

Withholding Elections (W-4), enter or update on behalf of

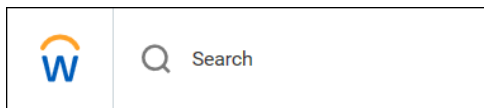
This job aid provides Payroll Partners step by step instructions on how to enter and update federal and state Withholding Elections on an employee's behalf. If you enter or update Federal Withholding Elections, you are **REQUIRED** to update the State Withholding Elections also.



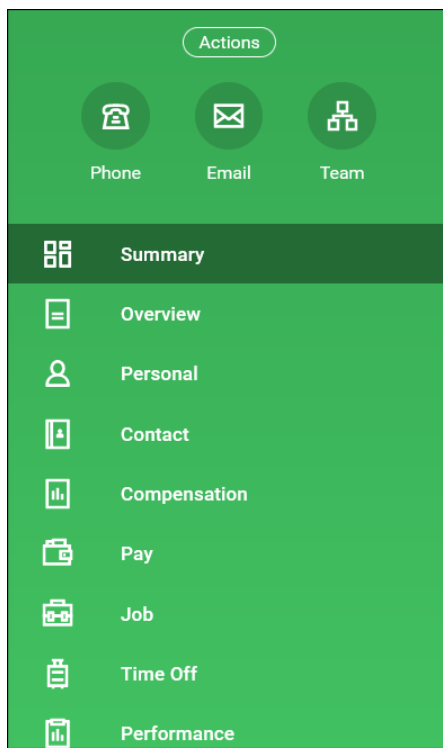
Employee's should enter their own withholding elections in Workday whenever possible.

Before proceeding with this process, you must have a signed copy of the federal and state W-4 forms from the employee, to retain in the employee's file.

Step 1: Type the employee's name you are making the change for in the search bar and select them from the search results.

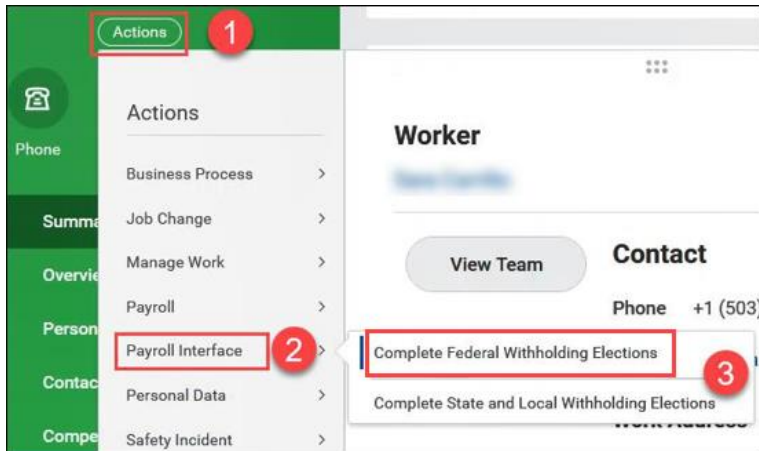


Step 2: This will take you to the employee's profile.



Federal Election

Step 3: Click on **Actions** (1), hover over **Payroll Interface** (2), and select **Complete Federal Withholding Elections** (3).



Step 4: Enter an **Effective Date** and click **OK**. Note: The effective date cannot be a date in the past.

Step 5: *Marital Status* is a required field. Click the menu prompt to select the correct **Marital Status** the employee has designated.



Marital Status is the only required field on the federal form. Steps 2 – 4 in Workday should be completed only if the employee has indicated so on the form; otherwise, skip to Step 10 of these instructions.

Step 6: Check the box for **Multiple Jobs or Spouse Works** or leave it blank per the employee's form.

Step 7: Complete the fields as the employee has indicated on their form.

