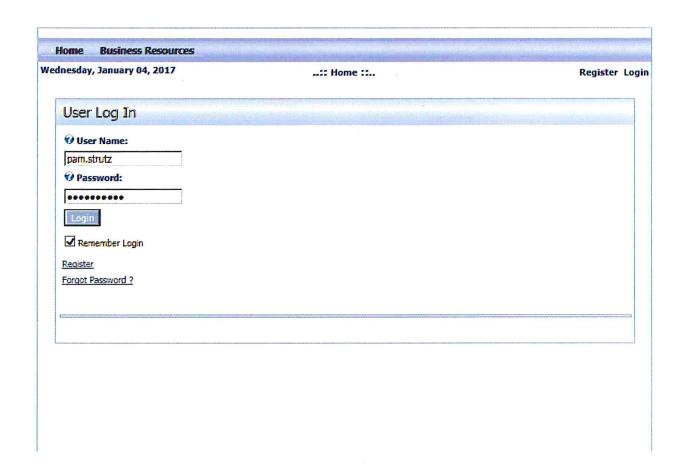
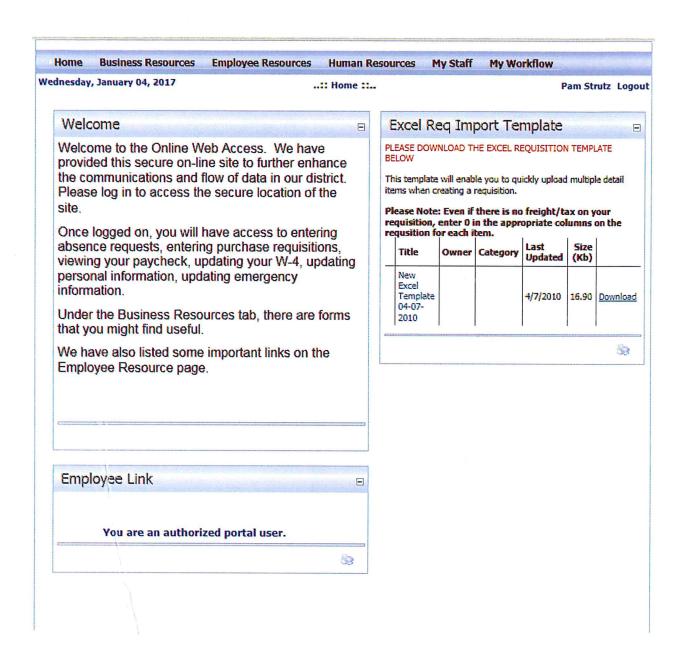


Step 1 – Open the iVision webportal site. This can be found under Staff Resources on the HSD website (located at the bottom of the list on the left side of the Staff Resources page) or use the following web address:

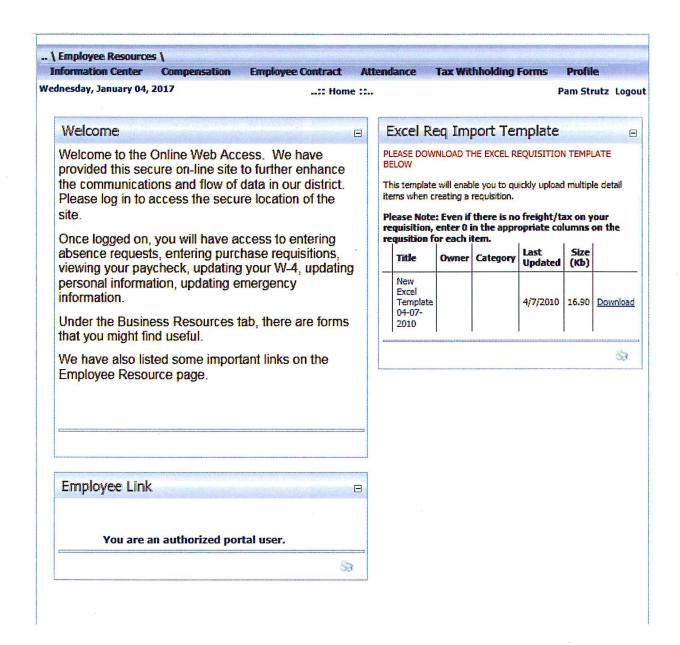
https://bis.lblesd.k12.or.us/harrisburg/Default.aspx



Step 2 – Login to your page on the iVisions Webportal. Your user name should be the same firstname.lastname used for your e-mail address. If you don't remember your password use the Forgot Password link. If you are still having trouble logging in, call the District Office at (541) 995-6626 x365.

