

## INSTRUCTIONS FOR MISSOURI W-4

Read the Notice "Important Changes Regarding 2019 Employer's Withholding Taxes", then click the link for the withholding calculator (this will help you determine the correct Filing Status for your tax circumstance) or "I have read this information" (clicking this will allow you to get to the form and you can electronically complete it, then print and sign and date).

Line 1 - Select a Status.

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1. Filing Status: Check the appropriate filing status below.

- ☐ Single or Married Spouse Works or Married Filing Separate      ☐ Married (Spouse does not work)  
☐ Head of Household

Underline, or circle, which one you're selecting "Single" or "Married Spouse Works" or "Married Filing Separately"

☒ Single or Married Spouse Works or Married Filing Separate

Line 2 - Put in a dollar amount. Zero or whatever dollar amount additional you want withheld for State taxes for EACH pay check. NO half dollars (i.e. \$2.50), **must be whole dollars** (i.e. \$2.00 or \$3.00).

Line 3 - Put a Zero. I have no way to reduce your withholding.

Line 4 - Enter a dash or write N/A. The majority of people are not exempt. Receiving "a" refund from the state does not automatically qualify you as exempt. You are exempt ONLY if you receive every penny back that was withheld (box 17 on your W-2).

Sign the form and date it (date = day you completed and signed, not your birthdate).

Do not leave anything blank. I hope this helps clarify the completion of this form.



MISSOURI DEPARTMENT OF

**REVENUE****Employee's Withholding Certificate**

This certificate is for income tax withholding and child support enforcement purposes only. Type or print.

<b>Employee</b>	Full Name		Social Security Number	
	Home Address (Number and Street or Rural Route)		City or Town	State ZIP Code
	<b>1. Filing Status:</b> Check the appropriate filing status below. <input type="checkbox"/> Single or Married Spouse Works or Married Filing Separate <input type="checkbox"/> Married (Spouse does not work) <input type="checkbox"/> Head of Household			
	<b>2. Additional withholding:</b> If you expect to have a balance due (as a result of interest income, dividends, income from a part-time job, etc.) on your tax return, you may request your employer to withhold an additional amount of tax from each pay period. To calculate the amount needed, divide the amount of the expected tax by the number of pay periods in a year. Enter the additional amount to be withheld each pay period on line 2..... 2			
<b>Signature</b>	<b>3. Reduced withholding:</b> If you expect to receive a refund (as a result of itemized deductions, modifications or tax credits) on your tax return, you may direct your employer to only withhold the amount indicated on line 3. Your employer will not use the standard calculations for withholding. If you designate an amount that is too low, it could result in you being under withheld. To calculate the amount needed, divide the amount of your expected tax by the number of pay periods in a year. Enter the amount to be withheld instead of the standard calculation. If no amount is indicated on line 3, the standard calculations will be used.. 3			
	<b>4. Exempt Status:</b> Select the appropriate reason you are claiming an exemption from withholding below and indicate EXEMPT on line 4. .... 4			
	<input type="checkbox"/> I am exempt because I had a right to a refund of all Missouri income tax withheld last year and expect to have no tax liability this year. A new MO W-4 must be completed annually if you wish to continue the exemption.			
	<input type="checkbox"/> I am exempt because I meet the conditions set forth under the Servicemember Civil Relief Act, as amended by the Military Spouses Residency Relief Act and have no Missouri tax liability.			
<b>Employer</b>	<input type="checkbox"/> I am exempt because my income is earned as a member of any active duty component of the Armed Forces of the United States and I am eligible for the military income deduction.			
	Under penalties of perjury, I certify that the information provided on this form is true and accurate.			
	Employee's Signature (Form is not valid unless you sign it)		Date (MM/DD/YYYY) ____/____/____	
	Employer's Name		Employer's Address	
<b>Signature</b>	City		State	ZIP Code
	Date Services for Pay First Performed by Employee (MM/DD/YYYY) ____/____/____		Federal Employer I.D. Number	Missouri Tax Identification Number

**Notice To Employer:**

Within 20 days of hiring a new employee, send a copy of Form MO W-4 to the Missouri Department of Revenue, P.O. Box 3340, Jefferson City, MO 65105-3340 or fax to (573) 526-8079.

Please visit <http://dss.mo.gov/child-support/employers/new-hire-reporting.htm> for additional information regarding new hire reporting.

**Notice to Employee:**

Return completed form to your Employer. Consider completing a new Form MO W-4 each year and when your personal or financial situation changes. Visit our online withholding calculator <https://mytax.mo.gov/rptportal/home/withholding-calculator>.

**Items to Remember:**

- Employees must complete a new form if their filing status changes or to adjust the amount of withholding.
- If you are claiming an "Exempt" status due to the Military Spouses Residency Relief Act you must provide one of the following to your employer: Leave and Earnings Statement of the non-resident military servicemember, Form W-2 issued to the nonresident military servicemember, a military identification card, or specific military orders received by the servicemember. You must also provide verification of residency such as a copy of your state income tax return filed in your state of residence, a property tax receipt from the state of residence, a current drivers license, vehicle registration or voter ID card. For additional assistance in regard to Military, visit the department's website <https://dor.mo.gov/military/>.
- Additional information can be found at <https://dor.mo.gov/business/withhold/>.

