------------|-----------------|--------------------|-----------------------------------|------------------------|--|--|--|
| Last Name (Family Name) | First Name (Given Name) Middle Initial Other | | | | r Last Names Used <i>(if any)</i> | | | | |
| Address (Street Number and Name) | Apt. Number | City or Town | | | State | ZIP Code | | | |
| Date of Birth (mm/dd/yyyy) U.S. Social Security Number Employee's E-mail Address | | | | | | Telephone Number | | | |
| I am aware that federal law provides for connection with the completion of this f | form. | | | or use of | f false do | ocuments in | | | |
| I attest, under penalty of perjury, that I a | am (check one of the | e following box | (es): | | | | | | |
| 1. A citizen of the United States | | | | | | | | | |
| 2. A noncitizen national of the United States | (See instructions) | | | | | | | | |
| 3. A lawful permanent resident (Alien Reg | gistration Number/USCI | S Number): | | | | | | | |
| 4. An alien authorized to work until (expira | • | | | _ | | | | | |
| Some aliens may write "N/A" in the expira | • | , | | | Q | R Code - Section 1 | | | |
| Aliens authorized to work must provide only on An Alien Registration Number/USCIS Number | • | | , | | | ot Write In This Space | | | |
| Alien Registration Number/USCIS Number: OR | | | | | | | | | |
| 2. Form I-94 Admission Number: OR | | | | | | | | | |
| 3. Foreign Passport Number: | | | | | | | | | |
| Country of Issuance: | | | | | | | | | |
| Signature of Employee | | | Today's Date | e (<i>mm/dd</i> / | /уууу) | | | | |
| Preparer and/or Translator Certification (check one): I did not use a preparer or translator. A preparer(s) and/or translator(s) assisted the employee in completing Section 1. (Fields below must be completed and signed when preparers and/or translators assist an employee in completing Section 1.) I attest, under penalty of perjury, that I have assisted in the completion of Section 1 of this form and that to the best of my | | | | | | | | | |
| knowledge the information is true and c | orrect. | | | | and that | | | | |
| Signature of Preparer or Translator | | | | Today's [| Date (mm/d | dd/yyyy) | | | |
| Last Name (Family Name) | | First Nan | ne (Given Name) | | | | | | |
| Address (Street Number and Name) | | City or Town | | | State | ZIP Code | | | |

ST0F

Employer Completes Next Page

STOP

Form I-9 10/21/2019 Page 1 of 3



Employment Eligibility Verification Department of Homeland Security

U.S. Citizenship and Immigration Services

USCIS Form I-9

OMB No. 1615-0047 Expires 10/31/2022

Section 2. Employer or Authorized Representative Review and Verification

(Employers or their authorized representative must complete and sign Section 2 within 3 business days of the employee's first day of employment. You

| must physically examine one docu of Acceptable Documents.") | ment from List | A OR | a combin | ation of one | document f | from List | B and | one docum | nent from Li | ist C as listed on the "Lists |
|--|----------------|----------|------------|----------------|--------------|-------------|----------|--------------|----------------------|---|
| Employee Info from Section 1 | Last Name (| Family | Name) | | First Name | e (Given | Name) |) M. | I. Citizer | nship/Immigration Status |
| List A Identity and Employment Aut | | OR | | List Iden | | | AN | D | Emple | List C byment Authorization |
| Document Title | | Do | cument T | | y | | | Document | | , |
| Issuing Authority | | Iss | uing Auth | ority | | | | Issuing Au | thority | |
| Document Number | | Do | cument N | lumber | | | | Document | Number | |
| Expiration Date (if any) (mm/dd/yy | уу) | Exp | piration D | ate (if any) (| mm/dd/yyy | <i>y)</i> | | Expiration | Date (if an | y) (mm/dd/yyyy) |
| Document Title | | | | | | | | | | |
| Issuing Authority | | A | dditiona | Informatio | n | | | | | Code - Sections 2 & 3 of Write In This Space |
| Document Number | | | | | | | | | | |
| Expiration Date (if any) (mm/dd/yy | уу) | | | | | | | | | |
| Document Title | | | | | | | | | | |
| Issuing Authority | | | | | | | | | | |
| Document Number | | | | | | | | | | |
| Expiration Date (if any) (mm/dd/yy | уу) | | | | | | | | | |
| Certification: I attest, under per (2) the above-listed document (employee is authorized to work | s) appear to | be ge | nuine ar | | | | | | | |
| The employee's first day of | | | | <i>ı</i>): | | (Se | ee ins | structions | for exen | nptions) |
| Signature of Employer or Authorize | ed Representa | ative | | Today's Da | te (mm/dd/y | yyy) | Title o | f Employer | or Authoriz | red Representative |
| Last Name of Employer or Authorized | Representative | Firs | st Name of | Employer or i | Authorized R | epresenta | tive | Employer' | s Business | or Organization Name |
| Employer's Business or Organizati | on Address (S | Street N | Number ai | nd Name) | City or Tov | wn | - | | State | ZIP Code |
| Section 3. Reverification | and Rehire | es (To | be com | pleted and | signed by | employ | er or | authorized | d represer | ntative.) |
| A. New Name (if applicable) | | | | | | | В | B. Date of R | Rehire <i>(if ap</i> | plicable) |
| Last Name (Family Name) | Firs | t Name | e (Given I | lame) | Mic | ldle Initia | ıl | Date (mm/d | ld/yyyy) | |
| C. If the employee's previous grant continuing employment authorization | | | | | provide the | informat | tion for | r the docum | nent or rece | eipt that establishes |
| Document Title | | | | Docume | ent Number | | | E | Expiration D | ate (if any) (mm/dd/yyyy) |
| I attest, under penalty of perjuithe employee presented docur | | | | | | | | | | |
| Signature of Employer or Authorize | | | | Date (mm/c | | | | | | epresentative |

