Employee Self Service Job Aid:



Tax Withholding



It is recommended to use a Microsoft Edge browser to ensure the form opens correctly. If using a different browser, make sure your browser is set up to open PDFs directly in an Adobe application.

If your browser already defaults to open PDFs directly in an Adobe application, click on the corresponding link below to skip to instructions for updating taxes:

- Enter or Update Federal Tax Withholding
- Enter or Update State Tax Withholding

Open PDFs in Microsoft Edge

NOTE: The first option defaults all PDFs to open in an Adobe application in your Edge browser. If you prefer to do this manually each time for tax updates, refer to <u>Option 2</u>.

Option 1: To disable PDF files in Edge and use an external Adobe application instead, open the Edge browser, click •••• and select *Settings*.

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	New tab		Ctrl+T	
	New window		Ctrl+N	
Ę	New InPrivate window	Ctrl	+Shift+N	
	Zoom —	100%	+	2
₹	Favorites	Ctrl	+Shift+O	
Ē	Collections	Ctrl	+Shift+Y	
5	History		Ctrl+H	
$\overline{\uparrow}$	Downloads		Ctrl+J	
B	Apps			>
3	Extensions			
÷	Performance			
Ø	Print		Ctrl+P	
Ø	Web capture	Ctrl	+Shift+S	
Ē	Share			
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A∌	Read aloud	Ctrl	+Shift+U	
	More tools			>
ŝ	Settings			
0	Help and feedback			>
	Close Microsoft Edge			
ð	Managed by your organization	n		



Click on *Cookies and site permissions* then scroll down to *PDF documents* and select it from the menu.

Settings	Pop-ups and redirects Allowed	>
Q Search settings	Ads Blocked	>
Profiles Privacy, search, and services	G Background sync Allow recently closed sites to finish sending and receiving data	>
Start, home, and new tabs	Automatic downloads Ask when a site tries to download multiple files automatically	>
Cookies and site permissions	Protocol handlers Allow sites to ask to become default handlers for protocols	>
↓ Downloads 쯍 Family	MIDI devices Ask when a site wants to use system exclusive messages to access MIDI devices	>
A ^t Languages	⊕ Zoom levels	>
System and performance Reset settings	USB devices Ask when a site wants to access USB devices	>
 Phone and other devices Accessibility 	Serial ports Ask when a site wants to access serial ports	>
About Microsoft Edge	File editing Ask when a site wants to edit files or folders on your device	>
	DF documents	>

Click on the slider to make Edge always download PDF files.

permissions / PDF documents	
ways download PDF files wnload PDF files to your device. If Microsoft Edge is your default PDF reader, PDF files will open automatically without downloading.	
PF view settings en PDFs to last viewed location when you reopen files	
	permissions / PDF documents ways download PDF files wnload PDF files to your device. If Microsoft Edge is your default PDF reader, PDF files will open automatically without downloading. VF view settings en PDFs to last viewed location when you reopen files



Option 2: When prompted to open the tax form in ESS, hover over the top row containing the PDF file and click in the *Downloads* folder popup.

	1	
Federal Tax Withholding Forms	Downloads	
Company State of Wisconsin	PYTWF_FEDE (56).pdf Open file	Show in folde
'ou must complete Form W-4 so that the correct amount of federal tax is withheld from your paychec vithheld from your wages based on marital status and the number of allowances claimed on this form idditional dollar amount be withheld. You can file a new Form W-4 anytime your tax situation change nore, or less, tax withheld.	ks. Federal income tax is n. You may also specify that an s and you choose to have	
The number of allowances or exemptions from withholding you are claiming is subject to review and pequired to send a copy of this form to the IRS.	your employer may be	
ou may make changes to your withholding allowances online using the link below. A fill-in PDF vers at you may enter your changes and submit to payroll electronically. Your browser must use Adobe A ocument reader for the "Submit" button to be visible. After submitting, a confirmation page will open ubmitted form. Be sure to print or save a copy of the completed form for your records.	ion of the form will open so Acrobat as the default that includes a copy of your	
Updateable Forms		
Form Description		
Federal Withholding Allowance Certificate	>	

Double-click on the most recent download in your *Downloads* folder in File Explorer to open in an Adobe application.

Today (11)			
PYTWF_FEDE (56)	6/17/2022 9:39 AM	Adobe Acrobat D	107 KB

Enter or Update Federal Tax Withholding

 Interaction
 VErsphyred Sdf Service
 Image: Control of the service state state

From the **Employee Self Service Homepage**, select *My Payroll*.

