Office of Human Resources

Name Change Packet

Benefit forms need to be completed when a benefit eligible staff or faculty member changes address, marital status, and/or benefit plan enrollment. These forms need to be completed and returned to the Human Resources office within 30 days of the qualifying event and/or status change.

✓ Qualifying Events: A change in your situation — like getting married, having a baby, or losing health coverage — that can allow benefit plan changes outside the yearly Open Enrollment Period
✓ Verifying dependents: When enrolling a spouse or child (or changing a spouse or child’s enrollment) in University Benefits, documentation demonstrating the current spousal or child relationship may be required

You only need to complete the forms that pertain to you. Documentation of name change must accompany the request for name change.

Forms to be returned for a name change:

- Office of Human Resources Data Change Form
- W-4 (only if you wish to change your federal withholding)
- Residency Certification
- Retirement Vendor Information Change Form
  - Only complete the form for the vendor you have an account with

All forms are available in the Office of Human Resources, St Thomas Hall room 100

SCRANTON, PENNSYLVANIA 18510-4668
(570) 941-7767 FAX: (570) 941-4636
Office of Human Resources
Data Change Form

Please print all information in ink.

Name: ___________________________ R# __________________

Effective Date of Change: __________________

Check the appropriate box(es) to indicate a change to my personal information as indicated below:

☐ Name: ___________________________
   (Please provide supporting documentation i.e. marriage certificate, divorce decree, etc.)

☐ Physical Address: ___________________________
   If different, provide Mailing:
   ___________________________
   ___________________________
   ___________________________

☐ Telephone Number: ___________________________
   Home ☐ Cell ☐

☐ Marital Status: Please provide supporting documentation i.e. marriage certificate, divorce decree, etc.
   Single ☐ Married ☐ Widowed ☐ Divorced ☐

☐ Add ☐ Remove the following spouse/dependent(s):
   Please provide supporting documentation i.e. birth certificate, marriage license, divorce decree, etc

<table>
<thead>
<tr>
<th>Name</th>
<th>Relationship</th>
<th>Gender</th>
<th>Date of Birth</th>
<th>Social Security #</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>☐ Spouse ☐ Dependent</td>
<td>☐ Male ☐ Female</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>☐ Spouse ☐ Dependent</td>
<td>☐ Male ☐ Female</td>
<td></td>
<td></td>
</tr>
<tr>
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<td>☐ Spouse ☐ Dependent</td>
<td>☐ Male ☐ Female</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>☐ Spouse ☐ Dependent</td>
<td>☐ Male ☐ Female</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Change emergency contact person: (If applicable)

(Name)

(Address)

(City, State, Zip)

(Phone Number)

(Signature)

(Date)

Highmark ☐
UCCI ☐
COBRA ☐

Received in HR ____________ Date Completed ____________
Employee’s Withholding Certificate

Step 1:
Enter Personal Information

- First name and middle initial
- Last name
- Address
- City or town, state, and ZIP code

- Single or Married filing separately
- Married filing jointly or Qualifying widow(er)
- Head of household (Check only if you’re unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual)

Complete Steps 2–4 ONLY if they apply to you; otherwise, skip to Step 5. See page 2 for more information on each step, who can claim exemption from withholding, when to use the estimator at www.irs.gov/W4App, and privacy.

Step 2: Multiple Jobs or Spouse Works

Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs.

Do only one of the following:
(a) Use the estimator at www.irs.gov/W4App for most accurate withholding for this step (and Steps 3–4); or
(b) Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below for roughly accurate withholding; or
(c) If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld.

TIP: To be accurate, submit a 2022 Form W-4 for all other jobs. If you (or your spouse) have self-employment income, including as an independent contractor, use the estimator.

Complete Steps 3–4(b) on Form W-4 for only ONE of these jobs. Leave those steps blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3–4(b) on the Form W-4 for the highest paying job.)