LISTS OF ACCEPTABLE DOCUMENTS All documents must be UNEXPIRED

Employees may present one selection from List A or a combination of one selection from List B and one selection from List C.

| | LIST A Documents that Establish Both Identity and Employment Authorization | OR | LIST B Documents that Establish Identity AN | ID | LIST C Documents that Establish Employment Authorization |
|----|--|----|---|----|--|
| 2. | U.S. Passport or U.S. Passport Card Permanent Resident Card or Alien Registration Receipt Card (Form I-551) Foreign passport that contains a temporary I-551 stamp or temporary | | 1. Driver's license or ID card issued by a State or outlying possession of the United States provided it contains a photograph or information such as name, date of birth, gender, height, eye color, and address | 1. | A Social Security Account Number card, unless the card includes one of the following restrictions: (1) NOT VALID FOR EMPLOYMENT (2) VALID FOR WORK ONLY WITH INS AUTHORIZATION |
| 4. | I-551 printed notation on a machine- readable immigrant visa Employment Authorization Document that contains a photograph (Form I-766) | | 2. ID card issued by federal, state or local government agencies or entities, provided it contains a photograph or information such as name, date of birth, gender, height, eye color, and address | 2. | (3) VALID FOR WORK ONLY WITH DHS AUTHORIZATION Certification of report of birth issued by the Department of State (Forms DS-1350, FS-545, FS-240) |
| 5. | For a nonimmigrant alien authorized to work for a specific employer because of his or her status: a. Foreign passport; and b. Form I-94 or Form I-94A that has | | School ID card with a photograph Voter's registration card U.S. Military card or draft record Military dependent's ID card | 3. | Original or certified copy of birth certificate issued by a State, county, municipal authority, or territory of the United States bearing an official seal |
| | the following: (1) The same name as the passport; and | | U.S. Coast Guard Merchant Mariner Card Native American tribal document | 5. | Native American tribal document U.S. Citizen ID Card (Form I-197) Identification Card for Use of |
| | (2) An endorsement of the alien's nonimmigrant status as long as that period of endorsement has not yet expired and the proposed employment is not in conflict with any restrictions or | | 9. Driver's license issued by a Canadian government authority For persons under age 18 who are unable to present a document | | Resident Citizen in the United States (Form I-179) Employment authorization document issued by the |
| 6. | Passport from the Federated States of Micronesia (FSM) or the Republic of the Marshall Islands (RMI) with Form I-94 or Form I-94A indicating nonimmigrant admission under the Compact of Free Association Between the United States and the FSM or RMI | - | listed above: 10. School record or report card 11. Clinic, doctor, or hospital record 12. Day-care or nursery school record | | Department of Homeland Security |

Examples of many of these documents appear in the Handbook for Employers (M-274).

Refer to the instructions for more information about acceptable receipts.