**Mail to:** Taxation Division  
P.O. Box 3340  
Jefferson City, MO 65105-3340

**Phone:** (573) 522-0967  
**Fax:** (573) 526-8079

Form MO W-4 (Revised 12-2019)

## **Why redesign Form W-4?**

The new design reduces the form's complexity and increases the transparency and accuracy of the withholding system. While it uses the same underlying information as the old design, it replaces complicated worksheets with more straightforward questions that make accurate withholding easier for employees.

## **What happened to withholding allowances?**

Allowances are no longer used for the redesigned Form W-4 to increase transparency, simplicity, and accuracy. In the past, the value of a withholding allowance was tied to the amount of the personal exemption. Due to changes in law, currently you cannot claim personal exemptions or dependency exemptions.

## **My tax situation is simple. Are some questions optional?**

Yes. The form is divided into 5 steps. The only two steps required for all employees are Step 1, where you enter personal information like your name and filing status, and Step 5, where you sign the form. If Steps 2 – 4 apply to you, your withholding will more accurately match your tax liability if you complete them.

## **What happens if I only fill out step 1 and then sign the form?**

Your withholding will be computed based on your filing status's standard deduction and tax rates, with no other adjustments.

## **When should I increase my withholding?**

You should increase your withholding if:

- you hold more than one job at a time or you and your spouse both have jobs (Step 2) or
- you have income from sources other than jobs that is not subject to withholding (line 4a).

If you do not make these adjustments, you will likely owe additional tax when filing your tax return, and you may owe interest and penalties. With regard to income from other sources, you can pay estimated tax instead of having extra withholding.

## **When should I decrease my withholding?**

If you are eligible for income tax credits such as the child tax credit or credit for other dependents, and/or you are eligible for deductions (other than the standard deduction), you can follow the instructions described in lines 3 and 4b to decrease your withholdings by the appropriate amount.

## **I want a refund when I file my tax return. How should I complete the redesigned Form W-4?**

The redesigned Form W-4 makes it easier for you to have your withholding match your tax liability. But some employees may prefer to have more of their money withheld from their paychecks throughout the year and then get that money back as a refund when they file their tax returns. The simplest way to increase your withholding is to enter on line 4c the additional amount you would like your employer to withhold from each paycheck after your Form W-4 takes effect. You also can check the box in Step 2(c) to have an additional amount withheld for reasons other than multiple jobs. Whether you will be due a refund (and, if so, the amount of your refund) when you file your tax return depends on the details of your entire tax situation.

## **Why do I need to account for multiple jobs (Step 2)? I have never done that before.**

Tax rates increase as income rises, and only one standard deduction can be claimed on each tax return, regardless of the number of jobs in the household. Therefore, if you have more than one job at a time or are married filing jointly and both you and your spouse work, more money should usually be withheld from the combined pay for all the jobs than would be withheld if each job was considered by itself. Adjustments to your withholding usually should be made to avoid owing additional tax, and potentially penalties and interest, when you file your tax return. All of this has been true for many years; it did not change with the recent tax law changes. The old Form W-4 accounted for multiple jobs using detailed instructions and worksheets that many employees may have overlooked. Step 2 of the redesigned Form W-4 lists three different options you may choose from to make the necessary withholding adjustments.

## **Which option in Step 2 should I use to account for my multiple jobs? Which is most accurate? What if I don't want to reveal to my employer on my W-4 that I have a second job?**

Step 2 allows you to choose **one** of three options, which involve tradeoffs between accuracy, privacy, and ease of use:

- **Option 1:** For maximum accuracy and privacy (to avoid revealing to your employer on your W-4 that you have multiple jobs) use the Tax Withholding Estimator at [www.irs.gov/W4app](http://www.irs.gov/W4app). You will be guided to enter an additional amount to withhold on line 4c. You will need to know the approximate amount of pay for each job, but you will need to enter the additional amount on the Form W-4 for only one of the jobs. If pay for any of the jobs changes significantly, you will need to furnish a new Form W-4 to have accurate withholding.
- **Option 2:** If you do not have access to the online Tax Withholding Estimator but wish to have roughly accurate withholding while retaining privacy, you may use Worksheet 1 on page 3 and similarly be guided to enter an additional amount to withhold on line 4c. You will need to know the approximate amount of pay for each job, but you will need to enter the additional amount on the Form W-4 for only one of the jobs. If pay for any of the jobs changes the additional withholding amount in the lookup table, you will need to furnish a new Form W-4 to have accurate withholding.
- **Option 3:** If there are only two jobs held at the same time in your household, you may check the box in Step 2 on the forms for both jobs. The standard deduction and tax brackets will be divided equally between the two jobs. You would not need to furnish a new Form W-4 to account for pay changes at either job. This option is less accurate—more tax than necessary may be withheld from your wages—but you generally won't have too little tax withheld. (The more similar the earnings at the two jobs, the more accurate this option will be. To get an idea of how much overwithholding you can expect in your case, see the tables that will be provided in the 2020 Pub. 505.) This option reveals to your employer on your W-4 that you have multiple jobs in your household. But it also is the easiest option to use: just check the box.