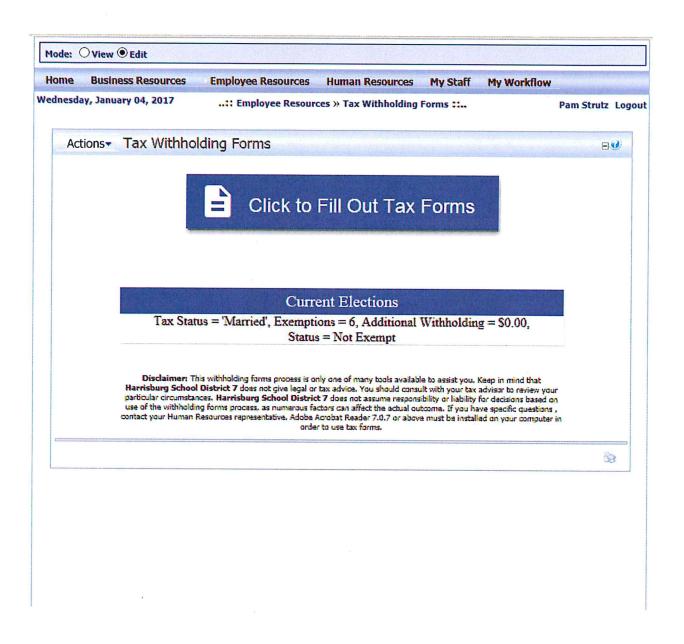


Step 3 – Choose "Employee Resources" from the menu choices at the top of the Welcome page.



Step 4 – Choose "Tax Withholding Forms" from the menu choices at the top of the page.

(Yes, this page looks exactly like the previous page. Unfortunate but true.)



Step 5 – Choose the big blue button "Click to Fill Out Tax Forms". Your current elections are shown so if you decide you don't need to change anything, you can logout (upper right corner) and be done. ©

# **Employee Withholding Resource Center**

# Welcome Pamela Strutz!

The assistant can guide you to the correct forms. You can also choose which forms you would like to fill out if you're certain.

Submitted forms will be reviewed by your Human Resources Department and uploaded to Employee Documents in Misions.

Tip: On the form submission page you may print your forms by using the browsers print function (Ctrl + P in Windows, Cmd Shift P in OSX) and selecting the Portrait layout.



Step 6 – To get started filling out the form you need to choose **"Guide Me"** if you want the system to walk you through the process, or **"Let me choose"** if you want to go straight to the forms. I am only showing the "Let me Choose" process here since the system will guide you if you pick that option.

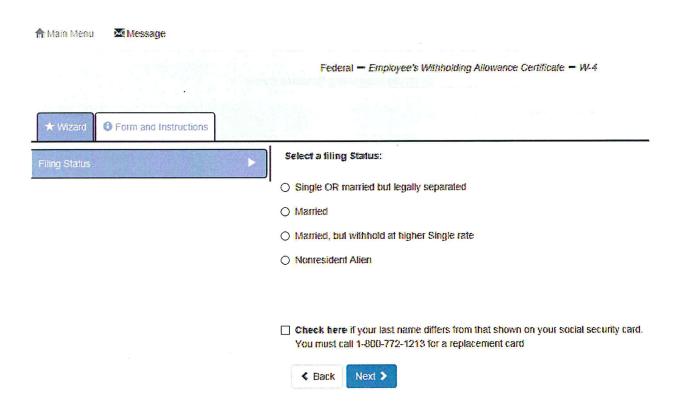
# Employee Withholding Resource Center

Locality	Name	Title	Form type
Federal	W-4	Employee's Withholding Allowance Certificate	resident
Oregon	Federal W-4	Employee's Withholding Allowance Certificate	resident
Federal	W-4(SP)	Certificado de Exencion de la Retencion del(la) Empleado(a)	resident
Federal	8233	Exemption From Withholding on Compensation for Independent (and Certain Dependent) Personal Services of a Nonresident Alien Individual	exempt
Federal	673	Statement For Claiming Exemption From Withholding on Foreign Earned Income Eligible for the Exclusion(s) Provided by Section 911	exempt