Form I-9 10/21/2019 Page 3 of 3

LOCAL SERVICES TAX – EXEMPTION CERTIFICATE

Tax Year (MUST BE COMPLETED EVERY YEAR)

APPLICATION FOR EXEMPTION FROM LOCAL SERVICES TAX

- A copy of this application for exemption from the Local Services Tax (LST), and all necessary supporting documents, must be completed and presented to your employer AND to the political subdivision levying the Local Services Tax where you are principally employed.
- This application for exemption from the Local Services Tax must be signed and dated.
- ➤ No exemption will be approved until proper documentation has been received.

| Name: | Soc Sec #: |
|-------------------------|---|
| | Phone #: |
| City/State: | Zip: |
| | REASON FOR EXEMPTION |
| 1 | MULTIPLE EMPLOYERS: Attach a copy of a current pay statement from your principal employer that shows the name of the employer, the length of the payroll period and the amount of Local Services Tax withheld. List all employers on the reverse side of this form. You must notify your other employers of a change in principal place of employment within two weeks of the change. |
| 2 | EXPECTED TOTAL EARNED INCOME AND NET PROFITS FROM ALL SOURCES WITHIN (municipality or school district) WILL BE LESS THAN \$: Attach copies of your last pay statements or your W-2 for the year prior. |
| | If you are self-employed, please attach a copy of your PA Schedule C, F, or RK-1 for the prior year. |
| 3 | ACTIVE DUTY MILITARY EXEMPTION: Please attach a copy of your orders directing you to active duty status. Annual training is not eligible for exemption. You are required to advise the tax office when you are discharged from active duty status. |
| 4 | MILITARY DISABILITY EXEMPTION: Please attach copy of your discharge orders and a statement from the United States Veterans Administrator documenting your disability. Only 100% permanent disabilities are recognized for this exemption. |
| portion of the ca | Once you receive this Exemption Certificate, you shall not withhold the Local Services Tax for the dendar year for which this certificate applies, unless you are otherwise notified or instructed by the withhold the tax. |
| Γax Office: | Di # |
| Address: Tity/State: | Phone #: |
| ny/State | Zip: |

IMPORTANT NOTE TO EMPLOYERS

- 1. The municipality is required by law to exempt from the LST employees whose earned income from all sources (employers and self-employment) in their municipality is less than \$12,000 when the levied rate exceeds \$10.00.
- 2. The school district for the municipality in which your worksite(s) is located may or may not levy an LST. If it does, the income exemption provided may differ from the municipality and can be anywhere from \$0 to \$11,999.
- 3. Contact the tax office where your business worksites are located to obtain this information.

Employment Information: List all places of employment for the applicable tax year. Please list your PRIMARY EMPLOYER under #1 below and your secondary employers under the other columns. If self employed, write SELF under Employer Name column.

| | 1. PRIMARY EMPLOYER | 2. | 3. | |
|--|---------------------|--|----------|--|
| Employer Name | | | | |
| Address | | | | |
| Address 2 | | | | |
| City, State Zip | | | | |
| Municipality | | | | |
| Phone | | | | |
| Start Date | | | | |
| End Date | | | | |
| Status (FT or PT) | | | | |
| Gross Earnings | | | | |
| | | | | |
| | 4. | 5. | 6. | |
| Employer Name | -Ti | | <u>.</u> | |
| Address | | | | |
| Address 2 | | | | |
| City, State Zip | | | | |
| Municipality | | | | |
| Phone | | | | |
| Start Date | | | | |
| End Date | | | | |
| Status (FT or PT) | | | | |
| Gross Earnings | | | | |
| | | | | |
| | | | | |
| PLEASE NOTE: | | | | |
| | | s considered to be CONFIDEN ninistration and enforcement | | |
| I DECLARE UNDER PENALTY OF LAW THAT THE INFORMATION STATED ON AND ATTACHED TO THIS FORM IS TRUE AND CORRECT: | | | | |
| SIGNATURE: | | DA' | ГЕ: | |

4190010101



REV-419 EX (05-10) Employee's Nonwithholding Application Certificate PA DEPARTMENT OF REVENUE

Purpose. Complete Form REV-419 so that your employer can withhold the correct Pennsylvania personal income tax from your pay. Complete a new Form REV-419 every year or when your personal or financial situation changes. Photocopies of this form are acceptable.

Note: Unless the state of residence changes, residents of the reciprocal states listed in the next paragraph do not need to refile this application every year.