Select Tax Withholding.

✓ Employee Set Service		Му	Payroll		6 Q Q I 0
	Ę	Paychecks Pay Date 01/14/2021 Net Pay Taxes Deductions Total (Person 1	W-2W-2c Consent	W-2/W-2c Forms	
	Direct Deposit	Tax Withholding	Consent received	2020 W-2 Form available	
	1 Account	C			



Click anywhere on the Federal tax row.

Tax With	holding					
Company	State of Wisconsin					
Status	Active					
Form Type	Jurisdiction			Withholding Details		
Federal	Federal	Tax Status	Single	Dependent Amount	0.00	
		Other Income	0.00	Deductions	0.00	>
		Extra Withholding	0.00	Other		
State	Wisconsin	Tax Status	Single	Withholding Allowances	0	
		Additional Amount	0.00	Additional Allowances		>
		Additional Percentage		Other		

Click on Federal Withholding Allowance Certificate.

	Federal Tax Withholding Forms	
Company State of Wisconsir	1	
You must complete Form W-4 withheld from your wages bas additional dollar amount be wi or less, tax withheld.	so that the correct amount of federal tax is withheld from your paychecks. Federal income tax is ed on marital status and the number of allowances claimed on this form. You may also specify that an thheld. You can file a new Form W-4 anytime your tax situation changes and you choose to have more	1
The number of allowances or to send a copy of this form to t	exemptions from withholding you are claiming is subject to review and your employer may be required the IRS.	
You may make changes to you you may enter your changes a reader for the "Submit" button form. Be sure to print or save	ur withholding allowances online using the link below. A fill-in PDF version of the form will open so that and submit to payroll electronically. Your browser must use Adobe Acrobat as the default document to be visible. After submitting, a confirmation page will open that includes a copy of your submitted a copy of the completed form for your records.	
Updateable Forms		

Click OK to download tax form.

WARNING
The system will download a copy of the tax form which contains personal information. You should only continue if you are using a trusted and secure computer. You should not continue if you are using a shared or public computer (such as those in a library or café). Doing this could leave your personal information vulnerable.
OK Cancel



Open file in an Adobe application.

NOTE: Refer to <u>Option 2</u> if using an Edge browser and PDFs are set to open in Edge.

Step 1: Your personal information will auto-populate. Check the appropriate marital status.

Form W-4 (Rev. December 20 Department of the Tr Internal Revenue Ser	W-4 Employee's Withholding Certificate Iev. December 2020) Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Partment of the Treasury Give Form W-4 to your employer. Your withholding is subject to review by the IRS.				OMB No. 1545-0074	
Step 1:	(a) F	irst name and middle initial	Last name	(b) \$	Social security number	
Enter			08000	XXX	-XX·	
Dorsonal	Addre	ddress		► Do	Does your name match the	
Information		DATALON LANE		card?	f not, to ensure you get	
information	City of	ity or town, state, and ZIP code		credit	it for your earnings, contact	
		DECK, PHEN'IS		WWW.	ssa.gov.	
	(c)	Single or Married filing separately				
		Married filing jointly or Qualifying widow(er)				
		Head of household (Check only if you're unmar	ried and pay more than half the costs of keeping up a home for yo	urself a	and a qualifying individual.)	
Complete Ste	Commisto Store C. 4. ONI V if they amply to your otherwise, align to Store F. Soo many 0 for more information on each store, who can				aach stan, who can	

Complete Steps 2–4 ONLY if they apply to you; otherwise, skip to Step 5. See page 2 for more information on each step, who can claim exemption from withholding, when to use the estimator at *www.irs.gov/W4App*, and privacy.

Step 2: If you have multiple jobs or are married filing jointly and your spouse also works, check the box on the right.

Step 2: Multiple Jobs	Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs.
or Spouse	Do only one of the following.
Works	(a) Use the estimator at www.irs.gov/W4App for most accurate withholding for this step (and Steps 3-4); or
	(b) Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below for roughly accurate withholding; or
	(c) If there are only two jobs total, you may check this box. 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 ▶
	TIP: To be accurate, submit a 2021 Form W-4 for all other jobs. If you (or your spouse) have self-employment income, including as an independent contractor, use the estimator.
Complete Steps 3 be most accurate i	3–4(b) on Form W-4 for only ONE of these jobs. Leave those steps blank for the other jobs. (Your withholding will if you complete Steps 3–4(b) on the Form W-4 for the highest paying job.)