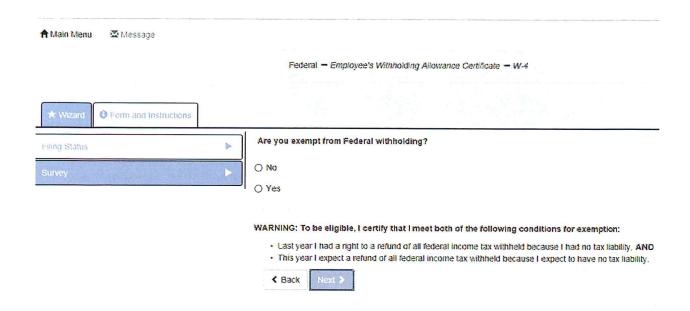
Suggested based on your resident and work addresses



Step 7 – Choose "**Federal W-4**" first. We will deal with the Oregon W-4 later. If any of the other forms listed apply to you are on your own. No, just kidding. © Call the District Office (541) 995-6626 x364 if you need assistance with any of the forms.

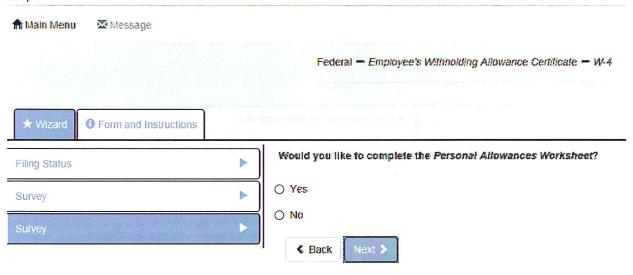


Step 8 – Choose your filing status. DO NOT mark the box that says "Check here" unless your last name has changed since your most recently issued social security card. If this situation applies to you, please call the District Office (541) 995-6626 x364 and let us know that your current name does not match your social security card. Your year-end tax forms that we send the IRS and Social Security Administration will reject if the names do not match, which could cause a delay in the IRS processing your tax return.

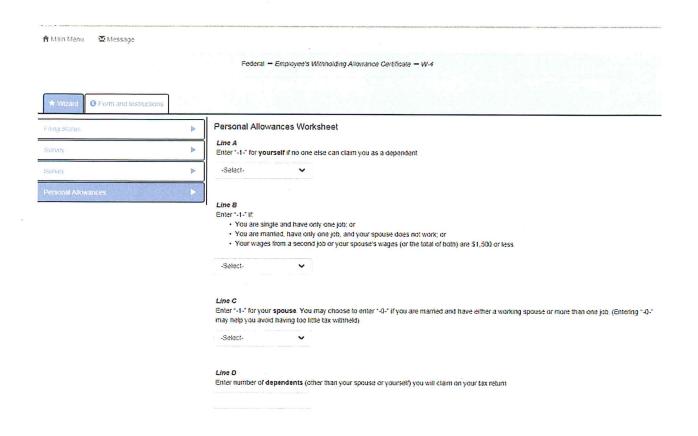


Step 9 – Answer this question by marking "No" or "Yes". You must answer the question. If you are not sure of your status read the warning explanation to be sure before marking "Yes". We are required to send the Oregon Department of Revenue copies of any W-4 forms that claim "Exempt". The IRS no longer requires this, but if they determine you are not having enough tax withheld they will send us a letter specifying the minimum amount that has to be withheld. We are required to comply with this type of notice.

# Step 10 -



Step 10 – The "Personal Allowances Worksheet" walks you through a series of questions to help you determine how many exemptions you should be claiming. See following pages 11-13. If you already know how many exemptions you want to claim select "No", "Next" and skip to page 14 of this document. Otherwise select "Yes", "Next" and follow the directions.



