

State Withholding Forms Checklist

Use this checklist before choosing a state employee withholding form.

Start with the work state

- Identify where the employee performs services.
- Check whether the state requires its own withholding certificate.
- Open the official state revenue, tax, labor, or employment agency source.

Check residence and special rules

- If work state and residence state differ, ask payroll about reciprocity or exemption rules.
- Remote workers may need extra payroll review.
- Exemption claims should be checked against official state instructions.

Before submitting

- Confirm the current form name and year.
- Submit the completed state withholding form to the employer or payroll department.
- Do not rely on unofficial PDFs without verifying the official source.

Important notice

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