Who is Eligible for Nonwithholding? You may be entitled to nonwithholding of PA personal income tax if you incurred no liability for income tax the preceding tax year and/or you anticipate that you will incur no liability for income tax during the current tax year, according to the Special Tax Provisions of section 304 of the Tax Reform Code, the Servicemember Civil Relief Act (SCRA) or as a resident of the reciprocal state of Indiana, Maryland, New Jersey, Ohio, Virginia or West Virginia and your employer agrees to withhold the income tax from that state.

When to Claim? File this certificate with your employer as soon as you determine you are entitled to claim nonwithholding. You must file a certificate each year you are eligible (see Note above for an exception). If you are employed by more than one employer you must file a separate REV-419 with each employer.

Responsibilities of Employee. You must revoke this certification within 10 days from the day you anticipate you will incur PA personal income tax liability for the current tax year. To discontinue or revoke this certification, submit notification in writing to your employer. Claimants who qualify for complete Tax Forgiveness under section 304 of the Tax Reform Code must file a PA-40, Pennsylvania Personal Income Tax Return, and Schedule SP to claim Tax Forgiveness even if they are eligible for nonwithholding.

Under the SCRA, as amended by the Military Spouses Residency Relief Act, you may be exempt from PA personal income tax on your wages if (i) your spouse is a member of the armed forces present in PA in compliance with military orders; (ii) you are present in PA solely to be with your spouse; and (iii) you and your spouse both maintain the same domicile (state residency) in another state. If you claim exemption under the SCRA, enter your state of domicile (legal residence) on Line d below and attach a copy of your spousal military identification card and your spouse's current military orders to form REV-419.

Responsibilities of Employer.

If you agree not to withhold PA tax because your employee is a resident of a reciprocal state, you must withhold the other state's tax. Retain Form REV-419 with your records. You are required to submit a copy of this certificate

OFFICIAL USE ONLY

and accompanying attachments to the PA DEPARTMENT OF REVENUE, BUREAU OF BUSI-NESS TRUST FUND TAXES, PO BOX 280904, HARRISBURG, PA 17128-0904, when:

- you have reason to believe this certificate is incorrect;
- the PA taxable gross compensation of any employee who claimed either exemption from nonwithholding a or b below exceeds \$1,625 for any quarter;
- the employee claims an exemption from withholding on the basis of residence in a reciprocal state (Indiana, Maryland, New Jersey, Ohio, Virginia or West Virginia) and therefore, you agree to withhold income tax of the employee's state of residence; or
- the employee claims an exemption from withholding under the SCRA as amended by the Military Spouses Residency Relief Act.

Department's Responsibility. Upon receipt of any exemption application, the department will make a determination and notify the employer if a change is required. If the department disapproves the application, the employer must immediately commence withholding at the regular rate. Once a certificate is revoked by the department, the employer must send any new application received from the employee to the department for approval before implementing the nonwithholding.

| Please print or type. A fill-in f | form may be obtained from www.rev | venue.state.pa.us. | |
|---|--|--|---|
| Employee name: first, middle initial, last | | Social Security Number | Telephone Number |
| Street Address City, State, ZIP | | Tax Year (not necessary | if checking Box c below) |
| I claim exception from withholding because I do not expect to ov | we Pennsylvania personal income tax due | to the reason(s) checked | below: |
| a. Last year I qualified for Tax Forgiveness of my PA | personal income tax liability and had a ri | ght to a full refund of all i | ncome tax withheld. |
| This year I expect to qualify for Tax Forgiveness of tax withheld. | my PA personal income tax liability and | expect to have a right to | a full refund of all income |
| c. I declare I am a resident of the reciprocal state ch INDIANA MARYLAND NEW JERS and that pursuant to the reciprocal tax agreement and authorize my employer to withhold income tax d. I certify I am a legal resident of the state of | EY OHIO VIRGINIA between that state and PA, I claim an exo of for my resident state on compensation and am not subject | paid to me in the Common at to Pennsylvania withhol | nwealth of Pennsylvania. ding because I meet the |
| requirements set forth under the Servicemembers Under penalties of perjury, I certify that I did not incur any Penr to incur any liability during the current tax year based on the re | nsylvania personal income tax liability du | , , | |
| Employee Signature | · · | | Date Example mm/dd/yyyy |
| Employer Name | | Federal Employer Identifi | ication Number |
| Business Address | | | Telephone Number |
| City, State, ZIP | | | |
| Employer's Signature | Employee's Quarterly Compensation (no. \$ | ot required for applicants ch | necking Box c or d above) |