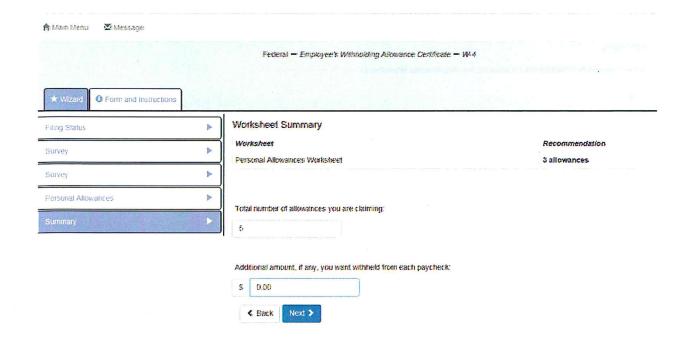
Step 11 – You must select an answer for each question on the Personal Allowances Worksheet. It may be helpful to have your tax return available for reference.

Line E		
Enter *-1-" if you wi	e as head of household on your tax return (see conditions under Head of household)	
-Select-	•	
Line F		
Enter "-1-" if you ha	at least \$2,000 of child or dependent care expenses for which you plan to claim a credit	
( Note. Do not inclu	child support payments. See Pub. 503, Child and Dependent Care Expenses, for details.)	
-Select-		
<ul> <li>This value is r</li> </ul>	uired	
Line G		
Child Tax Credit (i	uding additional child tax credit). See Pub. 972, Child Tax Credit, for more information.	
10 10 10 10 10 10 10 10 10 10 10 10 10 1	me will be less than \$70,000 (\$100,000 if married), enter "2" for each eligible child; then less "1" if you have t or less "2" if you have five or more eligible children	lwo to four
•	me will be between \$70,000 and \$84,000 (\$100,000 and \$119,000 if married), enter "1" for each eligible child	d
The particular in	* · · · · · · · · · · · · · · · · · · ·	
Line H		
the state of the s	and enter total here.	
( Note. This may be	fierent from the number of exemptions you claim on your tax return.)	
3		
Note: This is a comi	ed value	

Step 12 – Answer questions A – G. See Line F above for an example of what happens if you do not answer all the questions. Line H is a calculated amount based on the answers to questions A-G.

You may complete the <i>Deductions and Adjustments Worksheet</i> if you plan to itemize or claim adjustments to income and want to reduce your withholding.
Would you like to complete the Deductions and Adjustments Worksheet?
○ Ne
○ Yes
You may complete the Two-Earners/Multiple Jobs Worksheet If you are single and have more than one job or are married and you and your spouse both work and the combined earnings from all jobs exceed \$40,000 (\$10,000 if married) in order to avoid having too little tax withheld.
Would you like to complete the Two-Earners/Multiple Jobs Worksheet?
○ No
○ Yes
< Back Next ➤

Step 13 – There are two additional worksheets available, if your tax filing situation fits either of options listed above. You DO NOT have to fill out these worksheets to complete your W-4. They are available to assist you in determining your exemption amount. If you choose to use one or both of these forms I would recommend having your last year's tax return on hand for reference. For the purpose of this document, answer "No" to both questions and choose "Next".



Step 14 – If you filled out the Personal Allowances Worksheet the Recommended exemption allowances total is shown in the box on the upper right. You will need to enter the number of allowances you want to claim in the box in the middle of this screen. The system does not automatically enter the Recommended allowances for you so be sure to fill in this box.

Do you want more than what is normally withheld to be deducted from your paycheck? If yes, enter into the blue outlined box the additional dollar amount you want withheld. The amount entered will be deducted in addition to the amount determined by the tax withholding tables.

Remember: the blue outlined box is NOT for the total amount you want withheld each month. If you have a specific total amount you want to have deducted each month, you will need to call the District Office and have us help you determine the amount to put in this box. Call (541) 995-6626 x364.

Federal - Employee's Withholding Allowance Certificate - W-4



### Please review the document below

If you would like to make any changes, you may return to the previous page.

