

## **W-4 Frequently Asked Questions**

### **1. Do I have to fill out a separate form for State and Federal Taxes?**

Yes, there is a separate form for Federal and State withholdings. Forms can be accessed on the SJC Auditor-Controller's website (<https://www.sjgov.org/departments/aud/default>).

- Federal – Form W-4
- State – Form DE-4

### **2. Where do I enter the number of allowance I want to claim?**

The new W-4 form does not allow people to choose a number of allowances. Instead, you provide certain dollar estimates for the payroll system to use. The IRS has a Tax Withholding Estimator that can be used to help make sure you have the right amount of tax withheld from your paycheck.

### **3. Do I have to complete the entire form?**

No, Steps 1 and 5 are required. Any missing information in Steps 1 or 5 will result in your form not being processed.

Steps 2, 3 and 4 are to be completed if certain criteria apply.

### **4. How do I claim EXEMPT?**

If you meet the criteria for filing exempt, write in EXEMPT on 4(d) of the W-4 form. You can find the exemption criteria on the IRS General Instructions page.

### **5. What is the deadline for submitting forms?**

Forms must be received in the Auditor Controller Payroll Office by 4:30 p.m. on non-payday Friday (or the last working day of that week in case of a holiday) to be effective on the following paycheck. Any forms received late will apply to a future paycheck.

### **6. Where do I submit the form?**

The Auditor Controller – Payroll Office will accept forms in the following ways:

Note – the preferred method to receive W-4 documents is via fax. We will accept forms via Interoffice Mail or US Mail but these methods may result in a delay in processing.

Fax: (209) 468-0408 **(Preferred)**

Interoffice  
Mail: Auditor Controller – Payroll Office

Mail: Auditor Controller – Payroll Office  
44 N. San Joaquin Street, Suite 550  
Stockton, CA 95202