4190010101



STATEMENT OF CITIZENSHIP STATUS and TAXATION Pennsylvania State System of Higher Education

| | Pennsylvania V | Vestern | University | Ta | ax Year 20 | |
|---------------------------|--|--------------------------|---|--|---------------------|--|
| | | | visions of the U.S. Internal determine the correct rate | | | |
| registrat 2. All other | ent U.S. resident tion card (green ors, complete enti | card). re form, and a | omplete sections A,B,C, D attach a copy of your I-94 P-66, I-20, Notice of Actior | (Arrival and Departure Re | ecord) and your wor | |
| A. PERSONA | AL INFORMATION | : | | | | |
| Name (last | , first, middle) | | Date of Birth | Date of Birth Local Phone # | | |
| Street add | Street address while in U.S. | | Street address in | Street address in country of residence | | |
| City | | | City | City | | |
| State | | Zip Code | Country | | Postal Code | |
| E EMDI OVA | MENT INFORMATI | ON: | | | | |
| ☐ Fac | culty / Staff Empl | oyee | urs per week during the aca | ademic year) | | |
| SOCIAL SEC | CURITY INFORMA | TION: | | | | |
| Have you | applied for a Soc | cial Security N | umber (SSN)? | | | |
| | Yes - My numbe | er is | | | | |
| | payroll office ca | in direct you t | er work and be paid you to the university represent e in writing when you receiv | ative who can assist you | | |

PRIVACY NOTIFICATIONS:

Pursuant to the Federal Privacy Act of 1974, you are hereby notified that disclosure of your Social Security Number is mandatory. Disclosure of the Social Security Number is required pursuant to sections 6011 and 6051 of Subtitle F of the Internal Revenue Code and with Regulation 4, Section 404.1256, Code of Federal Regulations under Section 218, Title II of the Social Security Act, as amended. The Social Security Number is used to verify your identity. The principal uses of the number shall be to report (1) state and federal income taxes withheld, (2) Social Security contributions, (3) state unemployment and Workers' Compensation earnings, and (4) earnings and contributions to participating retirement systems.



Citizen of (Country)

STATEMENT OF CITIZENSHIP STATUS and TAXATION Pennsylvania State System of Higher Education

Resident of (Country)

D. CITIZENSHIP AND VISA INFORMATION:

| What | country issued you a | passport? | Passpo | rt Numbe | er | | at is the primary purpose of your it to the US? |
|---------------|--|--------------|---------------------|------------|-----------------------|--------|--|
| | your first visit to the please list all entries | | ☐ Yes 5. and the | _ | No s non-visitor v | isa ty | ypes (F1, J1, H1-B): |
| | Date of Entry into U.S | S. | Da | te of Exit | from U.S. | | Visa Type |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| Most date: | recent U.S. entry | Visa type | on I-94: | Expirati | on date of I-94 | 4: | Intended length of stay in U.S. (if known): |
| | E. DETERMINATION OF FEDERAL TAX WITHHOLDING STATUS. (To be completed by alien.) Follow directions for each test. | | | | | | |
| Test 1 | : "Exempt Individual" | Days for S | ubstantia | al Presen | ce Check an | y apı | plicable statement: |
| | I have a Type A visa | or Diploma | itic or Co | nsular sta | atus. | | |
| | I have a J-1 visa and for less than 2 cale | | | | | seard | cher, or student on a J-1 or F-1 visa |
| | I am a student on a | n F-1 or J-1 | visa and | I have be | en in the U.S. | for f | ive or fewer calendar years. |
| | | ith the IRS | | | | | more than five calendar years, and I S. when my education is completed. |
| | | | | | | | se complete "Test 2" completely but otherwise calculate the days. |



