Guidelines for W-4 Completion

No white out can be used on the form, any scratch outs must have employee initials next to the correction.

Federal W-4 Form

Box 1 Must be printed and complete.
Box 2 Must be complete with a Nine-Digit Number.
Box 3 Must have a check mark in one box only. If none are marked the form is considered invalid.
Box 4 Unless individual’s name on form differs from their name on their Social Security Card leave it blank.
Box 5 This box is assumed to be a zero if left blank, and does not have to match the total on line H in the Personal Allowances Worksheet.
Box 6 This box is assumed to be a zero if left blank.
Box 7 If the word “exempt” is written in this box, then boxes 5 and 6 MUST BE BLANK, if not return to individual and point out to them that having entries in box 5, 6, AND 7 makes the form invalid. You may not advise them on what they should complete in each box, just point out in the instructions (at the top of the form) that if they WISH to claim exempt they must complete ONLY lines 1, 2, 3, 4, and 7. If the form is not completed correctly, the individual will be setup, by IRS regulation, as taxable at the highest rate of Single with Zero allowances.

Employee Signature Form is considered invalid without signature.

Date Must be the date the form is signed, back dating is not allowed.

Missouri W-4 Form

Full Name Must be printed and complete.
Social Security Number Must be complete with a Nine-Digit Number.
Filing Status Must have one of the three options check marked, if none are marked the form is considered invalid and the individual will be setup, by IRS regulation, as taxable at the highest rate of Single with Zero allowances. If married status is marked, Box 2 needs to be completed with Yes or No.
Home Address Must be printed and complete.
City, State, and Zip Must be completed.
Box 1-4 Completed at the employee’s discretion and choice. Box 2 needs to be completed with Y or N if employee checks mark married status.
Box 5 This box must be equal to the total of boxes 1-4, if not it is invalid.
Box 6 This box is assumed to be a zero if left blank.
Box 7 If the word “exempt” is written in this box, then boxes 5 and 6 MUST BE BLANK, if not return to individual and point out to them that having entries in box 5, 6, AND 7 makes the form invalid. You may not advise them on what they should complete in each box, just point out in the instructions that if they WISH to claim exempt they must complete ONLY lines 1, 2, 3, 4, and 7. If the form is not completed correctly, the individual will be setup, by IRS regulation, as taxable at the highest rate of Single with Zero allowances.

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