Crosswalk for the IRS 2024 W4 to the SAP ESS W4 Tax Service

Below maps the sections (Steps) of the new 2024 W-4 form and how they correspond to the following fields in the new ESS W-4 form.

The new 2024 W-4 form has no allowances. Allowances have been replaced with actual dollar adjustments for dependents and other adjustments to taxes. Please note, information is now noted in dollars as is indicated by the USD notation at the end of each field on the ESS federal W-4 form.

There is no field for claiming tax exemption. The employee should write “Exempt” on the W-4 form in the space below Step 4(c).

The new 2024 W-4 form is broken down into 5 parts.

Two sections must be completed to be a valid form:

- Step 1 - Personal Information -
  - Name, Address, City, State and Zip
  - Filing Status: Single, Married filing Separate, Married filing Jointly, Head of Household

- Step 5 - Signature and Date

The other remaining sections are optional:
- Step 2  Multiple Jobs or Spouse Works
- Step 3  Claim Dependents
- Step 4  Other Adjustments

### Federal Employee Withholding Certificate - W4 Form

#### Mandatory fields: Step 1 Personal Information and Step 5 Signature and Data

#### Step 1 Personal address information & Filing Status

<table>
<thead>
<tr>
<th>W-4</th>
<th>Employee’s Withholding Certificate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Form</td>
<td>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. Your withholding is subject to review by the IRS.</td>
</tr>
<tr>
<td>2024</td>
<td></td>
</tr>
</tbody>
</table>

- **Step 1:** Enter Personal Information
  - First Name: Patricia
  - Last Name: O’Donnell
  - Address: 30 Long View Way
  - City or town, state, and ZIP code: Baltimore, MD 21208

- Single or Married filing separately
- Married filing jointly or Qualifying surviving spouse
- Head of household

### SAP Employee Self Service

#### In ESS, the personal address data populates from Permanent Address field in ESS or SAP Master Data

#### Step 5 Signature and Date

- **Step 5:** Sign Here
  - Patricia O’Donnell
  - Employee’s signature (This form is not valid unless you sign it)
  - Date

- Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.

- **Declaration:** Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete: 11/12/2020
Optional Fields.
If an employee makes any election in these fields (Steps 2, 3 or 4), there are corresponding entries in the new ESS W-4 form. The amounts are reported as dollars and represent an annual amount with the exception of row 4(c) Extra Withholding which is a per pay amount.

Step 2 Multiple Jobs or Spouse Works – employee checks box in row 2(c) of W-4 form

In the ESS W-4 form employee must check the box indicated ‘Use Higher Withholding Rates Schedule’.

Step 3 Claim Dependents – Employees only enter in ESS the final total in row 3 of the W-4 form

In the ESS W-4 form employee will indicate the dollar amount from line 3 in the ESS field ‘Total credits for Dependents’.

Step 4 Optional Other Adjustments – employee enters the amounts from rows 4(a) Other income, 4(b) Deductions, or 4(c) Extra withholding. Please note that the dollar amount entered for 4(a) and 4(b) represent the annual dollar adjustment. The adjustment for 4(c) Extra Withholding is a per pay period adjustment.

For ESS purposes the employee would list the amounts for 4(a) Other income, 4(b) Deductions in the ESS fields labeled ‘Other Income’ and ‘Additional Deductions’ respectively. As noted above these amounts are annual amounts. Item 4(c) from the W-4 form would be indicated on the ESS field labeled ‘Additional amount, if any, you want withheld from each paycheck’. Note that these are all recorded as monetary items.