If you would like to submit this form, please agree to the terms below.

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

Please enter the last four of your SSN:



# Form W-4 (2017)

Purpose. Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Consider completing a new Form W-4 such year and when your personal or financial situation changes.

Exemption from withholding. If you are exempt, complete only lines 1, 2, 3, 4, and 7 and sign the form to validate it. Your exemption for 2017 expires Feoruary 15, 2018. See Pub. 505, Tax Withholding and Estmated Tax.

Note: it another person can claim you as a dependent on his or her tax return, you can't claim exemption from withholding it your total income exceeds \$1.050 and includes more than \$350 of unearned income (for example, interest and dividends).

Exceptions. An employee may be able to claim exemption from withholding even if the employee is

The exceptions don't apply to supplemental wages greater than \$1,000,000.

greater than si Josophus.

Basic instructions, If you aren't exempt, complete the Personal Allowances Worksheet below. The worksheets on page 2 further adjust your withholding allowances based on itemized deductions, certain credits, adjustments to income, or two-earners/murbole jobs situations.

or two-earners morphe loos strations.

Complete all worksheets that apply. However, you may claim fewer for zero) allowances. For regular wages, withholding must be based on allowances you claimed and may not be a flat amount or percentage of wages.

percentage of wages. Head of household. Generally, you can claim head of household filling status on your tax return only it you are unmarred and pay more than 50% of the costs of keeping up a home for yourself and your dependently or other qualifying endividuals. See Pub. 501, Exemptions, Standard Deduction, and Filling Information. For Information. Norwage income. If you have a large amount of norwage income, such as interest or dividends, consider making estimated fax asymmets using Form 1646 ES, Estimated Tax for Individuals. Otherwise, you may owe additional lax. If you have gension or additional lax. If you have gension or additional lax. If you have greater or a special property of the control of the co

Two earners or multiple jobs. If you have a working spouse or multiple jobs. If you have a working spouse or more than one job, figure the total number of allowances you are entitled to claim on all jobs using worksheets from only one Form W-4. Your withfolding usually will be most accurate when all allowances are claimed on the Form W-4 for the highest naying job and zero allowances are claimed on the others. See Pub. 505 for details

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

Check your withholding. After your Form W-4 takes effect, use Pub. 505 to see how the amount you are hadron withhold companies to their street and the second and their seco

Step 15 – Since a W-4 form is a legal document you must electronically sign the form clicking the box by the statement "Under penalties..." and by entering the last 4 digits of your Social Security Number. Choose "Submit Form" and you are almost done.



Your form has been submitted!

Do more forms

Sign out

# Form W-4 (2017)

Purpose. Complete Form W-4 so that your employer can withhold the correct federal income suppoyer can withing the correct regeral income tax from your pay. Consider completing a new Form W-4 each year and when your personal or financial situation changes.

Exemption from withholding. If you are exempt, complete only lines 1, 2, 3, 4, and 7 and sign the form to validate it. Your exemption for 2017 expires February 15, 2018. See Pub. 505, Tax Withholding and Extracted Tox. and Estimated Tax.

Note: If another person can claim you as a dependent on his or her tax return, you can't claim exemption from withholding if your total income exceeds \$1.050 and includes more than \$350 of unarmed income (for example, interest and dividends).

**Exceptions.** An employee may be able to claim exemption from withholding even if the employee is a dependent, if the employee:

- Is age 65 or older,

The exceptions don't apply to supplemental wages greater than \$1,000,000.

Basic instructions. If you aren't exempt, complete the Personal Allowances Worksheet below. The worksheets on page 2 further adjust your withholding allowances based on itemized deductions, certain credits, adjustments to income, or two-earners/multiple jobs situations.

Complete all worksheets that apply. However, you may claim fewer [or zero] allowances. For regular wages, withholding must be based on allowances you claimed and may not be a flat amount or percentage of wages.

Head of household. Generally, you can claim head of household filing slatus on your fax return only if you are unmarred and pay more than 50% of the costs of keeping up a home for yourself and your dependenties or other qualitying individuals. See Pub. 501, Exemptions, Standard Deduction, and Filling Information, for Information.