## **The instructions above Step 3 say that in multiple job households, adjustments in lines 3 through 4b are to be made on only one form, and that withholding will be most accurate if the adjustments are made on the W-4 for the highest paying job. But what happens if pay at two jobs is relatively similar or if the job that pays more changes over time?**

In general, making these adjustments on the Form W-4 for the highest paying job increases accuracy. However, if the jobs in your household pay about the same or if the job that pays more changes over time, it is less important which Form W-4 is used to make the adjustment.

## **What if I have a side gig where I'm not treated as an employee?**

If you have self-employment income, you will generally owe both income tax and self-employment tax. Form W-4 is primarily intended to be used by employees who are not subject to self-employment tax. Thus, like the old Form W-4, the redesigned Form W-4 does not compute self-employment tax. If you would like to use Form W-4 to make an adjustment to your withholding to account for self-employment income that you will receive from another source, use the Tax Withholding Estimator at [www.irs.gov/W4app](http://www.irs.gov/W4app) or refer to IRS Publication 505.

## **What if I don't want to reveal my non-job income, such as income from earnings on investments or retirement income, to my employer (line 4a)?**

You are not required to have tax on non-wage income withheld from your paycheck. Instead, you can pay estimated tax on this income using Form 1040-ES, Estimated Tax for Individuals. However, if you want to use Form W-4 to have tax for this income withheld from your paycheck, you have two options. You can report the income on line 4a. If you don't want to report this income directly on line 4a, you can use the Tax Withholding Estimator at [www.irs.gov/W4app](http://www.irs.gov/W4app). The estimator will help you calculate the additional amount of tax that should be withheld from your paycheck. You will then enter that amount on line 4c, without reporting the income to your employer. You also can check the box in Step 2(c) to have an additional amount withheld for reasons other than multiple jobs. If you expect to have dividend or capital gain income, your withholding will be more accurate if you have the estimator compute the withholding adjustment rather than reporting this income on line 4a.

## **I have a more complex tax situation. Is there a computer program I can use to help me complete Form W-4?**

Yes. To provide maximum accuracy, you are encouraged to use the Tax Withholding Estimator available at [www.irs.gov/W4app](http://www.irs.gov/W4app). Updates and improvements to the estimator are underway that will be compatible with the redesigned Form W-4 in 2020. You may wish to use the withholding estimator if you:

- expect to work only part of the year,
- have dividend or capital gain income or are subject to additional taxes, such as the net investment income tax,
- have self-employment income,
- prefer the most accurate withholding for multiple job situations, or
- prefer to limit information provided in Steps 2–4 but do not want to sacrifice accuracy.

**Employee's Withholding Certificate****2020**

- ▶ **Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay.**  
 ▶ **Give Form W-4 to your employer.**  
 ▶ **Your withholding is subject to review by the IRS.**

**Step 1:  
Enter  
Personal  
Information**

(a) First name and middle initial	Last name	(b) Social security number
Address		▶ <b>Does your name match the name on your social security card?</b> If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to <a href="http://www.ssa.gov">www.ssa.gov</a> .
City or town, state, and ZIP code		
(c) <input type="checkbox"/> <b>Single or Married filing separately</b> <input type="checkbox"/> <b>Married filing jointly</b> (or Qualifying widow(er)) <input type="checkbox"/> <b>Head of household</b> (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 online estimator, 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](http://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 2020 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 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**

(a) **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)** \$ \_\_\_\_\_

(b) **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)** \$ \_\_\_\_\_

(c) **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)
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## General Instructions

### 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](http://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.

**Exemption from withholding.** You may claim exemption from withholding for 2020 if you meet both of the following conditions: you had no federal income tax liability in 2019 **and** you expect to have no federal income tax liability in 2020. You had no federal income tax liability in 2019 if (1) your total tax on line 16 on your 2019 Form 1040 or 1040-SR is zero (or less than the sum of lines 18a, 18b, and 18c), 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 2020 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 1a, 1b, and 5. Do not complete any other steps. You will need to submit a new Form W-4 by February 16, 2021.

**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 4(a), you may enter an additional amount you want withheld per pay period in Step 4(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/W4App](http://www.irs.gov/W4App) 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 the 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/W4App](http://www.irs.gov/W4App) 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 **(c)**. 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.** Step 3 of Form W-4 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 can't be claimed, such as an older child or a qualifying relative. For additional eligibility requirements for these credits, see Pub. 972, Child Tax Credit and Credit for Other Dependents. You can also include **other tax credits** in this step, such as education tax credits and the foreign tax credit. 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 2020 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](http://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 . . . . . **1** \$ \_\_\_\_\_
- 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 . . . . . **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 . . . . . **2b** \$ \_\_\_\_\_
  - c** Add the amounts from lines 2a and 2b and enter the result on line 2c . . . . . **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. . . . . **3** \_\_\_\_\_
- 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) . . . . . **4** \$ \_\_\_\_\_

