Enter W4 Forms Manually

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When you need to enter an employee's W4 form manually (from a paper printout) follow the steps below.

We recommend that whenever possible, you have your employees complete this form electronically within Wurk to streamline data entry. This method is typically built into your Employee Onboarding Checklist so that the employee is automatically prompted to fill out the W4 form as part of the hiring process. If your checklist does not include this form, then the employee will have to complete a paper form and deliver it to you by hand or as a PDF. These forms are available here.

START HERE

1. Navigate to the information record for the employee (under **Team>MyTeam>Employe Information**).

To quickly navigate to an employee record, you can search for them by name in the Search field at the top of the main menu.

2. On the Employee Payroll tab, scroll to the **Tax Information** area.

3. Set **FORM 2020 W4** to **Yes**.

4. Copy information from the form the employee gave you to the fields in Wurk following the guide below.

IRS Form

Field (in Wurk) matches...	Area on Printed Form
FILING STATUS	Step 1 c)
TWO JOBS	Step 2
CLAIMED DEPENDENTS	Step 3
OTHER INCOME	Step 4a
DEDUCTION	Step 4b
ADDITIONAL WITHHOLDING	Step 4c

The **OVERRIDE** field will completely override the deductions set in the W4 form. For example, if you set it to 1000, it will deduct 1000 *instead* of the amounts from the form. We recommend that you do not use this field and if so consult first with your tax advisor.

5. **SAVE** your entries.

NOTE: If the state where the employee works requires a State W4, and the employee has provided this form, you can enter this information from the **State** tab at the top of the Tax Information area.