

W-4 TAX WITHHOLDING GUIDE

U.S. Employees

The W -4 form collects information to determine the amount of federal taxes to withhold from your pay. Most states have a similar form as well. The number of withholding allowances you claim and your filing status determine your taxes.

Applies to

This policy applies to all employees except:

- Expatriates
- Independent contractors
- International employees
- International students

Obtaining the form

As an employee of UnitedHealth Group, you are not required to submit an actual paper document of the W -4 form. You must use the Self Service (<https://globalselfservice.uhg.com/>) application to submit tax status changes. However, the W -4 form has a worksheet that can help you determine how many withholding allowances (see Terms below) to claim given your individual situation.

Submitting the form

You may change your withholding elections at any time. The changes are not retroactive. You must update your W-4 by accessing Self Service (<https://globalselfservice.uhg.com/>). In Self Service under Payroll and Compensation, click on W-4 Tax Information.

When changes take effect

Changes to your current information or new information must be submitted online prior to 6:00pm CT on Monday of pay week for the change to take effect. Please note that due to the nature of processing payroll there may be times when changes made to your online W-4 on Tuesday of pay week will also affect that week's paycheck, but are not guaranteed. If a form must be faxed, it must be submitted seven business days ahead of payday for the change to take effect.

Tax options

You can't have a fixed amount or a certain percentage of your pay deducted from each paycheck. After your pay is taxed, if you want additional federal taxes withheld, you must access Self Service (<https://globalselfservice.uhg.com/>) and enter an additional amount under the W -4 Tax Data section of the W-4 Tax Information form

Exempt status

If you wish to have no Federal taxes taken from your paycheck, you may elect to do so. However, you must meet both of the following conditions:

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

To claim Exempt (see Terms below), click the "Exempt" box in the Claim Exemption section of the W -4 Tax Information form.

You must claim this exemption by February 15 of the following year. If you do not re-elect or make another new election by February 15, the company is required to change your withholding election to single with zero allowances.

Electing exempt status (see Terms below) from federal income tax does not exempt Social Security and

Medicare taxes, and does not generally imply exemption from state or local taxes, which are elected separately. As requested by the IRS, UnitedHealth Group may send employee information to the IRS for those that elect exempt status, or claim more than ten (10) allowances.

If you are currently claiming "exempt" from federal taxes, it is a multi-step process to remove the exemption.

- Go into Self Service (<https://globalselfservice.uhg.com/>) and click off the exempt button under the blue bar that says "Claim Exemption."
- Click on the submit button and then click on the OK button.
- Then you can go back in and make the additional changes you want.

State tax withholding forms

As an employee of UnitedHealth Group, you are not required to submit an actual paper document to Corporate Payroll Services. If you would like to claim different allowances for state than what you claim for federal, you must complete the State Tax Data section of the W-4 Tax Information form.

The only situation where you must complete the state form and submit it to Corporate Payroll Tax is if you work in Georgia and you want additional allowances in excess of the maximum number of allowances allowed by marital status.

You can fax the completed state form to Corporate Payroll Tax at 855-258-3859 or scan the form and email it to Corporate_Payroll_Tax@uhc.com.

Paystub

On your paystub in the 'TAX DATA' section you will see the following information for federal, resident state and work state:

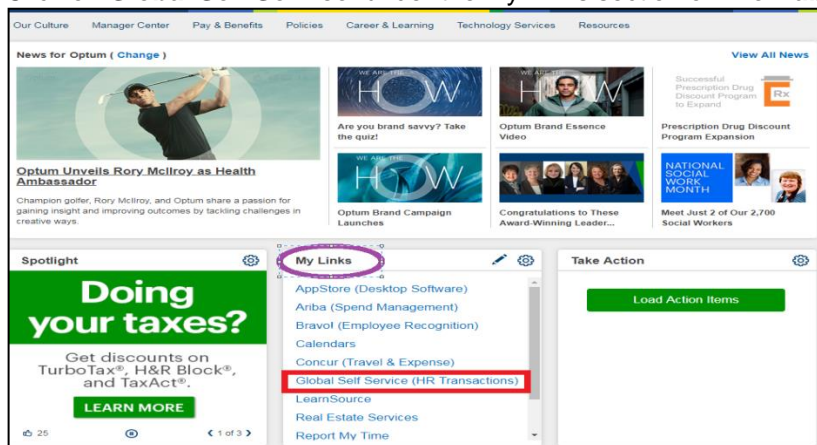
- The state
- Allowances
- Additional withholding amounts
- If Arizona, the percentage of taxable wages elected

To change/ update your W-4 Tax Withholding

Before You Begin – W-4 Tax Withholding Guide

The number of withholding allowances you claim and your filing status determine tax deductions on your paycheck. Consult the [W-4 Tax Withholding guide](#) to understand your requirements and policy.