Tax credits. You can take projected tax credits into raccount in lighting your allowable number into account in lighting your allowable number of withholding allowances. Grodits for child or dependent care exponses and the child has credit may be claimed using the Personal Allowances Worksheet below. See Pub. 505 for information on converting your other credits into withholding allowances.

Nonwage income, if you have a large amount of norwage income, such as interest or dividends, consider making estimated tax payments usary Form 1040-ES, Estimated Tax for Individuals. Otherwise, you may owe additional tax. If you have persion or annuity income, see Pub. 505 to find out if you should adjust your withholding on Form W-4 for W-4P. Two earners or multiple jobs. If you have a working spouse or more than one job, figure the total number of allowances you are entitled to claim on all jobs using worksheets from only one Form W-4. Your withholding usually will be most accurate when all allowances are claimed on the Form W-4 for the hishest quiving ion and zero allowances. for the highest paying job and zero allowances claimed on the others. See Pub. 505 for details

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

Check your withholding. After your Form W-1 takes effect, use Pub. 505 to see how the amount you are naving withheld compares to your projected total tax tor 2017. See Pub. 505, especially if your earnings exceed \$130,000 (Single) or \$180,000 (Maniled).

Future developments. Information about any future developments affecting Form W-4 (such as legislation enacted after we release it) will be posted at www.irs.gov/iv4.

### Personal Allowances Worksheet (Keep for your records.) · You're single and have only one job; or В . You're married, have only one job, and your spouse doesn't work; or Your wages from a second job or your spouse's wages (or the total of both) are \$1,500 or less. Enter "1" for your spouse. But, you may choose to enter "-0-" if you are married and have either a working spouse or more than one job. (Entering "-0-" may help you avoid having too little tax withheld.) Enter number of **dependents** (other than your spouse or yourself) you will claim on your tax return . . . . . . . . . . D Enter "1" if you will file as head of household on your tax return (see conditions under Head of household above) . . E Enter "1" if you have at least \$2,000 of child or dependent care expenses for which you plan to claim a credit (Note: Do not include child support payments. See Pub. 503, Child and Dependent Care Expenses, for details.) Child Tax Credit (including additional child tax credit). See Pub. 972. Child Tax Credit, for more information. e If your total income will be less than \$70,000 (\$100,000 if married), enter "?" for each elicible child: then less "1" if you

Step 16 – Do you want your Oregon withholding exemption allowances to match your Federal allowances? If so you have a couple of steps more to complete the Oregon W-4. If you only want to update your Federal W-4, choose "Sign Out" and your form will be submitted to the District Office. We receive an e-mail notification that there is a form waiting to be approved.

If you want to update your Oregon W-4 choose "Do more forms".

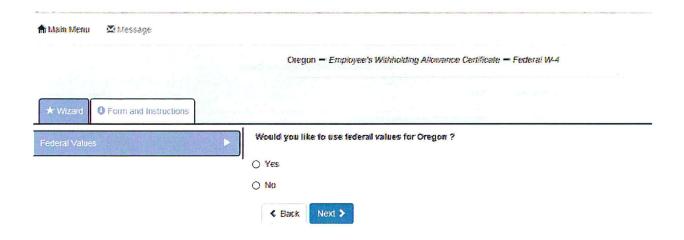
# Employee Withholding Resource Center

Locality	Name	Title	type
Federal	W-4	Employee's Withholding Allowance Certificate	resident
Oregon	Federal W-4	Employee's Withholding Allowance Certificate	resident
Federal	W-4(SP)	Certificado de Exencion de la Retencion del(la) Empleado(a)	resident
Federal	8233	Exemption From Withholding on Compensation for Independent (and Certain Dependent) Personal Services of a Nonresident Alien Individual	exempt
Federal	673	Statement For Claiming Exemption From Withholding on Foreign Earned Income Eligible for the Exclusion(s) Provided by Section 911	exempt

