

Approving an Employee's W-4 Form Change Request

Advanced HR 2.0 provides the ability for employees to make changes to their W-4 Form (Employee's Withholding Allowance Certificate) and once complete, the system will send the employee's W-4 Form change request to the Manager/Admin for approval. Once the request has been approved by the Manager/Admin, the new information will then flow to payroll.

Note that out of the box, the system by default allows the approval requests to be submitted to Manager level and up (Admin, etc.). This is controlled in the system by who you have the individual employee set to report to (on the Employment Detail screen – in the Reports To/Supervisor section).

Manager/Admin Approves an Employee's W-4 Form Change Request

After the employee submits an W-4 Form change request, the Manager/Admin will receive an email notification of the pending W-4 Form change request, similar to the one shown below.



The Manager/Admin can also see that there is a pending W-4 Form change request waiting for them to approve on the

right side of their company **Dashboard**, as shown below.



To approve the pending W-4 Form change requests:

1. Click on the **Open/Approve** icon on the Dashboard **Employee W-4s (Pending)** section, or, you can navigate directly to the **HR Admin – Employee Maintenance – W4** screen.
2. The system displays the **W-4** screen.

The screenshot shows the "W-4" screen with a grid of W-4 Form change requests. The grid has columns for Actions, Name, Employee ID, W-4 Status, Download, Form Date, Approved/Rejected, and Approved/Rejected By. The third row shows a "Pending" status, which is highlighted with a red box. Below the grid, there is a pagination bar showing "Page: 1 of 1" and "Page size: 3".

Actions	Name	Employee ID	W-4 Status	Download	Form Date	Approved/Rejected	Approved/Rejected By
	Nielsen, jennifer	48	Approved		09/05/2018		
	Nielsen, jennifer	48	Approved		10/24/2018	10/24/2018 04:46 PM	manager1@sharktasers.com
	Nielsen, jennifer	48	Pending		10/25/2018		

The **W-4** screen lists all W-4 Form change requests in the grid with the employee Name and ID, the W-4 Status, the submitted Form Date and the Approved/Rejected date – if applicable, and by whom. You can click on the PDF icon in the Download column if you want to download the employee's W-4 Form to your PC.

3. Click on a row with a **W-4 Status** of **Pending** to display the W-4 Form Change Request from the Employee.
4. The system displays the **W-4 Status (Submitted – Pending Approval)** screen for the pending change request.

W-4 Status: Submitted - Pending Approval

W-4 - Submit New Employee Withholding Allowance Certificate
For complete instructions and W-4 worksheets, please use this [\(W-4 Link\)](#).

This W-4 record has been SUBMITTED. It cannot be edited.

BOX 1 - Name/Address First Name jennifer Middle Initial Middle Initial Last Name Nielsen Address 532 Sample St City South Burlington State VT - VERMONT, US Zip Code 05403	BOX 2 - ID SSN 514-31-4141	BOX 5,6,7 - Elections Total number of allowances you are claiming BOX 5 22 Additional amount, if any, you want withheld from each paycheck BOX 6 \$ Additional Amount I claim exemption from withholding for the current tax year, and I certify that I meet both of the following conditions for exemption. • Last year I had a right to a refund of all federal income tax withheld because I had no tax liability, and • This year I expect a refund of all federal income tax withheld because I expect to have no tax liability If you meet both conditions, type "Exempt" below BOX 7 If Exempt type "Exempt"
BOX 3 - Status Single No Yes Married No Yes Married, but withhold at higher single rate No Yes		
BOX 4 - Last Name Differs If your last name differs from that shown on your social security card, check YES No Yes		

E-Signature

I have read my rights under the the (E-Sign Act). By typing my name below, I understand I am electronically signing this document and agreeing to its terms.

Type your name here

jennifer Nielsen

Form Date

09/05/2018

jennifer Nielsen

W-4 - Attached PDF

PDF will be generated for download after this W-4 has been submitted for approval.

W-4 PDF

Download	Filename	Size (KB)	Date	Remove Link
	formw4.pdf	352	09/05/2018	

5. Review the information and, if applicable, in the **W-4 Approval** section at the bottom of the screen, click the **Approve W-4 Application** button.

W-4 - Approval

Click below to change the state of this W-4. If the W-4 is approved and you are connected to Payroll, the information will be sent to Payroll. Pending, Approved, and Rejected W-4 records may not be changed. Employees wishing to change their W-4 information must do so by creating a new record and submitting it for approval (Menu: My Payroll - My W-4).

Approve W-4 Application

Reject W-4 Application

Or, click the **Reject W-4 Application** button to reject the employee's W-4 Form change request.

The system returns you to the W-4 dashboard screen. The **Status** of the W-4 screen you just approved changes to **Approved**. If you click on the same W-4 change row again, the system displays the W-4 screen showing the **Status: Approved**, as indicated below.

W-4 Status: **Approved**

W-4 - Submit New Employee Withholding Allowance Certificate

For complete instructions and W-4 worksheets, please use this [\(W-4 Link\)](#).

This W-4 record is already APPROVED. It cannot be edited. These data fields are shown for reference only and may not be correct; please refer to the attached PDF for the definite values.

BOX 1 - Name/Address

First Name*
Stephen

Middle Initial
Middle Initial

Last Name*
Brown

Address*
88 Greenway Drive

City*
Burlington

State*
VT - VERMONT, US

Zip Code*
05401

BOX 2 - ID

SSN*
988-55-2236

BOX 3 - Status

Single
 NO YES

Married
 NO YES

Married, but withhold at higher single rate
 NO YES

BOX 4 - Last Name Different

If your last name differs from that shown on your social security card, check YES
 NO YES

BOX 5,6,7 - Elections

Total number of allowances you are claiming
BOX 5
5

Additional amount, if any, you want withheld from each paycheck
BOX 6
\$ Additional Amount

I claim exemption from withholding for the current tax year, and I certify that I meet both of the following conditions for exemption.

- Last year I had a right to a refund of all federal income tax withheld because I had no tax liability, and
- This year I expect a refund of all federal income tax withheld because I expect to have no tax liability.

If you meet both conditions, type "Exempt" below
BOX 7

If Exempt type 'Exempt'

E-Signature

I have read my rights under the the (E-Sign Act). By typing my name below, I understand I am electronically signing this document and agreeing to its terms.

Type your name here*

Stephan Brown
Stephan Brown

Form Date*

02/21/2019

W-4 - Attached PDF

PDF will be generated for download after this W-4 has been submitted for approval.

W-4 PDF

Download	Filename	Size (KB)	Date	Remove Link
	formw4.pdf	728	02/21/2019	