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

- 1** Enter an estimate of your 2020 itemized deductions (from Schedule A (Form 1040 or 1040-SR)). Such deductions may include qualifying home mortgage interest, charitable contributions, state and local taxes (up to \$10,000), and medical expenses in excess of 10% of your income . . . . . **1** \$ \_\_\_\_\_
- 2** Enter:  $\left\{ \begin{array}{l} \bullet \$24,800 \text{ if you're married filing jointly or qualifying widow(er)} \\ \bullet \$18,650 \text{ if you're head of household} \\ \bullet \$12,400 \text{ if you're single or married filing separately} \end{array} \right\}$  . . . . . **2** \$ \_\_\_\_\_
- 3** If line 1 is greater than line 2, subtract line 2 from line 1. If line 2 is greater than line 1, enter "-0-" . . . **3** \$ \_\_\_\_\_
- 4** Enter an estimate of your student loan interest, deductible IRA contributions, and certain other adjustments (from Schedule 1 (Form 1040 or 1040-SR)). See Pub. 505 for more information . . . **4** \$ \_\_\_\_\_
- 5 Add** lines 3 and 4. Enter the result here and in **Step 4(b)** of Form W-4 . . . . . **5** \$ \_\_\_\_\_

**Privacy Act and Paperwork Reduction Act Notice.** We ask for the information on this form to carry out the Internal Revenue laws of the United States. Internal Revenue Code sections 3402(f)(2) and 6109 and their regulations require you to provide this information; your employer uses it to determine your federal income tax withholding. Failure to provide a properly completed form will result in your being treated as a single person with no other entries on the form; providing fraudulent information may subject you to penalties. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation; to cities, states, the District of Columbia, and U.S. commonwealths and possessions for use in administering their tax laws; and to the Department of Health and Human Services for use in the National Directory of New Hires. We may also disclose this information to other countries under a tax treaty, to federal and state agencies to enforce federal nontax criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism.

You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. Generally, tax returns and return information are confidential, as required by Code section 6103.

The average time and expenses required to complete and file this form will vary depending on individual circumstances. For estimated averages, see the instructions for your income tax return.

If you have suggestions for making this form simpler, we would be happy to hear from you. See the instructions for your income tax return.



**Married Filing Jointly or Qualifying Widow(er)**

Higher Paying Job Annual Taxable Wage & Salary	Lower Paying Job Annual Taxable Wage & Salary											
	\$0 - 9,999	\$10,000 - 19,999	\$20,000 - 29,999	\$30,000 - 39,999	\$40,000 - 49,999	\$50,000 - 59,999	\$60,000 - 69,999	\$70,000 - 79,999	\$80,000 - 89,999	\$90,000 - 99,999	\$100,000 - 109,999	\$110,000 - 120,000
\$0 - 9,999	\$0	\$220	\$850	\$900	\$1,020	\$1,020	\$1,020	\$1,020	\$1,020	\$1,210	\$1,870	\$1,870
\$10,000 - 19,999	220	1,220	1,900	2,100	2,220	2,220	2,220	2,220	2,410	3,410	4,070	4,070
\$20,000 - 29,999	850	1,900	2,730	2,930	3,050	3,050	3,050	3,240	4,240	5,240	5,900	5,900
\$30,000 - 39,999	900	2,100	2,930	3,130	3,250	3,250	3,440	4,440	5,440	6,440	7,100	7,100
\$40,000 - 49,999	1,020	2,220	3,050	3,250	3,370	3,570	4,570	5,570	6,570	7,570	8,220	8,220
\$50,000 - 59,999	1,020	2,220	3,050	3,250	3,570	4,570	5,570	6,570	7,570	8,570	9,220	9,220
\$60,000 - 69,999	1,020	2,220	3,050	3,440	4,570	5,570	6,570	7,570	8,570	9,570	10,220	10,220
\$70,000 - 79,999	1,020	2,220	3,240	4,440	5,570	6,570	7,570	8,570	9,570	10,570	11,220	11,240
\$80,000 - 99,999	1,060	3,260	5,090	6,290	7,420	8,420	9,420	10,420	11,420	12,420	13,260	13,460
\$100,000 - 149,999	1,870	4,070	5,900	7,100	8,220	9,320	10,520	11,720	12,920	14,120	14,980	15,180
\$150,000 - 239,999	2,040	4,440	6,470	7,870	9,190	10,390	11,590	12,790	13,990	15,190	16,050	16,250
\$240,000 - 259,999	2,040	4,440	6,470	7,870	9,190	10,390	11,590	12,790	13,990	15,520	17,170	18,170
\$260,000 - 279,999	2,040	4,440	6,470	7,870	9,190	10,390	11,590	13,120	15,120	17,120	18,770	19,770
\$280,000 - 299,999	2,040	4,440	6,470	7,870	9,190	10,720	12,720	14,720	16,720	18,720	20,370	21,370
\$300,000 - 319,999	2,040	4,440	6,470	8,200	10,320	12,320	14,320	16,320	18,320	20,320	21,970	22,970
\$320,000 - 364,999	2,720	5,920	8,750	10,950	13,070	15,070	17,070	19,070	21,290	23,590	25,540	26,840
\$365,000 - 524,999	2,970	6,470	9,600	12,100	14,530	16,830	19,130	21,430	23,730	26,030	27,980	29,280
\$525,000 and over	3,140	6,840	10,170	12,870	15,500	18,000	20,500	23,000	25,500	28,000	30,150	31,650

