ESS – Payroll – W-4 Information

1. **W-4 Information** - Allows employees to manage their W-4 (federal withholding).

   **NOTE:** Employees who need to claim an **Exempt** status must contact their payroll office.

1.1. Changes to W-4 are made by selecting **W-4 Tax Withholding** under **Payroll**.

1.2. Upon entering the screen, the **W-4 Information** section towards the bottom of the screen will be locked from editing. To begin making updates, select the button for **Update W-4 Withholding** at the top of the screen as illustrated.

![W-4 Withholding Information](image)
1.3. Once the button for Update W-4 Withholding has been selected, the W-4 Information section will unlock for editing as illustrated.

**Form W-4 Field Descriptions and Instructions**

The fields within the W-4 Information section directly correspond to the steps on the IRS Form W-4 2020 or later. It is recommended that employees refer directly to the Form W-4 and instructions to determine the values for the following fields on the screen.

**Step 1c – Filing Status:** choose the appropriate filing status for the Form W-4 from the drop-down menu.

*Check this box if you have checked the box in Step 2c on the Form W-4:* according to the Form W-4, use this checkbox “if there are only two jobs total...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.”

**Step 3 - Total Amount for Dependents:** the value entered here is calculated during Step 3: Claim Dependents and is the total from line 3 of the Form W-4. If you are not claiming credits for dependents, leave the default value of 0.00.

**Step 4a - Other Income (Not From Jobs):** the value entered here is calculated during Step 4 (optional): Other Adjustments and is the value from line 4(a) of the W-4 form. If you are not entering other income, leave the default value of 0.00.

**Step 4b - Additional Deductions from Deductions Worksheet:** the value entered here is calculated during Step 4 (optional): Other Adjustments and is the value from line 4(b) of the Form W-4. If you are not entering deductions, leave the default value of 0.00.

**Step 4c - Extra Withholding Each Pay Period:** the value entered here is calculated during Step 4 (optional): Other Adjustments and is the value from line 4(c) of the Form W-4. If you are not entering an additional amount, leave the default value of 0.00.
1.4. When entering dollar amounts in Step 3, Step 4a, Step 4b, or Step 4c, it is critical not to use any special characters such as commas or dollar signs. For example, if entering $6,000.00, it should be entered into the field as 6000 or 6000.00. The following table should be used as a guideline for entering dollar values within these four fields:

<table>
<thead>
<tr>
<th>Dollar value to be entered:</th>
<th>Enter on the screen as:</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.00</td>
<td>0 or 0.00</td>
</tr>
<tr>
<td>10.00</td>
<td>10 or 10.00</td>
</tr>
<tr>
<td>100.00</td>
<td>100 or 100.00</td>
</tr>
<tr>
<td>1,000.00</td>
<td>1000 or 1000.00</td>
</tr>
<tr>
<td>10,000.00</td>
<td>10000 or 10000.00</td>
</tr>
<tr>
<td>100,000.00</td>
<td>100000 or 100000.00</td>
</tr>
</tbody>
</table>

NOTE: If an invalid character is entered, an error message will be displayed as illustrated. Employees must correct the error as instructed above in step 1.4.

1.5. When finished entering changes, select the checkbox, “Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete.”
1.6. The Save button will now be activated. Select Save.

NOTE: To cancel changes, select the Cancel button, which will reset the form to the original entries prior to making changes.

1.7. A confirmation message will appear indicating changes have been saved successfully. To make additional changes, repeat steps 1.2 through 1.6.

NOTE: Changes made are effective the first day of the next pay period. Once changes are submitted, the next pay period date is shown on the ESS screen. Please note previous pay period elections are preserved.