

## FREQUENTLY ASKED QUESTIONS REGARDING INCOME TAX WITHHOLDING AND W-4 FORMS

### Local Office Questions

- Q. What happened if a Homecare Worker (HCW) refused or failed to send in W-4 form?
- A. Their income taxes were withheld at the highest rate (single and zero withholdings).
- Q. Does the local SPD/AAA office have to accept information on the W-4 form they know to be false? For example, what if a married HCW is claiming single status on their taxes?
- A. No, you do not have to accept information you know to be false. You should ask the Homecare Worker to complete the form correctly.
- Q. What do we do with incomplete forms that have certain fields left blank, or that are missing a signature?
- A. You can return the form to the Homecare Worker, especially for something like a missing signature. For minor pieces of missing information, you could choose to call the Homecare Worker to clarify what they wanted on the form. You could complete and add your initials next to the information you added.
- Q. How long do we need to keep the W-4 forms in the provider file?
- A. Per tax law, W-4s need to be kept on file for at least four years.

### Homecare Worker Questions

- Q. I read that completing the W-4 form is voluntary but I am being told that completing the W-4 form is mandatory. Which is correct?

A. Tax withholding is not voluntary. SEIU Local 503, OPEU is the union that represents HCWs in the bargaining unit. The union entered into an agreement with the Home Care Commission to have DHS withhold income taxes for Homecare Workers. Tax withholding was something that Homecare union members wanted and negotiated.

Q. How can I file separate state and federal W-4 forms with different withholding amounts?

A. You can complete two W-4 forms and write "state" at the top of one form and "federal" on the top of the other form in pen.

Q. Can I request to have an additional amount taken out of my taxes?

A. Yes, you can.

Q. If I claim exempt, do I ever have to send in the W-4 form more than once?

A. The W-4 form indicates how long the current exemption will remain active prior to expiration. The 2005 W-4 form indicates that the current exemption expires 02-16-06. A new W-4 form would need to be filed once the exemption expires.

Q. Where can I get help in completing my W-4 form?

A. You can contact a tax expert or the Internal Revenue Service (IRS) at 1-800-829-1040, or the Department of Revenue, at 1-800-356-4222.