

NYIT Self-Service Application Changing your State Tax Information

Employees may adjust their state income tax withholdings through the Self Service Application. Withholding status and allowance(s), including any additional amount withheld, will apply to all active employee assignments. Changes made through this application will change the employee's official NYIT Personnel Record.

NYIT Self Service Applications → Tax Info → State Information

1. From the Self Service menu choose 'Tax Info'



The screenshot shows the Oracle Applications Home Page. The user is logged in as DCOUNSEL. The main content area is titled 'NYIT Employee Self-Service' and contains a list of links: Personal Information, Payslip, Tax Info, Benefits, My Information, United Health Care Log in, MetLife Dental Care Log in, Self Service Help FAQs, and NYIT Human Resource Office. A red arrow points to the 'Tax Info' link. There is also a 'Personalize' button next to the list.






2. The **Tax Form** page will load with the employee's federal tax withholding selections visible and a link to the state form.



The screenshot shows the 'Tax Form' page. The employee's name is 'Local 282, Harris'. The page displays federal tax withholding information for the 'Federal W-4 Form'. The filing status is 'Married', allowances are '0', additional amount withheld is '0', and FIT Exempt is 'No'. There is an 'Update' button. Below the federal information, there is a section for 'State Information' with a link to 'New York Withholding Form(PDF)' circled in red.

3. Click on the hyperlink [New York Withholding Form\(PDF\)](#) - you will be brought to a PDF form on the www.tax.ny.gov website. This PDF form includes the 'Allowance Certificate' or IT-2104 Form, Instructions on how to complete the form, a Worksheet and a chart for taxpayers. The allowance form can be filled out online but **you must still print it out and take it Payroll for processing.**

4. Below is an example of each page of the form. You will be allowed to type information in the blank fields below.

  	<p style="font-size: small; margin: 0;">Please fill out the following form. You cannot save data typed into this form. Please print your completed form if you would like a copy for your records.</p>	 Highlight Existing Field										
 <p style="margin: 0;">New York State Department of Taxation and Finance</p> <h2 style="margin: 0;">Employee's Withholding Allowance Certificate</h2> <p style="margin: 0;">New York State • New York City • Yonkers</p>		<div style="border: 1px solid black; padding: 5px; display: inline-block;"> <h1 style="margin: 0;">IT-2104</h1> <small>(6/11)</small> </div>										
Print or type	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 40%; padding: 2px;">First name and middle initial Jack BeNimble</td> <td style="width: 40%; padding: 2px;">Last name BeQuick</td> <td style="width: 20%; padding: 2px;">Your social security number</td> </tr> <tr> <td colspan="2" style="padding: 2px;">Permanent home address (number and street or rural route)</td> <td style="padding: 2px;">Apartment number</td> </tr> <tr> <td style="padding: 2px;">City, village, or post office</td> <td style="padding: 2px;">State</td> <td style="padding: 2px;">ZIP code</td> </tr> </table>	First name and middle initial Jack BeNimble	Last name BeQuick	Your social security number	Permanent home address (number and street or rural route)		Apartment number	City, village, or post office	State	ZIP code	<p>Single or Head of household <input type="checkbox"/> Married <input type="checkbox"/></p> <p>Married, but withhold at higher single rate <input type="checkbox"/></p> <p style="font-size: x-small;">Note: If married but legally separated, mark an X in the Single or Head of household box.</p>	
First name and middle initial Jack BeNimble	Last name BeQuick	Your social security number										
Permanent home address (number and street or rural route)		Apartment number										
City, village, or post office	State	ZIP code										
<p>Are you a resident of New York City? Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>Are you a resident of Yonkers? Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>Complete the worksheet on page 3 before making any entries.</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 80%; padding: 2px;">1 Total number of allowances you are claiming for New York State and Yonkers, if applicable (from line 20)</td> <td style="width: 20%; border: 1px solid black; text-align: center;">1.</td> </tr> <tr> <td style="padding: 2px;">2 Total number of allowances for New York City (from line 31)</td> <td style="border: 1px solid black; text-align: center;">2.</td> </tr> </table> <p>Use lines 3, 4, and 5 below to have additional withholding per pay period under special agreement with your employer.</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 80%; padding: 2px;">3 New York State amount</td> <td style="width: 20%; border: 1px solid black; text-align: center;">3.</td> </tr> <tr> <td style="padding: 2px;">4 New York City amount</td> <td style="border: 1px solid black; text-align: center;">4.</td> </tr> <tr> <td style="padding: 2px;">5 Yonkers amount</td> <td style="border: 1px solid black; text-align: center;">5.</td> </tr> </table>			1 Total number of allowances you are claiming for New York State and Yonkers, if applicable (from line 20)	1.	2 Total number of allowances for New York City (from line 31)	2.	3 New York State amount	3.	4 New York City amount	4.	5 Yonkers amount	5.
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<p>I certify that I am entitled to the number of withholding allowances claimed on this certificate.</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 70%; border: 1px solid black; padding: 2px;">Employee's signature</td> <td style="width: 30%; border: 1px solid black; padding: 2px;">Date</td> </tr> </table>			Employee's signature	Date								
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<p>Penalty — A penalty of \$500 may be imposed for any false statement you make that decreases the amount of money you have withheld from your wages. You may also be subject to criminal penalties.</p> <p>Employee: detach this page and give it to your employer; keep pages 3 and 4 for your records.</p> <hr/> <p>Employers only: Mark an X in box A and/or box B to indicate why you are sending a copy of this form to New York State (see instr.):</p> <p>A. Employee claimed more than 14 exemption allowances for NYS A. <input type="checkbox"/></p> <p>B. Employee is a new hire or a rehire.... B. <input type="checkbox"/> First date employee performed services for pay (mm-dd-yyyy) (see instr.): <input style="width: 100px;" type="text"/></p> <p style="padding-left: 40px;">Are dependent health insurance benefits available for this employee? Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p style="padding-left: 40px;">If Yes, enter the date the employee qualifies (mm-dd-yyyy): <input style="width: 100px;" type="text"/></p>												
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Part of the first, and the entire second page, of the **IT-2104** provides instructions and assistance with completing the form.