**Single or Married Filing Separately**

Higher Paying Job Annual Taxable Wage & Salary	Lower Paying Job Annual Taxable Wage & Salary											
	\$0 - 9,999	\$10,000 - 19,999	\$20,000 - 29,999	\$30,000 - 39,999	\$40,000 - 49,999	\$50,000 - 59,999	\$60,000 - 69,999	\$70,000 - 79,999	\$80,000 - 89,999	\$90,000 - 99,999	\$100,000 - 109,999	\$110,000 - 120,000
\$0 - 9,999	\$460	\$940	\$1,020	\$1,020	\$1,470	\$1,870	\$1,870	\$1,870	\$1,870	\$2,040	\$2,040	\$2,040
\$10,000 - 19,999	940	1,530	1,610	2,060	3,060	3,460	3,460	3,460	3,640	3,830	3,830	3,830
\$20,000 - 29,999	1,020	1,610	2,130	3,130	4,130	4,540	4,540	4,720	4,920	5,110	5,110	5,110
\$30,000 - 39,999	1,020	2,060	3,130	4,130	5,130	5,540	5,720	5,920	6,120	6,310	6,310	6,310
\$40,000 - 59,999	1,870	3,460	4,540	5,540	6,690	7,290	7,490	7,690	7,890	8,080	8,080	8,080
\$60,000 - 79,999	1,870	3,460	4,690	5,890	7,090	7,690	7,890	8,090	8,290	8,480	9,260	10,060
\$80,000 - 99,999	2,020	3,810	5,090	6,290	7,490	8,090	8,290	8,490	9,470	10,460	11,260	12,060
\$100,000 - 124,999	2,040	3,830	5,110	6,310	7,510	8,430	9,430	10,430	11,430	12,420	13,520	14,620
\$125,000 - 149,999	2,040	3,830	5,110	7,030	9,030	10,430	11,430	12,580	13,880	15,170	16,270	17,370
\$150,000 - 174,999	2,360	4,950	7,030	9,030	11,030	12,730	14,030	15,330	16,630	17,920	19,020	20,120
\$175,000 - 199,999	2,720	5,310	7,540	9,840	12,140	13,840	15,140	16,440	17,740	19,030	20,130	21,230
\$200,000 - 249,999	2,970	5,860	8,240	10,540	12,840	14,540	15,840	17,140	18,440	19,730	20,830	21,930
\$250,000 - 399,999	2,970	5,860	8,240	10,540	12,840	14,540	15,840	17,140	18,440	19,730	20,830	21,930
\$400,000 - 449,999	2,970	5,860	8,240	10,540	12,840	14,540	15,840	17,140	18,450	19,940	21,240	22,540
\$450,000 and over	3,140	6,230	8,810	11,310	13,810	15,710	17,210	18,710	20,210	21,700	23,000	24,300

**Head of Household**

Higher Paying Job Annual Taxable Wage & Salary	Lower Paying Job Annual Taxable Wage & Salary											
	\$0 - 9,999	\$10,000 - 19,999	\$20,000 - 29,999	\$30,000 - 39,999	\$40,000 - 49,999	\$50,000 - 59,999	\$60,000 - 69,999	\$70,000 - 79,999	\$80,000 - 89,999	\$90,000 - 99,999	\$100,000 - 109,999	\$110,000 - 120,000
\$0 - 9,999	\$0	\$830	\$930	\$1,020	\$1,020	\$1,020	\$1,480	\$1,870	\$1,870	\$1,930	\$2,040	\$2,040
\$10,000 - 19,999	830	1,920	2,130	2,220	2,220	2,680	3,680	4,070	4,130	4,330	4,440	4,440
\$20,000 - 29,999	930	2,130	2,350	2,430	2,900	3,900	4,900	5,340	5,540	5,740	5,850	5,850
\$30,000 - 39,999	1,020	2,220	2,430	2,980	3,980	4,980	6,040	6,630	6,830	7,030	7,140	7,140
\$40,000 - 59,999	1,020	2,530	3,750	4,830	5,860	7,060	8,260	8,850	9,050	9,250	9,360	9,360
\$60,000 - 79,999	1,870	4,070	5,310	6,600	7,800	9,000	10,200	10,780	10,980	11,180	11,580	12,380
\$80,000 - 99,999	1,900	4,300	5,710	7,000	8,200	9,400	10,600	11,180	11,670	12,670	13,580	14,380
\$100,000 - 124,999	2,040	4,440	5,850	7,140	8,340	9,540	11,360	12,750	13,750	14,750	15,770	16,870
\$125,000 - 149,999	2,040	4,440	5,850	7,360	9,360	11,360	13,360	14,750	16,010	17,310	18,520	19,620
\$150,000 - 174,999	2,040	5,060	7,280	9,360	11,360	13,480	15,780	17,460	18,760	20,060	21,270	22,370
\$175,000 - 199,999	2,720	5,920	8,130	10,480	12,780	15,080	17,380	19,070	20,370	21,670	22,880	23,980
\$200,000 - 249,999	2,970	6,470	8,990	11,370	13,670	15,970	18,270	19,960	21,260	22,560	23,770	24,870
\$250,000 - 349,999	2,970	6,470	8,990	11,370	13,670	15,970	18,270	19,960	21,260	22,560	23,770	24,870
\$350,000 - 449,999	2,970	6,470	8,990	11,370	13,670	15,970	18,270	19,960	21,260	22,560	23,900	25,200
\$450,000 and over	3,140	6,840	9,560	12,140	14,640	17,140	19,640	21,530	23,030	24,530	25,940	27,240