Step 3: If you want to claim dependents, fill in both boxes on the left and make sure to use multiples of \$2,000 and \$500 for qualifying children and other dependents, respectively. The total will calculate automatically at the bottom.

Step 3:	If your income will be \$200,000 or less (\$400,000 or less if married filing jointly):		
Claim Dependents	Multiply the number of qualifying children under age 17 by \$2,000 ► \$		
	Multiply the number of other dependents by \$500		
	Add the amounts above and enter the total here	3	\$



Step 4: If you want to include other adjustments (Other income, deductions or extra withholding), fill in boxes a, b, and c with dollar amounts. If you want to claim exemption from withholding, select Exempt from the dropdown.

NOTE: If this is your first time submitting a W-4 since the form changed in 2020 and you enter an amount greater than \$0 in Extra Withholding, you must submit this form twice to ensure the additional tax is withheld.

Step 4 (optional): Other	(a) 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	4(a) \$
Adjustments	(b) 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	4(b) \$
Exemption from withholding expect to owe no Federal ir	(c) Extra withholding. Enter any additional tax you want withheld each pay period . By claiming exemption from withholding, you certify that you owed no Federal income tax in 2021, and that you come tax in 2022. If you claim exemption from withholding, no income tax will be withheld from your paycheck.	4(c) \$ Not Applicable •

Step 5: Your signature and today's date will auto-populate.

Step 6: Click Submit.

For Privacy Act and Paperwork Reduction Act Notice, see page 3.	Cat. No. 10220Q	Form W-4 (2021)
		Submit

Enter your IAM and password and click OK.

Windows Security	check here. You must call	X
The server The server repo	is asking for your user name and password. orts that it is from PeopleSoft Enterprise PeopleTools.	
	smithjabcd Remember my credentials	
	OK Cancel	

If a warning popup message appears, click OK. The form will continue processing normally.





A confirmation page will appear with a copy of your completed form. You may print/save a copy for your records.

The changes you have made to your Employee Withholding Allowance Certificate have been successfully submitted to payroll on 2022-06-29. You can scroll to the next page to view your saved data or print/save a copy of this document for your records. If you received a message indicating JAVA was unable to retrieve the Submit button from a report template and you are an Acrobat Pro user, you can disregard the warning. Your changes have been saved. Please be advised when you close this document the original PDF document remains open for your reference. To exit the application process, you will need to close both the original and the updated PDF documents. If you need to make additional changes, you must navigate back to the Tax Withholding Forms page and begin the process again.

Return to Employee Self Service and click on *Tax Withholding* to refresh page.



View updated tax withholdings.

Tax With	holding					
Company	State of Wisconsin					
Status	Active					
Form Type	Jurisdiction		١	Withholding Details		
Federal	Federal	Tax Status	Married	Dependent Amount	1000.00	
		Other Income	0.00	Deductions	0.00	,
		Extra Withholding	0.00	Other		
State	Wisconsin	Tax Status	Single	Withholding Allowances	0	
		Additional Amount	0.00	Additional Allowances	>	,
		Additional Percentage		Other		



Enter or Update State Tax Withholding

From the Employee Self Service Homepage, select My Payroll.

Select Tax Withholding.

My Payrol û				
Paychas	tks Pay Date 01/14/2021 Not Pay Taxes Deductions Total Gross 1	W 2W 2c Cossent	W-2W-2c Forms	
Direct Deposit 1 Account	Tax Withholding			

Click anywhere on the State tax row.

Tax With	holding					
Company	State of Wisconsin					
Status	Active					
Form Type	Jurisdiction			Withholding Details		
Federal	Federal	Tax Status	Single	Dependent Amount	0.00	
		Other Income	0.00	Deductions	0.00	>
		Extra Withholding	0.00	Other		
State	Wisconsin	Tax Status	Single	Withholding Allowances	0	
		Additional Amount	0.00	Additional Allowances		>
		Additional Percentage		Other		



Click on Wisconsin Withholding Allowance Certificate.