Step 3: Claim Dependents

- If your total income will be $200,000 or less ($400,000 or less if married filing jointly):
  - Multiply the number of qualifying children under age 17 by $2,000 $
  - Multiply the number of other dependents by $500 $

Add the amounts above and enter the total here $3 $

Step 4 (optional): Other Adjustments

- Other Income (not from Jobs). If you want tax withheld for other income you expect this year that won’t have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income $4(a) $

- Deductions. If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use the Deductions Worksheet on page 3 and enter the result here $4(b) $

- Extra withholding. Enter any additional tax you want withheld each pay period $4(c) $

Step 5: Sign Here

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

Employee’s signature (This form is not valid unless you sign it.)

Date

Employers Only

Employer’s name and address

First date of employment

Employer Identification number (EIN)

For Privacy Act and Paperwork Reduction Act Notice, see page 3.
General Instructions
Section references are to the Internal Revenue Code.

Future Developments
For the latest information about developments related to Form W-4, such as legislation enacted after it was published, go to www.irs.gov/FormW4.

Purpose of Form
Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. If too little is withheld, you will generally owe tax when you file your tax return and may owe a penalty. If too much is withheld, you will generally be due a refund. Complete a new Form W-4 when changes to your personal or financial situation would change the entries on the form. For more information on withholding and when you must furnish a new Form W-4, see Pub. 505, Tax Withholding and Estimated Tax.

Exemption from Withholding. You may claim exemption from withholding for 2022 if you meet both of the following conditions: you had no federal income tax liability in 2021 and you expect to have no federal income tax liability in 2022. You had no federal income tax liability in 2021 if (1) your total tax on line 24 on your 2021 Form 1040 or 1040-SR is zero or less than the sum of lines 27a, 28, 29, and 30, or (2) you were not required to file a return because your income was below the filing threshold for your correct filing status. If you claim exemption, you will have no income tax withheld from your paycheck and may owe taxes and penalties when you file your 2022 tax return. To claim exemption from withholding, certify that you meet both of the conditions above by writing "Exempt" on Form W-4 in the space below Step 4(c). Then, complete Steps 1(a), 1(b), and 5. Do not complete any other steps. You will need to submit a new Form W-4 by February 15, 2023.

Your privacy. If you prefer to limit information provided in Steps 2 through 4, use the online estimator, which will also increase accuracy.

As an alternative to the estimator: If you have concerns with Step 2(c), you may choose Step 2(b); If you have concerns with Step 2(a), you may enter an additional amount you want withheld per pay period in Step 2(c). If this is the only job in your household, you may instead check the box in Step 2(c), which will increase your withholding and significantly reduce your paycheck (often by thousands of dollars over the year).

When to use the estimator. Consider using the estimator at www.irs.gov/FormW4App if you:
1. Expect to work only part of the year;
2. Have dividend or capital gain income, or are subject to additional taxes, such as Additional Medicare Tax;
3. Have self-employment income (see below); or
4. Prefer the most accurate withholding for multiple job situations.

Self-employment. Generally, you will owe both income and self-employment taxes on any self-employment income you receive separate from the wages you receive as an employee. If you want to pay these taxes through withholding from your wages, use the estimator at www.irs.gov/FormW4App to figure the amount to have withheld.

Nonresident alien. If you're a nonresident alien, see Notice 1392, Supplemental Form W-4 Instructions for Nonresident Aliens, before completing this form.

Specific Instructions
Step 1(c). Check your anticipated filing status. This will determine the standard deduction and tax rates used to compute your withholding.

Step 2. Use this step if you (1) have more than one job at the same time, or (2) are married filing jointly and you and your spouse both work.

Option (a) most accurately calculates the additional tax you need to have withheld, while option (b) does so with a little less accuracy.

If you (and your spouse) have a total of only two jobs, you may instead check the box in option (o). The box must also be checked on the Form W-4 for the other job. If the box is checked, the standard deduction and tax brackets will be cut in half for each job to calculate withholding. This option is roughly accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld, and this extra amount will be larger the greater the difference in pay is between the two jobs.

Multiple Jobs. Complete Steps 3 through 4(b) on only one Form W-4. Withholding will be most accurate if you do this on the Form W-4 for the highest paying job.