1. Click on **Global Self Service**—under the My Links section of **The Hub**- UnitedHealth Groups Intranet.



2. Log-in to **Global Self-Service** using your MS ID and MS Password if logging in with the **Intranet** link. Otherwise, use your Employee ID.

UNITEDHEALTH GROUP®

**Enterprise Secure Sign On
Global Self Service**

Sign In

MS ID (example: asmith1)

Password

Sign In

Need help signing in?

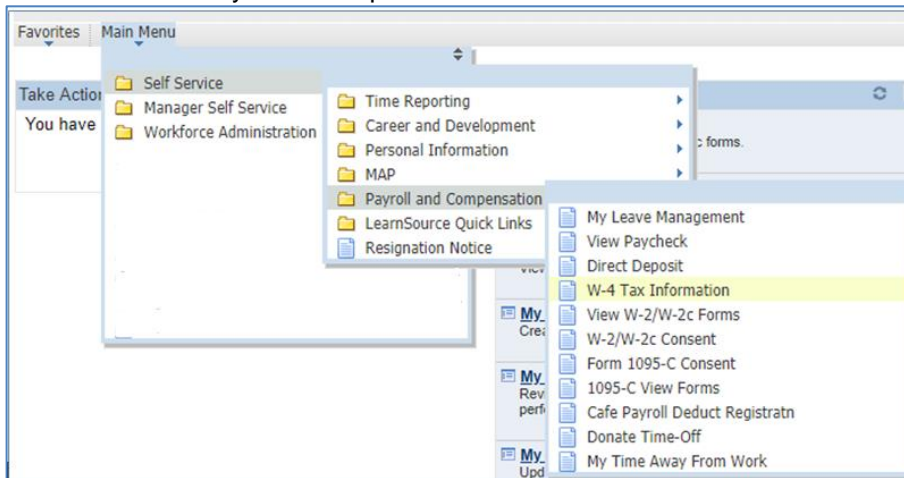
Call the IT Help Desk at:
[1-888-848-3375](tel:1-888-848-3375) (North & South America)

View all [IT Help Desk Phone Numbers](#)

Enterprise Secure Sign On gives UnitedHealth Group employees and contractors access to applications via entry of an MS ID and password.

Do not share your MS ID or password!

3. Self-Service → Payroll & Compensation → W-4 Tax Information



4. Review and complete all necessary fields and then click the **Submit** button

UNITEDHEALTH GROUP

Favorites Main Menu > Self Service > Payroll and Compensation > W-4 Tax Information

W-4 Tax Information

You must complete Form W-4 so the Payroll Department can calculate the correct amount of tax to withhold from your pay. Federal income tax is withheld from your wages based on marital status and the number of allowances claimed on this form. You may also specify that an additional dollar amount be withheld. You can file a new Form W-4 anytime your tax situation changes and you choose to have more, or less, tax withheld.

Whether you are entitled to claim a certain number of allowances or exemption from withholding is subject to review by the IRS. Your employer may be required to send a copy of this form to the IRS.

Review the [Tax Forms page](#) on The Hub to learn more. If you need additional assistance, please contact HRdirect by submitting an [online request](#).

Keys to Success

1. Review your paycheck to see your current withholding authorization (a).
2. Review your paycheck to see withholding made based on your current settings (b).

Tax Data	
Fed Marital Status:	Married ^a
Fed Allowances:	0
Fed Addl Amount:	\$0.00
TX Marital Status:	Married ^a
TX Allowances:	0
TX Addl Amount:	\$0.00

Taxes		
Description	Amount	YTD Amount
Fed Withholding		0.00
Fed MED/EE	3.01	3.01
Fed OASDI/EE	12.85	12.85
Total:	15.86	15.86

3. Use the IRS worksheet for guidance:
 - Use the worksheet on the IRS [W-4 Form \(print\)](#) to determine how many withholding allowances to claim given your individual situation.
4. Use government resources for answers to tax questions:
 - Check government resources ([IRS website](#) and [state government websites](#)) for answers to tax questions. (HRdirect cannot provide answers.)

Terms

Exempt status – A filing status you can claim on your W-4 form if you meet certain requirements. Federal taxes are not deducted from your pay.

Filing status – Your marital status -- such as single, married, married but withhold at higher single rate -- which you claim in box 3 on the W-4.

Withholding allowance (personal exemption, personal allowance) – A deduction you claim on your W-4 that reduces your tax withholding throughout the year.