

Frequently Asked Questions: Income Tax Withholding and W-4 Forms

Updated March 16, 2026

Does the local APD/AAA office have to accept information on the W-4 form they know to be false? For example, if a married HCW is claiming single status on their taxes?

No, the local office does not have to accept information they know to be false. The local office should ask the HCW complete the form correctly.

What should be done with incomplete forms that have certain fields left blank, or missing signatures?

Local offices may return the form to the HCW, especially for a missing signature. For minor missing information, the local office could choose to call the HCW and clarify what they wanted on the form. If this is done the person completing the change must add their initials next to the additional information.

How long is the Department required to keep W-4 forms in the provider file?

Per tax law, W-4s must be kept on file for no less than four years.

How to Answer Homecare Worker (HCW) W-4 Questions

I read that completing the W-4 form is voluntary but am being told the W-4 form is mandatory. Which is correct?

Tax withholding is not voluntary. SEIU Local 503, OPEU is the union that represents HCWs in bargaining. The union entered into an agreement with the Home Care Commission to have ODHS withhold income taxes for HCWs. Tax withholding was negotiated by the Homecare union.

How can I file separate state and federal W-4 forms with different withholding amounts?

You can complete two W-4 forms and write, in pen, “state” at the top of one form and “federal” on the top of the other.

Can I request to have an additional amount taken out of my taxes?

Yes.

If I claim exempt, do I ever have to send in the W-4 form again?

Yes. The W-4 form indicates how long the current exemption will remain active prior to expiration. A new W-4 form will need to be filed once the exemption expires. The HCW needs to review the W-4 form to determine when the exemption expires.

Where can I get help completing my W-4 form?

You can contact a tax expert or the Internal Revenue Service (IRS) at 1-800- 829-1040, or the Department of Revenue, at 1-800-356-4222.

You can get this document in other languages, large print, braille or a format you prefer free of charge. Contact the Aging and People with Disabilities at apd.ltss@odhs.oregon.gov or 503-945-5600. We accept all relay calls.



Aging and People with Disabilities Medicaid Services and Supports

500 Summer St. NE, E-10

Salem, OR 97301-1076

503-945-5600

odhs.info@odhs.oregon.gov

www.oregon.gov/odhs