STATEMENT OF CITIZENSHIP STATUS and TAXATION Pennsylvania State System of Higher Education

| Test 2: Substantial P | resence Test (| SPT) | | | | | | |
|--|--------------------|----------------|-----------------|-------|--------------------------|-------------------|-----------------|---------------|
| I have been present | n the US durin | g the curre | ent and the pre | vious | two years a | s follows: | | |
| | | Visa | Date | | ate | Number of | | Computation |
| | Enter year | Туре | Entered US | D | eparted US | Days in US | | of SPT |
| Current Year | | | | | | | x 1 = | |
| Outrette real | | | | | | | X <u>T</u> | |
| 1 st Preceding Year | | | | | | | x 1/3 = | |
| | | | | | | | | |
| 2 nd Preceding Year | | | | | | | x 1/6 = | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| Total I | | | | | | Total Days: | | |
| | | | | | | | | |
| Option: I elect to arrive in the Unit will make me sul the 218 Agreement | ed States. Thi | s will allow | me to complet | e a V | V-4 like any | U.S. citizen for | federal with | nholding, and |
| F. SIGNATURE: | | | | | | | | |
| I declare under the p | enalties of per | jury that th | is statement, t | 0 | | | | |
| the best of my knowl | edge and belie | ef, is true a | nd correct. | | | | | |
| | | | | | | | | |
| | Signature | | | | | Date | | |
| Department | | | | | | | | |
| Contact: | | | | | Contact's F | Phone #: | | |
| | | | | | | | | |
| ATTACH ALL OF THE | FOLLOWING D | OCUMENTS | S: | | | | | |
| All Nonresident | t Aliens in the l | J.S. under | a visa | | Green Car | d Holders | | |
| ☐ Completed Ear | | | | | | d Earned Incor | ne Question | naire |
| ☐ Completed For | m I-9 (1st time hi | red & thereaft | ter upon | | l Complete | d Form I-9 (1st t | ime hired & the | ereafter upon |
| expiration of docu | | | | _ | expiration of | | | |
| ☐ Completed For | m W-4 | | | L | I Completed changes by a | d Form W-4 (w | hen hired, then | optional |
| ☐ I-94 ☐ DS-2019/IAP-6 | S6 or L20 | | | Г | | d (11797/1179 | 97Ad | |
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Please forward this form and the requested documents to the Payroll Office.

MEMO

TO: All Faculty, Staff, Student Workers, Volunteers, Program Administrators and

Contractors

SUBJECT: Reporting of Arrests or Convictions and Reporting Suspected Child Abuse

As required by the Child Protective Services Law, effective December 31, 2014, all employees, volunteers, and program administrators must self-report within 72 hours if they are arrested or convicted of certain reportable offenses outlined in the law. Attached you will find the form (Pennsylvania's State System of Higher Education 72-Hour Self-Reporting of Reportable Offenses) to be used to report those offenses. Also included is a confirmation sheet to confirm you have received and read this memo and the form.

If the university or program administrator has a reasonable belief that an employee or volunteer has been arrested or convicted of a reportable offense or was named as perpetrator in a founded or indicated report, or if an employee or volunteer has provided notice of activity that would be sufficient to deny employment or program participation, the university or program administrator must immediately require the employee or volunteer to immediately submit current information as required to secure the three background clearance checks. Any employee or volunteer who fails to comply with this paragraph may be subject to discipline up to and including termination or removal.

Report Suspected Child Abuse – In a situation of suspected child abuse, all State System administrators, faculty, coaches, staff, student workers, independent contractors, and volunteers are mandated reporters under State System Policy. You, as a mandated reporter must immediately contact the Department of Human Services (DHS) by calling 1-800-932-0313 to report suspected child abuse. Immediately following the report to DHS, the mandated reporter must notify the Office of Diversity, Equity and Inslusion and the Chief of the University Campus Police Department.

Please see State System Policy 2014-01-A: Protection of Minors for detailed information on reporting obligations. Please sign the confirmation sheet and return to the Payroll Office. Please feel free to call the Human Resources Office with any questions.

REPORTING OF ARRESTS OR CONVICTIONS

Confirmation Form For Pennsylvania Western University

I understand I must provide written notice to the Director of Human Resources within 72 hours after:

- 1) an arrest or conviction for one of the Reportable Offenses named on *Pennsylvania's*State System of Higher Education 72-Hour Self-Reporting of Reportable Offenses Form.
- 2) notice of being listed in the state wide database as a perpetrator of a founded or indicated report of child abuse.