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	<input type="text" value="0"/>
Total Amount for Qualifying Children	0.00
Number of Other Dependents	<input type="text" value="0"/>
Total Amount for Other Dependents	0.00
Calculated Total Dependent Amount	0.00
Override Total Dependent Amount	<input type="text" value="0.00"/>
Step 4 (optional):	
Other Adjustments	
(a) Other Income (not from jobs)	<input type="text" value="0.00"/>
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	<input type="text" value="0.00"/>
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	<input type="text" value="0.00"/>
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 amount.

Step 8: Click the **Exempt box if the employee has indicated on the form that they wish to be exempt from withholdings. Exempt: Employee had no federal income tax liability in the previous year, and they expect to have no federal income tax liability in the current year. Note: By checking the Exempt box the employee will have no federal taxes withheld.**

Exempt	<input type="checkbox"/>
---------------	--------------------------

Step 9: Check the *Nonresident Alien* box if the employee has indicated this status on the form.

Nonresident Alien	<input type="checkbox"/>
--------------------------	--------------------------

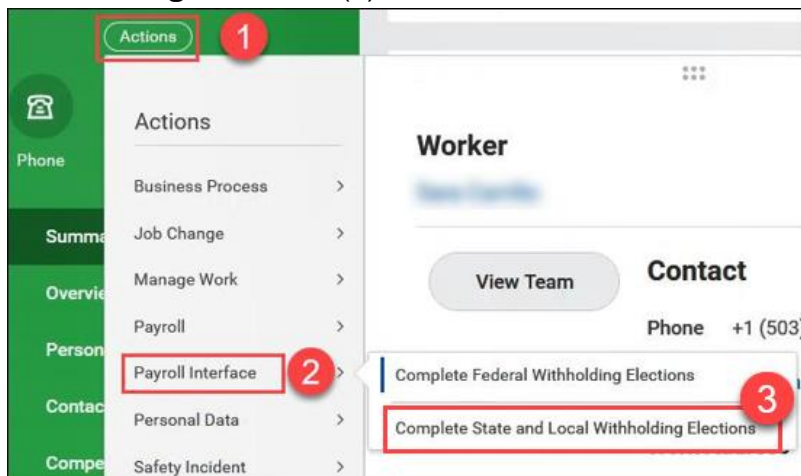
Step 10: Click **OK. File the employee's signed W-4 form in the employee's payroll file; they should not be uploaded to Workday.**

State Elections



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

Step 3: Click on **Actions** (1), hover over **Payroll Interface** (2), and select **Complete State and Local Withholding Elections** (3).



Step 4: The *Worker* and *Company* will default. The **Effective Date** will default to today's date but can be changed to a date in the future if appropriate. Click on the menu prompt to select the **State**. Click **OK**.

Note: The effective date cannot be a date in the past.

Worker *	<input type="text" value="x [redacted] ..."/>
Company *	<input type="text" value="x Department of Administrative Services ..."/>
Effective Date *	<input type="text" value="07/23/2021"/> <input type="calendar"/>
State *	<input type="text" value="x Oregon"/> <input type="list"/>

Step 5: *Marital Status* is a required field. Click the menu prompt to select the correct **Marital Status** the employee has designated.

Marital Status *	<input type="text"/> <input type="list"/>
------------------	---

Step 6: Enter the total **Number of Allowances** the employee is claiming.

Number of Allowances	<input type="text" value="0"/>
----------------------	--------------------------------

Step 7: Enter the **Additional Amount**, if any, the employee wants withheld from each paycheck.

Additional Amount	<input type="text" value="0.00"/>
-------------------	-----------------------------------

Step 8: If the employee has indicated on the form, they wish to be exempt from withholdings, click the **Exempt** box (1). If claiming *Exempt* status, click on the menu prompt to find the appropriate **Exemption Code** (2).

Exempt	<input checked="" type="checkbox"/>
Exemption Code *	<input type="text"/>

Step 9: Click **OK**. File the employee's signed W-4 form in the employee's payroll file; they should not be uploaded to Workday.