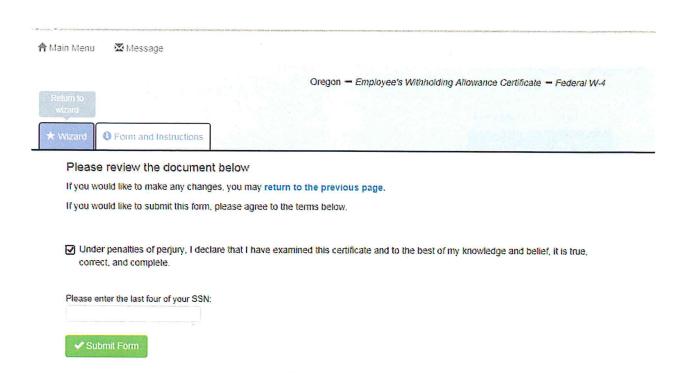
<sup>\*</sup> Suggested based on your resident and work addresses



Step 17 – Choose "Oregon" on the form choices.



Step 18 – If you want your Oregon allowances to be the same as your Federal, choose "Yes" here. If not, choose "No". Choose "Next" to go to the next page.



## For Oregon Purposes Only

# Form W-4 (2017) Purpose. Complete Form W-4 suitary our employer can withhold the correct federal income tax from your yay. Consider competing a new Form W-4 nearly your employer can withhold the correct federal income tax from your yay. Consider competing a new Form W-4 nearly your employer can withhold in the correct federal income tax from your yay. Consider competing a new Form W-4 nearly your employer can withhold the correct federal income tax from your yay. Consider competing a new Form W-4 nearly withholding allowances based on itemized deductions, certain credits making estimated tax for individuals. Otherwise, complete only incest 1. 2. 3. 4, and 7 and sign the Form W-4 or W-4P. Complete only incest 1. 2. 3. 4, and 7 and sign the Form W-4 or W-4P. Note: If another person can claim you as a dependent on his or her tax return, you can't claim exemption from withholding in flow you fold income exceeds \$1.05 and includes more than \$350 of uncarred income (for example, interest and dividends). Note: If another person can claim you as a dependent on his or her tax return, you can't claim exemption from withholding in your total income exceeds \$1.05 and includes more than \$350 of uncarred income (for example, interest and dividends). Note: In most person can claim you as a dependent on his or her tax return, you can't claim exemption from withholding in your total income exceeds \$1.05 and includes more than \$350 of uncarred income (for example, interest and dividends). Note: In most person can claim you as a dependent on his or her tax return, you can't claim exemption from withholding in your total income exceeds \$1.05 and includes more than \$350 of uncarred income (for example, interest and dividends). Note: In most person can claim your search that your form W-4 taken to income that your form withholding in the person can claim your and the proposed of the person can claim your form withholding in the person can claim your form withholding in the person can claim your form withholding in the person

Step 19 – If you chose "Yes" on the previous page you will see this page with your Oregon W-4 completed with the same number of allowances as your Federal W-4. As with the Federal form, check the box to accept the attestation statement, enter the last 4 digits of your Social Security Number and choose "Submit".

If you chose "No" on the previous page you will circle back to the filing status selection screen, Step 8. Follow the same directions as before using your Oregon tax return information as a guide.



**Message** 

Your form has been submitted!

Do more forms

Sign out

# For Oregon Purposes Only

# Form W-4 (2017)

Purpose. Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Consider completing a new Form W-4 each year and when your personal or financial situation changes.

Exemption from withholding, If you are exempt, complete only lines 1, 2, 3, 4, and 7 and sign the form to validate it. Your exemption for 2017 expires February 15, 2018. See Pub. 505, Tax Withholding and Estimated Tax.

Note: If another person can claim you as a dependent on his or her tax return, you can't claim exemption from withholding if your total income exceeds \$1,050 and includes more than \$350 of unearned income (for example, interest and dividends).

**Exceptions.** An employee may be able to claim exemption from withholding even if the employee is a dependent, if the employee:

- Is age 65 or older,
- Is blind, or
- Will claim adjustments to income; tax credits; or itemized deductions, on his or her tax return.

The exceptions don't apply to supplemental wages greater than \$1,000,000.