For this purpose, written notice shall mean completing *Pennsylvania's State System of Higher Education 72-Hour Self-Reporting of Reportable Offenses Form* and providing it to Human Resources.

| | D and READ the Memo from Human Resources and Higher Education 72-Hour Self-Reporting of Reportable |
|----------------|--|
| Offenses Form. | Trigiter Education 72-110ar Seij-Reporting of Reportable |
| | ort within 72 hours if arrested or convicted of any of the |
| | |
| Signature | Date |



Pennsylvania's State System of Higher Education 72-Hour Self-Reporting of Reportable Offenses

(Under the Child Protective Services Law)

Please read this entire form carefully before completing it. This form is to be used by current employees, volunteers, and applicants for employment to provide written notice within 72 hours after an arrest or conviction for a Reportable Offense or notice of being listed in the statewide database as a perpetrator of a founded or indicated report of child abuse.

| Section 1. Personal Information | | | |
|--|----------------|---|---|
| Full Legal Name: | Date of Birth: | / | / |
| Any former names or aliases by which you have been identified: | | | |

Section 2. Instructions

Individuals completing this form are required to submit the form to the administrator or other person responsible for employment decisions at the university. If you have questions regarding to whom the form should be sent, please contact your supervisor or the office of human resources at the university.

If you have any question about whether to report an offense, you should report it. An employee or volunteer who willfully fails to disclose information required for self-reporting could be charged with a misdemeanor of the third degree and may be subject to discipline up to and including termination or denial of employment or volunteer position.

List of Reportable Offenses

A Reportable Offense enumerated under Pennsylvania's Child Protective Services Law, 23 Pa.C.S. § 6344(c), consists of one or more of the following:

- (i) Provisions of Title 18 of the Pennsylvania Consolidated Statutes (relating to crimes and offenses) or an equivalent crime under the laws or former laws of the United States or one of its territories or possessions, another state, the District of Columbia, the Commonwealth of Puerto Rico or a foreign nation, or under a former law of the Commonwealth of Pennsylvania:
 - Chapter 25 relating to criminal homicide
 - Section 2702 relating to aggravated assault
 - Section 2709.1 relating to stalking
 - Section 2901 relating to kidnapping
 - Section 2902 relating to unlawful restraint
 - Section 3121 relating to rape
 - Section 3122.1 relating to statutory sexual assault
 - Section 3123 relating to involuntary deviate sexual intercourse
 - Section 3124.1 relating to sexual assault
 - Section 3125 relating to aggravated indecent assault
 - Section 3126 relating to indecent assault
 - Section 3127 relating to indecent exposure
 - Section 4302 relating to incest
 - Section 4303 relating to concealing death of a child
 - Section 4304 relating to endangering welfare of children

- Section 4305 relating to dealing in infant children
- A felony offense under Section 5902(b) relating to prostitution and related offenses
- Section 5903(c) or (d) relating to obscene and other sexual materials and performances
- Section 6301 relating to corruption of minors
- Section 6312 relating to sexual abuse of children
- A felony offense under section 2718 (relating to strangulation)
- A felony offense under section 3301 (relating to arson and related offenses)
- An offense under 18 U.S.C. § 2261 (relating to interstate domestic violence) or § 2262 (relating to interstate violation of protection order)
- the attempt, solicitation, or conspiracy to commit any of the above

Attachment 3

- (ii) An offense designated as a felony under the act of April 14, 1972 (P.L. 233, No. 64), known as "The Controlled Substance, Drug, Device and Cosmetic Act," committed within the preceding five-year period.
- (iii) A founded report or indicated report of child abuse within the preceding five-year period in the statewide database maintained by the Department of Human Services.
- (iv) Identification on the National Crime Information Center National Sex Offender Registry or on a state's sex offender registry.

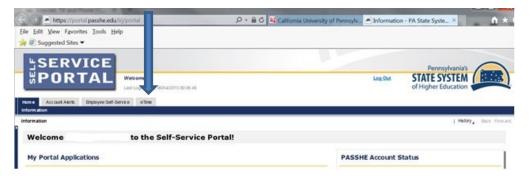
| Section 3. | . Report of Arrest or Conviction |
|---------------------------|---|
| By chec | king this box, I report that I have been: arrested for, or convicted of one of more of the following under the laws or former laws of the United States or one of its territories or possessions, another state, the District of Columbia, the Commonwealth of Puerto Rico or a foreign nation, or under a former law of the Commonwealth of Pennsylvania: a Reportable Offense; an offense similar in nature to a Reportable Offense; the attempt, solicitation, or conspiracy to commit a Reportable Offense or offense similar in nature to a Reportable Offense; and/or named as a perpetrator of a founded or indicated report in the statewide database maintained by the Department of Human Services. |
| (See Section | n 2 for a list of Reportable Offenses.) |
| necessary) t | rest for or conviction of any Reportable Offense, specify in the space below (or on additional attachments, if the offense for which you have been arrested or convicted, the date and location of arrest and/or conviction, per, and the applicable court. |
| Section 4. | . Certification |
| correct, and report any a | his form, I swear and affirm under penalty of law that the statements made in this form are true, accurate, complete. I understand that false statements herein, including, without limitation, any failure to accurately rrest or conviction for a Reportable Offense, shall subject me to criminal prosecution under 18 Pa.C.S. ting to unsworn falsification to authorities. |