## **IF YOU ARE CLAIMING “EXEMPT” ON YOUR FEDERAL OR STATE W-4**

### **From the instructions on the Federal W-4 (top left corner of page 1):**

Exemption from withholding: If you are exempt, complete lines 1, 2, 3, 4 and 7 and sign the form to validate it. Your exemption for (any year) **EXPIRES February 15 (FOLLOWING YEAR)**. See Pub. 505, Tax Withholding and Estimated Tax.

**WHAT THIS MEANS:** If you claim exempt you are declaring that you will owe NO federal income tax. If you claim exempt, you will have NO FEDERAL income tax taken out of your check. If you claim exempt, your W-4 form will **EXPIRE** every February and must be replaced. This is **YOUR RESPONSIBILITY**.

### **From the Missouri State W-4, line 4:**

**EXEMPT STATUS:** If you had a right to a refund to **ALL** of your Missouri income tax withheld last year because you had **NO** tax liability and this year you expect a refund of **ALL** Missouri income tax withheld because you expect to have **NO** tax liability, write “EXEMPT” on Line 4. See Information below.

(There is additional information at the bottom of the page under Items to Remember, for people who qualify for the EXEMPT status due to the Military Spouses Residency Relief Act” and documents that must be supplied to your employer)

W-4 forms are turned in at times with both allowances and the word exempt. That voids the form and we must get a new one.

**If you are claiming exempt, please sign this page to be attached to your W-4 that you fully understand what it means to claim this status, that NO federal or state tax will be taken out of your check and you are fully responsible for any federal or state tax liability you may have when you file your federal and state tax returns. This form must be received with any W-4 claiming exempt status, or the payroll department will contact you to either obtain a signed copy, or get a new corrected W-4.**

**I \_\_\_\_\_ UNDERSTAND THAT I WILL HAVE NO FEDERAL OR STATE TAXES WITHHELD FROM MY PAY CHECKS, THAT I AM RESPONSIBLE FOR ANY FEDERAL OR STATE TAX LIABILITY I HAVE FOR THE YEAR, AND I WILL REPLACE EXPIRED EXEMPT W-4 FORMS EACH FEBRUARY.**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

# OZARKS AREA COMMUNITY ACTION CORPORATION

## AUTHORIZATION FORM FOR DIRECT DEPOSIT OF PAYROLL

PRINT NAME: LAST

FIRST

MIDDLE

SOCIAL SECURITY NUMBER

### CHECK APPLICABLE BOX

☐

#### NEW ENROLLMENT

Complete and sign this form. Attach a voided check for each account or paperwork from the bank (not a deposit slip).

☐

#### CHANGE OF ACCOUNT

Complete and sign this form. Attach a voided check or deposit slip for the new account.

### ACCOUNT INFORMATION

Type of Account (check one)

☐

Checking

☐

Savings

Bank, Credit Union, or Savings

Name:

Address:

City:

State:

Zip:

### REQUIRED - ATTACH A VOIDED CHECK OR DIRECT DEPOSIT LETTER FROM YOUR BANK

NOTE: DEPOSIT SLIPS ARE NOT ACCEPTABLE, THE ROUTING NUMBER MAY NOT BE CORRECT. HANDWRITTEN INFORMATION ON THIS FORM IS ALSO NOT ACCEPTABLE.

### Authorization Statement

I hereby authorize the Ozarks Area Community Action Corporation to deposit my net pay amount to my checking or savings account at the financial institution named above. I agree that if any funds are deposited in error to my account, the Ozarks Area Community Action Corporation may recover such funds directly from my account. This authority will remain in effect until I have signed a new authorization. I understand that any change or cancellation must be received by the Payroll Department by Friday to take effect the following pay day.

Employee Signature

Date

### IMPORTANT NOTE - PLEASE READ

YOU MAY RECEIVE A CHECK FOR YOUR FIRST PAYROLL. SETTING UP A DIRECT DEPOSIT MAY TAKE TIME. PLEASE ALWAYS VERIFY THAT YOUR FUNDS ARE IN YOUR ACCOUNT BEFORE ASSUMING YOU HAVE BEEN PAID. A CHECK WILL BE SIGNED; A DIRECT DEPOSIT VOUCHER WILL SAY NOT NEGOTIABLE.

THE FEDERAL RESERVE GUARANTEES DEPOSIT OF FUNDS DURING THE DAY OF PAY DAY - TIMES OF THE DAY THAT FUNDS ARE DEPOSITED WILL VARY DEPENDING ON YOUR BANK.