State Tax Withholding Forms
Company State of Wisconsin
You must complete Wisconsin Form WT-4 so that the correct amount of state tax is withheld from your paychecks. State income tax is withheld from your wages based on marital status and the number of allowances claimed on this form. You can file a new Form WT-4 anytime your tax situation changes and you choose to have more, or less, tax withheld.
The number of allowances or exemptions from withholding you are claiming is subject to review and your employer may be required to send a copy of this form to the WI DOR.
You may make changes to your withholding allowances online using the link below. A fill-in PDF version of the form will open so that you may enter your changes and submit to payroll electronically. Your browser must use Adobe Acrobat as the default document reader for the "Submit" button to be visible. After submitting, a confirmation page will open that includes a copy of your submitted form. Be sure to print or save a copy of the completed form for your records.
Updateable Forms
Form Description
Wisconsin Withholding Allowance Certificate

Click OK to download tax form.

	WARNING			
The system will download a copy of the tax form which contains personal information. You should only continue if you are using a trusted and secure computer. You should not continue if you are using a shared or public computer (such as those in a library or café). Doing this could leave your personal information vulner				
	OK Cancel			

Open file in an Adobe application.

NOTE: Refer to <u>Option 2</u> if using an Edge browser and PDFs are set to open in Edge.



Update marital status, date of birth, date of hire, allowances in (a)-(c) for (d) to auto-populate, and/or additional amount, then click Submit. If you want to claim exemption from withholding, select Exempt from the dropdown.

Employee's Wisconsin	With	holding Ex	emption Certificate/	New Hire Reporting WT-4
Employee's Section (Print clearly)				
Employee's legal name (first name, middle initial, last na	ame)		Social security number	Single
			XXX-XX-	Married
Employee's address (number and street)				Married, but withhold at higher Single
City	State	Zin codo	Data of hiro	rate.
City	Jiale	Zip code	06/06/2022	Note: If married, but legally separated, check the Single box.
 Complete Lines 1 through 3 1. (a) Exemption for yourself – enter 1 (b) Exemption for your spouse – enter 1 (c) Exemption(s) for dependent(s) – you are (d) Total – add lines (a) through (c) 2. Additional amount per pay period you want de 3. I claim complete exemption from withholding (I CERTIFY that the number of withholding exemptions clawithholding, I certify that I incurred no liability for Wiscon Signature 	entitled educted (see inst aimed on sin incom	to claim an exem (if your employer rructions). Enter this certificate doe te tax for last year	agrees)	1 • 0 • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • •

Enter your IAM and password and click OK.

Windows Security	<u> </u>
The server even is asking for your user name and pass The server reports that it is from PeopleSoft Enterprise PeopleTool	vord. s.
smithjabcd	
ОК	Cancel

If a warning popup message appears, click OK. The form will continue processing normally.

Warning: JavaScript Window -						
Cannot retrieve Submit button from a report template						
	ОК					



A confirmation page will appear with a copy of your completed form. You may print/save a copy for your records.

The changes you have made to your Employee Withholding Allowance Certificate have been successfully submitted to payroll on 2022-06-29. You can scroll to the next page to view your saved data or print/save a copy of this document for your records. If you received a message indicating JAVA was unable to retrieve the Submit button from a report template and you are an Acrobat Pro user, you can disregard the warning. Your changes have been saved. Please be advised when you close this document the original PDF document remains open for your reference. To exit the application process, you will need to close both the original and the updated PDF documents. If you need to make additional changes, you must navigate back to the Tax Withholding Forms page and begin the process again.

Return to Employee Self Service and click on *Tax Withholding* to refresh page.



View updated tax withholdings.

Tax With	holding					
Company	State of Wisconsin					
Status	Active					
Form Type	Jurisdiction			Withholding Details		
Federal	Federal	Tax Status	Single	Dependent Amount	0.00	
		Other Income	0.00	Deductions	0.00	>
		Extra Withholding	0.00	Other		
State	Wisconsin	Tax Status	Married	Withholding Allowances	1	
		Additional Amount	0.00	Additional Allowances		>
		Additional Percentage		Other		



Out-of-State Taxes

The system only allows state tax updates for employees living in Wisconsin. If you live and/or work in any other state, you will need to submit the appropriate tax form(s) to your agency payroll specialist.

Additional Resources

For more information on the new Federal W-4 form, please refer to the following IRS pages:

- FAQs on Form W-4
- IRS Tax Withholding Estimator

If you have further questions about any of the topics presented in this Job Aid, additional resources are available on the <u>ESS Job Aids</u> page.