Date

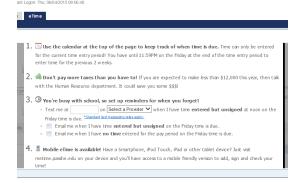
Signature

E-Time Instructions - STUDENT

1. Log into the Employee Self-Service (ESS) system and select the eTime tab. If you have not logged into ESS in the past, you will need to contact UTech Services for your username and password. NOTE: Deadline for input of hours is 11:59 PM on last day of each pay period.

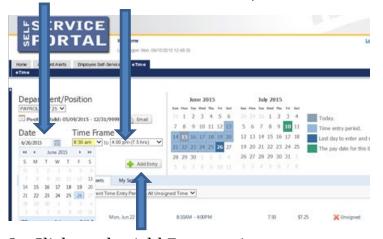


NOTE: First time users may see a settings screen and a tutorial appear. Please follow the tutorial and adjust your settings.





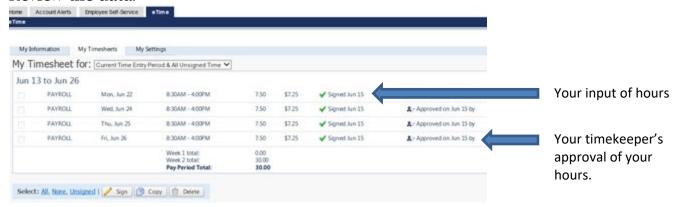
2. Choose date and select start/end times.



- 3. Click on the Add Entry option.
- 4. Input the code.



5. Review the data.



Setting Options:

| Email |
|---|
| ▼ Email when time is entered for me This value cannot be changed and will always be active. |
| ▼ Email when time is deleted for me This value cannot be changed and will always be active. |
| Email when unsigned time is approved . |
| Email me on the Fri v before the end of the time entry period if I have unsigned time. |
| Email me on the Thur before the end of the time entry period and I have no time entered. NOTE: You must have entered time at least once in eTime for this setting to work. |
| Email when my password is 14 days from expiring. |
| Text |
| ✓ *Text me at 7175551212 On AT&T |
| Time Entry |
| Enable audio feedback on the sign time screen. NOTE: This feature does not work with Internet Explorer 7 or 8. |
| Choose a default department/position |
| No default department chosen. |
| Set default start time to |
| © Current Time |
| Choose a specific time |
| Set the Starting Hours dropdown box to only show time between: |
| Show All Time |
| O Specify Hours |
| ♣ Save Settings |

Frequently Asked Questions:

Why are the first two options grayed out? I don't want to be emailed!

Sorry, but you need to be notified when time is entered for you. You still need to sign time entered for you, and if you aren't notified you might not sign the entries before they are due. You are also notified when time is deleted, so you know why hours you were expecting to be paid for have disappeared.

What does 'set default start time to' mean?

On the Time Entry screen above, the default start time is set to the current hour and the minute is rounded to the closest 1/4 hour (e.g. 8:07 is rounded up to 8:15). If you would rather have the default time be something other than this, you can change it with this setting.

Why would I set the setting for 'Choose a default cost center/position'?

Some students are assigned multiple positions which they may not use frequently. If there is a department or position you normally use, you can choose it to be the default so you have one less button to click each time you enter time.

I only work between 8AM and 4:30PM, can I hide the other hours from the dropdown?

Yes! You can specify the hours to display in the dropdown so you only see hours you would work. If your schedule changes for any reason, you can either change it, or show all hours again.

What does 'Standard text messaging rates apply' mean?

If you pay for each text message sent or received, or you go over your allotted text message amounts, you may be charged by your service provider. Please check with your cell phone company for applicable rates. Unlimited texting plans have no limits and therefore do not accrue any extra fees.

Are there other settings planned for the future?

None are planned at this time. If you have a suggestion for a setting we may have missed, please let us know on the feedback page.