Empowering People, Enriching Communities

## Ozarks Area Community Action Corporation

*Carl Rosenkranz, Executive Director*

215 S. Barnes Avenue  
Springfield, MO 65802-2204  
Office: 417-862-4314 | Fax: 417-864-3499  
[www.oac.ac](http://www.oac.ac)

THE FOLLOWING FORM (DIRECT DEPOSIT DEDUCTION FROM PAYROLL) IS USED TO DEPOSIT SOME OF YOUR NET PAY INTO A SECOND BANK ACCOUNT.

SOME EXAMPLES OF A SECOND BANK ACCOUNT:

- SAVINGS ACCOUNT
- CHRISTMAS CLUB
- EMERGENCY SAVINGS ACCOUNT

**ONLY COMPLETE THIS FORM IF YOU WANT YOUR NET PAY DEPOSITED INTO MORE THAN ONE BANK ACCOUNT.**

Family Planning | Foster Grandparents | Head Start/Early Head Start | Housing Assistance  
Low-Income Home Energy Assistance Program | Neighborhood Centers | Weatherization Assistance

### **Serving Ten Counties:**

Barry | Christian | Dade | Dallas | Greene | Lawrence | Polk | Stone | Taney | Webster  
Equal Opportunity Employer. All services provided on a non-discriminatory basis.

# OZARKS AREA COMMUNITY ACTION CORPORATION

## AUTHORIZATION FORM FOR DIRECT DEPOSIT OF DEDUCTIONS FROM PAYROLL (This is not an authorization for direct deposit of your net pay)

PRINT NAME: LAST

FIRST

MIDDLE

SOCIAL SECURITY NUMBER

### CHECK APPLICABLE BOX

☐

#### NEW ENROLLMENT

Complete and sign this form. Attach a voided check for each account or paperwork from the bank (not a deposit slip).

☐

#### CHANGE OF ACCOUNT

Complete and sign this form. Attach a voided check or deposit slip for the new account.

☐

#### CHANGE AMOUNT OF DEDUCTION

NO change to deposit institution

### ACCOUNT INFORMATION

Bank, Credit Union, or Savings & Loan

☐

Type of Account (check one)

Checking

☐

Savings

Name: \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_

ZIP \_\_\_\_\_

### AMOUNT OF DEDUCTION PER PAY PERIOD

\$ \_\_\_\_\_

The deduction will be taken from each paycheck to be forwarded to this bank / credit union with the same effective date as your paycheck.

### Authorization Statement

I hereby authorize the Ozarks Area Community Action Corporation to deposit my net pay amount to my checking or savings account at the financial institution named above. I agree that if any funds are deposited in error to my account, the Ozarks Area Community Action Corporation may recover such funds directly from my account. This authority will remain in effect until I have signed a new authorization. I understand that any change or cancellation must be received by the Payroll Department by Friday to take effect the following pay day.

### REQUIRED - ATTACH VOIDED CHECK OR DIRECT DEPOSIT LETTER FROM YOUR BANK / CREDIT UNION

NOTE: DEPOSIT SLIPS ARE NOT ACCEPTABLE, THE ROUTING NUMBER MAY NOT BE CORRECT. HAND WRITTEN INFORMATION IS ALSO NOT ACCEPTABLE.

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date



**Empowering People, Enriching Communities**

## **Ozarks Area Community Action Corporation**

*Carl Rosenkranz, Executive Director*

215 S. Barnes Avenue  
Springfield, MO 65802-2204  
Office: 417-862-4314 | Fax: 417-864-3499  
[www.oac.ac](http://www.oac.ac)

Dear Valued Substitute,

You have elected direct deposit for your payroll, and kudos to you for the wise choice!

In order to bring about greater efficiency and cost control in the payroll process we'd like to email your pay voucher instead of USPS mailing.

Please provide the below requested information. You may return this completed and signed form by:

- email: [kdillon@oac.ac](mailto:kdillon@oac.ac)
- put in your Center's Central Office mail, Attention: Payroll
- mail directly to OACAC Central Office, Attention: Payroll  
215 South Barnes Av. Springfield, MO 65802

If you have any questions please see your Area Supervisor.

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Printed Name:

Signature:

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Email Address:

Date:

Revised: 07/28/2020



Empowering People. Enriching Communities

## Ozarks Area Community Action Corporation

### ACKNOWLEDGEMENT OF EMPLOYEE RECEIPT OF FAMILY MEDICAL LEAVE ACT RIGHTS

(Refer to FMLA poster for additional information)

#### **I understand that reason for taking FMLA leave includes any of the following:**

I hereby certify I have been informed of my rights under the Family and Medical Leave Act of 1993 on the date shown below. FMLA requires covered employers to provide up to 12 weeks of unpaid, job protected leave to eligible employees for the following reasons:

- For a serious health condition that makes the employee unable to perform the employee's job.
- For incapacity due to pregnancy, prenatal medical care or child birth.
- To care for the employee's child after birth, or placement for adoption or foster care.
- To care for the employee's spouse, son, daughter, or parent who has a serious health condition.
- Because of a qualifying exigency arising out of the fact that your spouse, son, daughter, or parent is on active duty or call to active duty status in support of a contingency operation as a member of the National Guard or Reserves. (Refer to FMLA poster for additional information for Military Family Leave Entitlements)
- Because you are the spouse, son, daughter, parent, or next of kin of a covered service member with a serious injury or illness. (Refer to FMLA poster for additional information for Military Family Leave Entitlements)

#### **Eligibility Requirements**

Employees are eligible if they have worked for a covered employer for at least one year, for 1,250 hours over the previous 12 months, and if at least 50 employees are employed by the employer within 75 miles.