Step 3. This step provides instructions for determining the amount of the child tax credit and the credit for other dependents that you may be able to claim when you file your tax return. To qualify for the child tax credit, the child must be under age 17 as of December 31, must be your dependent who generally lives with you for more than half the year, and must have the required social security number. You may be able to claim a credit for other dependents for whom a child tax credit cannot be claimed, such as an older child or a qualifying relative. For additional eligibility requirements for these credits, see Pub. 501, Dependents, Standard Deduction, and Filing Information. You can also include other tax credits for which you are eligible in this step, such as the foreign tax credit and the education tax credits. To do so, add an estimate of the amount for the year to your credits for dependents and enter the total amount in Step 3. Including these credits will increase your paycheck and reduce the amount of any refund you may receive when you file your tax return.

Step 4 (optional).

Step 4(a). Enter in this step the total of your other estimated income for the year, if any. You shouldn't include income from any jobs or self-employment. If you complete Step 4(a), you likely won't have to make estimated tax payments for that income. If you prefer to pay estimated tax rather than having tax on other income withheld from your paycheck, see Form 1040-ES, Estimated Tax for Individuals.

Step 4(b). Enter in this step the amount from the Deductions Worksheet, line 5, if you expect to claim deductions other than the basic standard deduction on your 2022 tax return and want to reduce your withholding to account for these deductions. This includes both itemized deductions and other deductions such as for student loan interest and IRAs.

Step 4(c). Enter in this step any additional tax you want withheld from your pay each pay period, including any amounts from the Multiple Jobs Worksheet, line 4. Entering an amount here will reduce your paycheck and will either increase your refund or reduce any amount of tax that you owe.
Step 2(b) — Multiple Jobs Worksheet (Keep for your records.)

If you choose the option in Step 2(b) on Form W-4, complete this worksheet (which calculates the total extra tax for all jobs) on only ONE Form W-4. Withholding will be most accurate if you complete the worksheet and enter the result on the Form W-4 for the highest paying job.

Note: If more than one job has annual wages of more than $120,000 or there are more than three jobs, see Pub. 505 for additional tables; or, you can use the online withholding estimator at www.irs.gov/W4App.

1 Two Jobs. If you have two jobs or you're married filing jointly and you and your spouse each have one job, find the amount from the appropriate table on page 4. Using the "Higher Paying Job" row and the "Lower Paying Job" column, find the value at the intersection of the two household salaries and enter that value on line 1. Then, skip to line 3.

2 Three Jobs. If you and/or your spouse have three jobs at the same time; complete lines 2a, 2b, and 2c below. Otherwise, skip to line 3.

   a Find the amount from the appropriate table on page 4 using the annual wages from the highest paying job in the "Higher Paying Job" row and the annual wages for your next highest paying job in the "Lower Paying Job" column. Find the value at the intersection of the two household salaries and enter that value on line 2a.

   b Add the annual wages of the two highest paying jobs from line 2a together and use the total as the wages in the "Higher Paying Job" row and use the annual wages for your third job in the "Lower Paying Job" column to find the amount from the appropriate table on page 4 and enter this amount on line 2b.

   c Add the amounts from lines 2a and 2b and enter the result on line 2c.

3 Enter the number of pay periods per year for the highest paying job. For example, if that job pays weekly, enter 52; if it pays every other week, enter 26; if it pays monthly, enter 12, etc.

4 Divide the annual amount on line 1 or line 2c by the number of pay periods on line 3. Enter this amount here and in Step 4(c) of Form W-4 for the highest paying job (along with any other additional amount you want withheld).

Step 4(b) — Deductions Worksheet (Keep for your records.)

1 Enter an estimate of your 2022 itemized deductions (from Schedule A (Form 1040)). Such deductions may include qualifying home mortgage interest, charitable contributions, state and local taxes (up to $10,000), and medical expenses in excess of 7.5% of your income.

2 Enter:

   - $25,900 if you're married filing jointly or qualifying widow(er)
   - $19,400 if you're head of household
   - $12,960 if you're single or married filing separately

3 If line 1 is greater than line 2, subtract line 2 from line 1 and enter the result here. If line 2 is greater than line 1, enter "0."

