

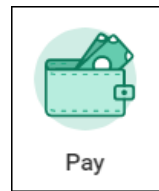
Withholding Elections (W-4)

This job aid will provide step-by-step instructions on how to enter and update federal and state Withholding Elections. If you enter or update your Federal Withholding Elections, you are **REQUIRED** to update your State Withholding Elections.

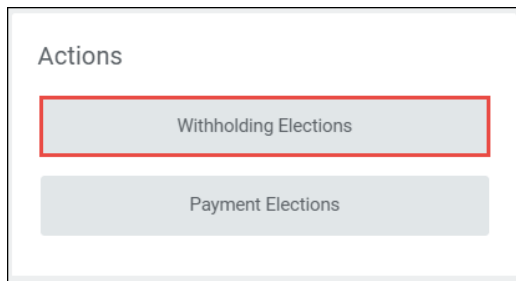


If you need tax guidance on what to enter and how it will affect your paycheck or tax obligation at the end of the year, please consult a tax professional.

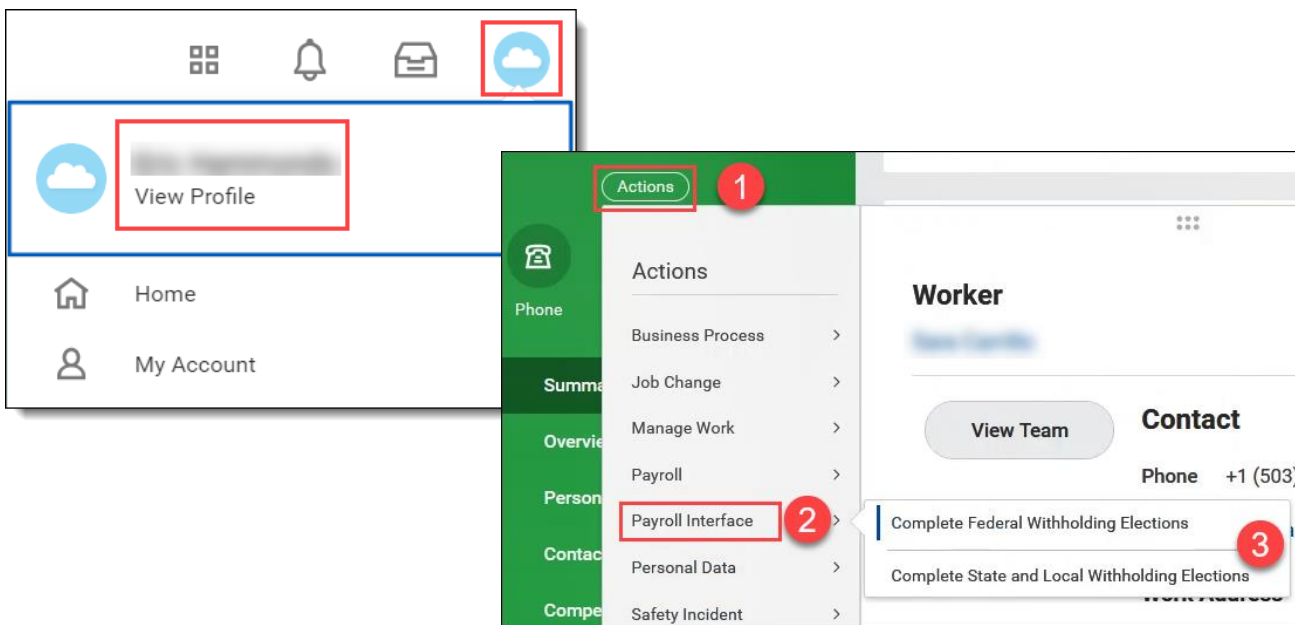
Step 1: On the *Homepage*, click on the **Pay** worklet.



Step 2: Click on **Withholding Elections**.



Note: You can also navigate to this task through your worker profile. Click on the *cloud icon* or your *photo*, and select **View Profile**. Click on **Actions** (1), hover over **Payroll Interface** (2), and select the **Withholding Elections (Federal or State)** (3).



Federal Election





For information about Federal withholdings, please see the IRS web page [About Form W-4, Employee's Withholding Certificate](#).

Step 3: From the *Withholding Elections* screen, click on the **Federal Elections** tab.

Step 4: Click **Update**.


Step 5: *Worker* and *Company* will populate. The *Effective Date* will populate with today's date. Click **OK**.



To view a blank form with general instructions and an allowance worksheet, click on **View Blank Form**. View Blank Form The form will arrive in your notifications inbox if you choose not to wait for it. 