#### **Substitution of Paid Leave for Unpaid Leave**

OACAC requires employees to use all paid leave while taking FMLA leave. In order to use paid leave for FMLA leave, employees must comply with the employer's normal paid leave policies.

#### **Benefits**

I understand that for the 12 weeks of FMLA leave the employer will pay the employer's share of my health, dental and life insurance. The employee's co-pay amount for the employee (and dependent(s) if applicable) will continue to be the responsibility of the employee.

#### **Employee Responsibilities**

Employees must provide 30 days advance notice of the need to take FMLA leave when the need is foreseeable. When 30 days notice is not possible, the employee must provide notice as soon as practicable and generally must comply with an employer's normal call-in procedure. Employees must provide sufficient information for the employer to determine if the leave may qualify for FMLA protection and the anticipated timing and duration of the leave. Employees will be required to provide a certification and periodic recertification supporting the need for leave.

**You have a right under FMLA for up to 12 weeks of unpaid leave in a 12-month period calculated as:**

- the 12-month period measured forward from the date of your first FMLA leave usage.

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Program/Location

\_\_\_\_\_  
Signature of Employee

\_\_\_\_\_  
Date



Empowering People, Enriching Communities

## Ozarks Area Community Action Corporation

DATE\_\_\_\_\_ CENTER/LOCATION\_\_\_\_\_

MARRIED\_\_\_\_\_ SINGLE\_\_\_\_\_ DIVORCED\_\_\_\_\_

\_\_\_\_\_  
PRINT NAME: FIRST, MIDDLE, LAST SIGNATURE

ADDRESS\_\_\_\_\_

CITY\_\_\_\_\_ STATE\_\_\_\_\_ ZIP\_\_\_\_\_

HOME PHONE\_\_\_\_\_ CELL PHONE\_\_\_\_\_

BIRTHDAY\_\_\_\_\_ SOCIAL SECURITY #\_\_\_\_\_  
(month/day/year)

### 1<sup>ST</sup> EMERGENCY CONTACT PERSON

\_\_\_\_\_  
PRINT NAME RELATIONSHIP

HOME PHONE\_\_\_\_\_ CELL PHONE\_\_\_\_\_

WORK PHONE\_\_\_\_\_

### 2<sup>ND</sup> EMERGENCY CONTACT PERSON

\_\_\_\_\_  
PRINT NAME RELATIONSHIP

HOME PHONE\_\_\_\_\_ CELL PHONE\_\_\_\_\_

WORK PHONE\_\_\_\_\_





- EMERGENCIES
- EVENT REMINDERS
- CLOSINGS DUE TO WEATHER
- CHILD WELL-BEING UPDATES

☐ New enrollment

☐ Updated enrollment Information

**Primary Parent/Guardian:**

Last Name \_\_\_\_\_ First \_\_\_\_\_ Mobile Number \_\_\_\_\_ Wireless Carrier \_\_\_\_\_  
 (if straight talk, please list carrier)  
☐ Employee? List Center \_\_\_\_\_

[illegible]

Print Child's Name \_\_\_\_\_ Center/classroom/AM/PM \_\_\_\_\_

Print Child's Name	Center/classroom/AM/PM
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Print Child's Name

Center/classroom/AM/PM

Print Child's Name	Center/classroom/AM/PM
--------------------	------------------------

**8-2016**



Empowering People, Enriching Communities

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215 S. Barnes Avenue  
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Office: 417-862-4314 | Fax: 417-864-3499  
www.oac.ac

WELCOME NEW EMPLOYEE!

You have a couple options for the handling of payroll and we highly encourage the use of direct deposit since it is safe, convenient, and guaranteed in your account on pay day.

If you prefer a live check, it will be mailed to your home no later than the pay date.

Please mark your choice below for paycheck handling. If you have any questions please see your Area Supervisor.

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Printed Name:

Signature:

Email Address:

Date:

☐ I have elected Direct Deposit      **Please provide a personal email address**

☐ Please mail my paychecks every pay period

Address: \_\_\_\_\_



**Empowering People, Enriching Communities**

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Office: 417-862-4314 | Fax: 417-864-3499  
[www.oac.ac](http://www.oac.ac)

Dear Valued Employee,

As part of the payroll file, we'd like to maintain a personal email address.

Please provide the information in the bottom portion of this form. You may return this completed and signed form by:

- email: [kdillon@oac.ac](mailto:kdillon@oac.ac)
- put in your Center's Central Office mail, Attention: Payroll
- mail directly to OACAC Central Office, Attention: Payroll  
215 South Barnes Av. Springfield, MO 65802

If you have any questions please see your Area Supervisor. Thank you!

---

Printed Name:

Signature:

---

Email Address:

Date: