Quick Reference Guide: Updating Withholding Elections (W-4)

Keep in Mind

- Federal withholdings can be updated electronically in Workday. State withholdings must be updated by uploading a state W-4 within your Workday profile under the Documents section.
- This Quick Reference Guide covers both activities.
- You may update your withholding elections at any time.

Information Needed

- Effective date
- Marital status
- Desired federal withholding elections
- If filing in Illinois, the IL State W-4: http://finserv.uchicago.edu/payroll/forms/IL-W-4.pdf

Steps for updated federal withholdings:

1. From the Home page, click on the Pay worklet.

2. Under the Actions header, click Withholding Elections.
3. From the Withholding Elections page, you can view and update (if applicable) the following elections:

- Federal Elections (W-4)
- Local Elections
- Tax Allocations
- State Elections

4. To update Federal Elections (W-4), click the Update icon.
5. On the Complete Federal Elections screen, review the help text and enter an **Effective Date**. The effective date cannot be in the past.

6. Click **OK**.

7. Review the help text and then scroll down to the W-4 Data section. Complete the Federal W-4 form by updating the following where applicable:
   - Last Name Differs from Social Security Card – check this box if your last name differs from that shown on your Social Security Card
   - Nonresident Alien checkbox – check this box if applicable
   - Marital Status – use the prompt icon to select your marital status.
   - Allowances – number of allowances you are claiming (*from applicable W-4 worksheet*)
   - Additional Amount – additional amount, if any, you want withheld from each paycheck
   - Exemption Status – check this box if applicable

8. Click the **I Agree** checkbox.
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9. Click OK.

10. You will see that this task has been successfully completed.
Steps for updating state withholdings:

1. From the Home page, navigate to the circle to the right of your name in the upper right hand corner of the page. Click the circle and then click on View Profile.

2. From your Worker Profile, click on the Personal tab and then select Documents tab.

3. Click the Add icon.
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4. Click the **Attachments** icon , to add the attachment of your **State W-4**.

5. Once attached, use the search prompt to select the **Document Category** of **W4 State Form**. Enter a comment if you would like, however no comment is necessary. Click **OK**.

6. The next screen will display your document as uploaded. You may add additional documents and edit or delete documents you have uploaded here as necessary.

7. Payroll Services will be notified once a **W-4 State Form** is uploaded and will edit your state withholding elections accordingly (please allow five business days for the updates to take effect). To view your state withholding elections, navigate back to your home page, select the **Pay worklet**, and select **Withholding Elections**. Your **State Elections** will be listed under the second tab.