Step 6: *Marital Status* is a required field. Click the menu prompt to select the correct **Marital Status**.

Marital Status * ☰



Marital Status is the only required field on the federal form. Only complete Steps 7 – 10 in this job aid if they apply to you; otherwise, skip to Step 11.

Step 7: Check the box for **Multiple Jobs or Spouse Works** if appropriate.

Multiple Jobs or Spouse Works

Do only one of the following:

- a. Use the estimator at www.irs.gov/W4App for the most accurate withholding; or
- b. Use the Multiple Jobs Worksheet on "view blank form" page 3 and enter the result in line Step 4(c) "Extra Withholding" below for roughly accurate withholding; or
- c. If there are only two jobs total, you may check the box above. 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.

IRS TIP: To be accurate, submit a Form W-4 for all other jobs. If you (or your spouse) have self-employment income, including as an independent contractor, use the estimator.

Step 8: Complete the fields that best represents your tax situation.

Claim Dependents
If your total income will be \$200,000 or less (\$400,000 or less if married filing jointly):

Number of Qualifying Children Under Age 17

Total Amount for Qualifying Children

Number of Other Dependents

Total Amount for Other Dependents

Calculated Total Dependent Amount

Override Total Dependent Amount

Step 4 (optional):

Other Adjustments

(a) Other Income (not from jobs)

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.

(b) Deductions

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.

(c) Extra Withholding

Extra Withholding: Enter any additional tax you want withheld each pay period.

Annualized *Dependent Amounts* are displayed here. This is the number of children/dependents multiplied by applicable credit. This amount reduces employee's tax withholding.

Step 9: If you meet the conditions and wish to be exempt from withholdings, click the **Exempt** box.
Exempt: You had no federal income tax liability in the previous year and you expect to have no federal income tax liability in the current year. Note: By checking the Exempt box you will have no federal taxes withheld.



Step 10: Check the *Nonresident Alien* box if applicable.

Step 11: Read the *LEGAL NOTICE* section and click the **I Agree** check box to certify that you understand the legal notice terms. Click **OK**.

Legal Notice Your Name and Password are considered as your "Electronic Signature" and will serve as your confirmation of the accuracy of the information being submitted. When you click in the "I Agree" checkbox, you are certifying that:


1. Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.
2. You understand that your payroll tax withholding election is a legal and binding transaction.
3. You understand that all submissions are contingent upon acceptance by your Payroll representative.

If you do not wish to use the electronic signature option, print a paper copy of the form.
The form is not valid without a signature.

I Agree

OK Cancel

State Elections

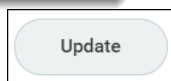


To enter and/or update your state Withholding Elections, follow Steps 1 and 2 from above and continue with the steps below.

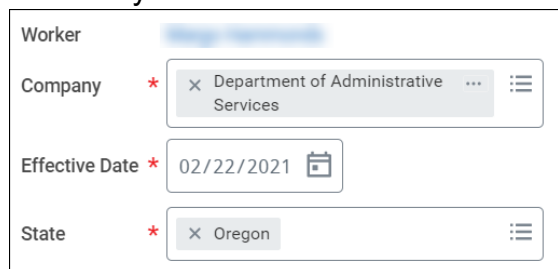
Step 3: From the *Withholding Elections* screen, click on the **State Elections** tab.


A screenshot of the "Withholding Elections" web interface. The title "Withholding Elections" is at the top in a green header. Below it is a greyed-out user profile area with an "Actions" button. The main content area shows fields for "Home Address" (Salem, OR 97301-0000, United States of America) and "Social Security Number" (redacted). At the bottom, there are two tabs: "Federal Elections" and "State Elections". The "State Elections" tab is selected and highlighted with a red rectangular border.


Step 4: Click **Update**.



Step 5: *Worker, Company, Effective Date* and *State* will auto populate. The *Effective Date* will populate with today's date. Click **OK**.





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Step 6: *Marital Status* is a required field. Click the menu prompt to select the correct **Marital Status**.



Step 7: Enter the total **Number of Allowances** you are claiming.



Step 8: Enter the **Additional Amount**, if any, you want withheld from each paycheck.



Step 9: If you meet the conditions and wish to be exempt from withholdings, click the **Exempt** box (1). If claiming Exempt status, enter the required **Exemption Code**. Click on the menu prompt to find the appropriate code (2).



Step 10: Read the *LEGAL NOTICE* section, click the **I Agree** check box to certify that you understand the legal notice terms, and then click **OK**.