Basic instructions. If you aren't exempt, complete the Personal Allowances Workshoot below. The workshoot on page 2 further adjust your withholding allowances based on itemized deductions, certain credits, adjustments to income, or two-earners/multiple jobs situations.

Complete all worksheets that apply. However, you may cam fewer (or zero) allowances. For regular wages, witholding must be based on allowances you claimed and may not be a flat amount or percentage of wages.

head of household. Generally, you can claim head of household filing status on your tax return only if you are unmarried and pay more than 50% of the costs of keeping up a home for yourself and your dependently or other qualifying individuals. See Pub. 501, Exemptions, Standard Deduction, and Filing Information, for information.

Filing information, for information.

Tax credits. Voc can take projected tax credits into account in liquiding your allowable number of withholding allowances. Credits for child or dependent eare expenses and the child tax credit may be claimed using the Personal Allowances Worksheet below. See Pub. 505 for information on converting your other credits into withholding allowances.

Nonwage income. If you have a large amount of nonwage income, such as interest or thirdends, consider making estimated tax payments usars Form 1040-ES, Estimated Tax for Individuals. Otherwise, you may owe additional tax. If you have ponsion or annutry income, see Pub. Sots for find out if you should adjust your withholding on Form W-4 or W-4P.

agilest your withinoiding on Form W-4 or W-41.

Two earners or multiple jobs. If you have a working spouse or more than one job, figure the total number of allowances you are entitled to claim on all jobs using worksheets from only one Form W-4. Your withinoiding usually will be most accurate when all allowances are clamed on the Form W-4 for the highest paying job and zero allowances are claimed on the for the W-4.

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

Check your withholding. After your Form W-4 takes effect, use Pub. 505 to see how the amount you are naving withheld compares to your projected total tax tor 2017. See Pub. 505, especially if your earnings exceed \$130,000 (Single) or \$150,000 (Manied).

Future developments. Information about any future developments affecting Form W-4 (such as legislation enacted after we release it) will be posted at www.irs.gov/w4.

Hem	ized deductions, on his or ner tax return. credits into withholding allowances. at www.irs.gov/w4.	
	Personal Allowances Worksheet (Keep for your records.)	
A	Enter "1" for yourself if no one else can claim you as a dependent	
	You're single and have only one job; or	
В	Enter "1" if: { • You're married, have only one job, and your spouse doesn't work; or } B	
	<ul> <li>Your wages from a second job or your spouse's wages (or the total of both) are \$1,500 or less.</li> </ul>	
C	Enter "1" for your spouse. But, you may choose to enter "-0-" if you are married and have either a working spouse or more	
	than one job. (Entering "-0-" may help you avoid having too little tax withheld.)	
D	Enter number of dependents (other than your spouse or yourself) you will claim on your tax return	
E	Enter "1" if you will file as head of household on your tax return (see conditions under Head of household above) E	
F	Enter "1" if you have at least \$2,000 of child or dependent care expenses for which you plan to claim a credit F	
	(Note: Do not include child support payments, See Pub. 503, Child and Dependent Care Expenses, for details.)	
G	Child Tax Credit (including additional child tax credit). See Pub. 972, Child Tax Credit, for more information.	
	• If your total income will be less than \$70,000 (\$100,000 if married), enter "2" for each eligible child; then less "1" if you	
	have two to four eligible children or less "2" if you have five or more eligible children.	
	• If your total income will be between \$70,000 and \$84,000 (\$100,000 and \$119,000 if married), enter "1" for each eligible child. G	
H	Add lines A through G and enter total here. (Note: This may be different from the number of exemptions you claim on your tax return.) > H	

Step 20 – Your form(s) have now been submitted to the District Office to be updated in the payroll system. Choose **"Sign Out"** to leave this area.

**IMPORTANT:** W-4 forms can be submitted at any time. However forms submitted less than 5 days prior to that month's pay day may not be included in that month's paycheck processing, so please submit early. You can always check back to see if your W-4 information has been updated by following Steps 1 through 4 and looking at the bottom of the screen for your current W-4 information (pictured on page 5). If you don't see your updated choice under the "Current Elections" section, please call the District Office (541) 995-6626 x364 to check on the status of your form.