Instructions

Changes effective for 2011

Beginning with tax year 2011, the Yonkers resident personal income tax surcharge rate has increased. Employers have been notified of new withholding tables to ensure that the proper amount of tax is withheld for 2011 without any further action on your part. However, if you completed Form IT-2104 and requested an additional dollar amount of Yonkers withholding on line 5, you should complete this revised 2011 Form IT-2104 and give it to your employer.

If you completed a 2010 Form IT-2104 and computed an additional New York City withholding amount, you should complete a new 2011 Form IT-2104 and give it to your employer.

When reporting new hires or rehires, employers are now required to report the first date an employee performed services for pay. They must also report if dependent health insurance benefits are available and the date the employee becomes eligible for the benefit.

Who should file this form

This certificate, Form IT-2104, is completed by an employee and given to the employer to instruct the employer how much New York State (and New York City and Yonkers) tax to withhold from the employee's pay. The more allowances claimed, the lower the amount of tax withheld.

If you do not file Form IT-2104, your employer may use the same number of allowances you claimed on federal Form W-4. Due to differences in tax law, this may result in the wrong amount of tax withheld for New York State, New York City, and Yonkers. Complete Form IT-2104 each year

and file it with your employer if the number of allowances you may claim is different from federal Form W-4 or has changed. Common reasons for completing a new Form IT-2104 each year include the following:

- You started a new job.
- You are no longer a dependent.
- Your individual circumstances may have changed (for example, you were married or have an additional child).
- You itemize your deductions on your personal income tax return.
- You claim allowances for New York State credits.
- You owed tax or received a large refund when you filed your personal income tax return for the past year.
- Your wages have increased and you expect to earn \$100,000 or more during the tax year.
- The total income of you and your spouse has increased to \$100,000 or more for the tax year.
- You have significantly more or less income from other sources or from another job.
- You no longer qualify for exemption from withholding.
- You have been advised by the Internal Revenue Service that you are entitled to fewer allowances than claimed on your original federal Form W-4, and the disallowed allowances were claimed on your original Form IT-2104.

Exemption from withholding

You cannot use Form IT-2104 to claim exemption from withholding. To claim exemption from income tax withholding, you **must** file Form IT-2104-E, *Certificate of Exemption from Withholding*, with your employer. You must file a new certificate each year that you qualify for exemption. This exemption from withholding is allowable only if you had no New York income tax liability in the prior year, you expect none in the current year, **and** you are over 65 years of age, under 18, or a full-time student under 25. You may also claim exemption from withholding if you are a military spouse and meet the conditions set forth under the Servicemembers Civil Relief Act as amended by the Military Spouses Residency Relief Act. If you are a dependent who is under 18 or a full-time student, you may owe tax if your income is more than \$3,000.

Withholding allowances

You may **not** claim a withholding allowance for yourself or, if married, your spouse. Claim the number of withholding allowances you compute in Part 1 and Part 3 on page 3 of this form. If you want more tax withheld, you may claim fewer allowances. **If you claim more than 14 allowances**, your employer **must** send a copy of your **Form IT-2104** to the New York State Tax Department. You may then be asked to verify your allowances. If you arrive at negative allowances (less than zero) on lines 1, 2, 20, or 31, and your employer cannot accommodate negative allowances, **enter 0** and see *Additional dollar amount(s)* below.

Income from sources other than wages — If you have more than \$1,000 of income from sources other than wages (such as interest, dividends, or alimony received), reduce the number of allowances claimed on line 1 and line 2 (if applicable) of the IT-2104 certificate by one for each \$1,000 of nonwage income. If you arrive at negative allowances (less than zero), see *Withholding allowances* above. You

job employer. If you arrive at negative allowances (less than zero), see *Withholding allowances* above.

If your combined wages are between \$100,000 and \$1,100,000, use one of the charts in Part 4 to compute the number of allowances to transfer to line 19. Substitute the words *Highest paying job* for *Higher earner's wages* within the charts.

Dependents — If you are a dependent of another taxpayer and expect your income to exceed \$3,000, you should reduce your withholding allowances by one for each \$1,000 of income over \$2,500. This will ensure that your employer withholds enough tax.

Following the above instructions will help to ensure that you will not owe additional tax when you file your return.

Heads of households with only one job — If you will use the head-of-household filing status on your state income tax return, mark the *Single or Head of household* box on the front of the certificate. If you have only one job, you may also wish to claim two additional withholding allowances on line 14.

Married couples with only one spouse working — If your spouse does not work and has no income subject to state income tax, mark the *Married* box on the front of the certificate. You may also wish to claim two additional allowances on line 15.

Additional dollar amount(s)

You may ask your employer to withhold an additional dollar amount each pay period by completing lines 3, 4, and 5 on Form IT-2104. In most instances, if you compute a negative number of allowances using the worksheet on page 3 and your employer cannot accommodate a negative number, for each negative allowance claimed you should have an