4 Enter an estimate of your student loan interest, deductible IRA contributions, and certain other adjustments (from Part II of Schedule 1 (Form 1040)). See Pub. 505 for more information.

5 Add lines 3 and 4. Enter the result here and in Step 4(b) of Form W-4.
## Married Filing Jointly or Qualifying Widow(er)

<table>
<thead>
<tr>
<th>Higher Paying Job</th>
<th>Lower Paying Job or Qualifying Widow(er) Annual Taxable Wage &amp; Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>$0 - 9,999</strong></td>
<td><strong>$0 - 9,999</strong></td>
</tr>
<tr>
<td><strong>$10,000 - 19,999</strong></td>
<td><strong>$110 - 19,999</strong></td>
</tr>
<tr>
<td><strong>$20,000 - 29,999</strong></td>
<td><strong>$220 - 29,999</strong></td>
</tr>
<tr>
<td><strong>$30,000 - 39,999</strong></td>
<td><strong>$330 - 39,999</strong></td>
</tr>
<tr>
<td><strong>$40,000 - 49,999</strong></td>
<td><strong>$440 - 49,999</strong></td>
</tr>
<tr>
<td><strong>$50,000 - 59,999</strong></td>
<td><strong>$550 - 59,999</strong></td>
</tr>
<tr>
<td><strong>$60,000 - 69,999</strong></td>
<td><strong>$660 - 69,999</strong></td>
</tr>
<tr>
<td><strong>$70,000 - 79,999</strong></td>
<td><strong>$770 - 79,999</strong></td>
</tr>
<tr>
<td><strong>$80,000 - 89,999</strong></td>
<td><strong>$880 - 89,999</strong></td>
</tr>
<tr>
<td><strong>$90,000 - 99,999</strong></td>
<td><strong>$990 - 99,999</strong></td>
</tr>
<tr>
<td><strong>$100,000 - 120,000</strong></td>
<td><strong>$1100 - 120,000</strong></td>
</tr>
</tbody>
</table>

### Single or Married Filing Separately

<table>
<thead>
<tr>
<th>Higher Paying Job</th>
<th>Lower Paying Job Annual Taxable Wage &amp; Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>$0 - 9,999</strong></td>
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<td><strong>$880 - 89,999</strong></td>
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<tr>
<td><strong>$90,000 - 99,999</strong></td>
<td><strong>$990 - 99,999</strong></td>
</tr>
<tr>
<td><strong>$100,000 - 120,000</strong></td>
<td><strong>$1100 - 120,000</strong></td>
</tr>
</tbody>
</table>

### Head of Household

<table>
<thead>
<tr>
<th>Higher Paying Job</th>
<th>Lower Paying Job Annual Taxable Wage &amp; Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>$0 - 9,999</strong></td>
<td><strong>$0 - 9,999</strong></td>
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<td><strong>$100,000 - 120,000</strong></td>
<td><strong>$1100 - 120,000</strong></td>
</tr>
</tbody>
</table>
**RESIDENCY CERTIFICATION FORM**
Local Earned Income Tax Withholding

**TO EMPLOYERS/TAXPAYERS:**
This form is to be used by employers and/or taxpayers to report essential information for the collection and distribution of Local Earned Income Taxes to the local EIT collector. This form must be utilized by employers when a new employee is hired or when a current employee notifies employer of a name and/or address change. Use the Address Search Application at www.newPA.com/Act32 to determine PSD codes, EIT rates and tax collector contact information.

### EMPLOYEE INFORMATION – RESIDENCE LOCATION

<table>
<thead>
<tr>
<th>NAME (Last Name, First Name, Middle Initial)</th>
<th>SOCIAL SECURITY NUMBER</th>
</tr>
</thead>
<tbody>
<tr>
<td>STREET ADDRESS (No PO Box, RD or RR)</td>
<td></td>
</tr>
<tr>
<td>ADDRESS LINE 2</td>
<td></td>
</tr>
<tr>
<td>CITY</td>
<td>STATE</td>
</tr>
<tr>
<td>MUNICIPALITY (City, Borough or Township)</td>
<td></td>
</tr>
<tr>
<td>COUNTY</td>
<td>RESIDENT PSD CODE</td>
</tr>
</tbody>
</table>

### EMPLOYER INFORMATION – EMPLOYMENT LOCATION

<table>
<thead>
<tr>
<th>EMPLOYER BUSINESS NAME (Use Federal ID Name)</th>
<th>EMPLOYER EIN</th>
</tr>
</thead>
<tbody>
<tr>
<td>University of Scranton</td>
<td>240796495</td>
</tr>
<tr>
<td>STREET ADDRESS WHERE ABOVE EMPLOYEE REPORTS TO WORK (No PO Box, RD or RR)</td>
<td></td>
</tr>
<tr>
<td>800 Linden St</td>
<td></td>
</tr>
<tr>
<td>ADDRESS LINE 2</td>
<td></td>
</tr>
<tr>
<td>CITY</td>
<td>STATE</td>
</tr>
<tr>
<td>Scranton</td>
<td>PA</td>
</tr>
<tr>
<td>MUNICIPALITY (City, Borough or Township)</td>
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</tr>
<tr>
<td>Scranton</td>
<td></td>
</tr>
<tr>
<td>COUNTY</td>
<td>WORK LOCATION PSD CODE</td>
</tr>
<tr>
<td>Lackawanna</td>
<td>360901</td>
</tr>
</tbody>
</table>

### CERTIFICATION

Under penalties of perjury, I (we) declare that I (we) have examined this information, including all accompanying schedules and statements and to the best of my (our) belief, they are true, correct and complete.

<table>
<thead>
<tr>
<th>SIGNATURE OF EMPLOYEE</th>
<th>DATE (MM/DD/YYYY)</th>
</tr>
</thead>
<tbody>
<tr>
<td>PHONE NUMBER</td>
<td>EMAIL ADDRESS</td>
</tr>
</tbody>
</table>

For Information on obtaining the appropriate MUNICIPALITY (City, Borough, Township), PSD CODES and EIT (Earned Income Tax) RATES, please refer to the Pennsylvania Department of Community & Economic Development website:

www.newPA.com/Act32
Section A. Employer Information

Company/Employer Name

Contract/Account No.  Affiliate No.  Division No.

Section B. Personal Information

Social Security No.  Date of Birth (mm/dd/yyyy)

First Name/Middle Initial  Last Name

Mailing Address

City  State  Zip Code

Phone No.  Ext.

E-mail Address

Section C. Personal Information (new)

Complete the appropriate section(s) below to change your account information (attach proof of any name change, e.g. marriage certificate, divorce decree, etc.).

Social Security No.  Date of Birth (mm/dd/yyyy)

First Name/Middle Initial  Last Name

Mailing Address

City  State  Zip Code

Phone No.  Ext.

Please proceed to Section D. on Page 2.
Section D: Signature

I certify that the information provided on this form is correct and complete.

X__________________________  X__________________________
Participant Signature        Date

X__________________________  X__________________________
Print Name                   Social Security Number

If you have questions regarding the completion of this form, please call us at 800-753-5801.

Return your completed form(s) to:

Transamerica
4333 Edgewood Road NE
Mail Drop 0001
Cedar Rapids, IA 52499

Or, you may fax your completed form to 866-835-8863.
TO: TIAA-CREF
FROM: UNIVERSITY OF SCRANTON
       OFFICE OF HUMAN RESOURCES
RE: REQUEST FOR ADDRESS CHANGE
FAX: (800) 914-8922

Please update address for any and all accounts held by the participant listed below.

Print Name: ___________________________   Effective Date of Change: _______________

Social Security Number: ______________

Previous Address

____________________________________

____________________________________

____________________________________

____________________________________

New Address

____________________________________

____________________________________

____________________________________

____________________________________

Signature of Accountholder

Date

Signature of HR Representative

Date