

Quick Reference Guide: *Updating Withholding Elections (W-4)***Keep in Mind**

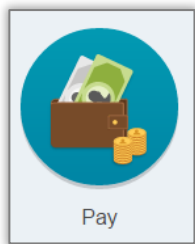
- Federal withholdings can be updated electronically in Workday.
- This Quick Reference Guide covers both activities.
- You may update your withholding elections at any time.

Information Needed

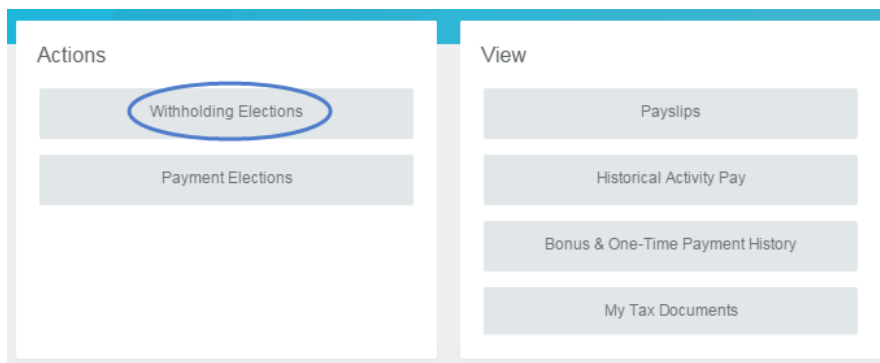
- State and Local Withholdings can be updated electronically in Workday.
- This Quick Reference Guide covers both activities
- You may need to reference the individual state form on your state or local website.

Steps for updated federal withholdings:

1. From the **Home Page**, click on the **Pay worklet**.



2. Under the **Actions** header, click **Withholding Elections**.



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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**

Withholding Elections Logan McNeil

Home Address 1234 Main Street
Chicago, IL 60618
United States of America

Social Security Number

Federal Elections | State Elections | Local Elections | Tax Allocations

4. To update Federal Elections (W-4), click the **Update** icon.

Federal Elections | State Elections | Local Elections | Tax Allocations

Company University of Chicago

Effective Date 06/22/2015

Lock In Letter

Payroll Withholding Status Married

Number of Allowances 1

Additional Amount 0.00

Exempt

Nonresident Alien

Last Name Differs from SS

Last Updated 06/24/2015 12:24:57.886 PM

Last Updated By Logan McNeil

Update

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5. On the Complete Federal Elections screen, review the help text and enter an **Effective Date**. The effective date cannot be in the past. When complete, click **OK**.

Complete Federal Elections

If you are a nonresident alien for taxation purposes, please check the "Nonresident Alien" box below. You will not be able to select an option if you are determined to be a nonresident for tax purposes. Please note that if you are determined to be a nonresident for tax purposes, we will review your information to make a correct tax determination. Please note that if you are determined to be a nonresident for tax purposes, we will review your information to make a correct tax determination. Please note that if you are determined to be a nonresident for tax purposes, we will review your information to make a correct tax determination.


For more information, please click on this link: [Supplemental Form W-4 Instructions For Non Resident Aliens \(Notice 1392\)](#).

Worker **Logan McNeil**

Company *

Effective Date *

OK Cancel

6. 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:
- Nonresident Alien checkbox – check this box if applicable
 - Last Name Differs from Social Security Card – check this box if your last name differs from that shown on your Social Security Card
 - 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

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W-4 Data

[View Blank Form](#)

Nonresident Alien

If you are a nonresident alien, see Notice 1392, Supplemental Form W-4 Instructions for Nonresident Aliens, before completing this form.

Last Name Differs from SS

If your last name differs from that shown on your social security card, check here.
You must call 1-800-772-1213 for a replacement card.

Marital Status *

If married, but legally separated, or spouse is a nonresident alien, choose "Single".

Number of Allowances

Total number of allowances you are claiming (from the applicable worksheet on the Form W-4 instructions).

Additional Amount

Additional amount, if any, you want withheld from each paycheck

Exempt

I claim exemption from withholding for 2015 and I certify that I meet both of the following conditions for exemption.
* Last year I had a right to a refund of all federal income tax withheld because I had no tax liability and
* This year I expect a refund of all federal income tax withheld because I expect to have no tax liability.
If you meet both conditions, click the Exempt Box.

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, you declare that you have examined this certificate and to the best of your knowledge and belief, it 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, please contact your Payroll Department for a paper copy of the form.
The form is not valid without a signature.

I Agree *

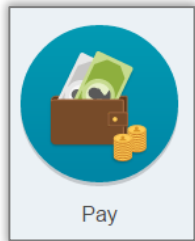
[OK](#) [Cancel](#)

7. Click the **I Agree** checkbox, then click **OK** to successfully complete the task.

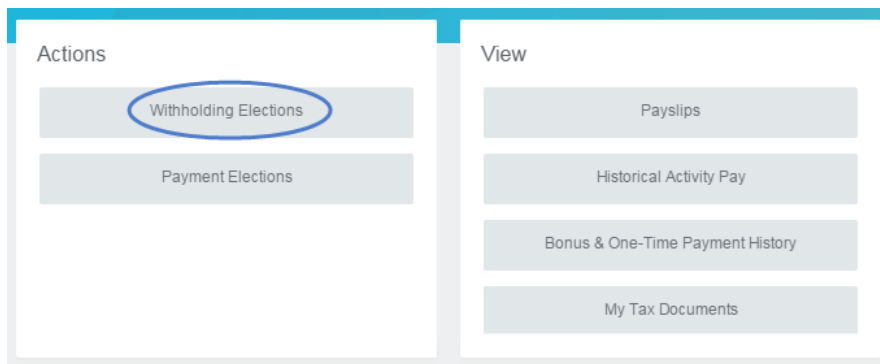


Quick Reference Guide: *Updating Withholding Elections (W-4)***Steps for updating State and Local Withholdings:**

1. From the **Home Page**, click on the **Pay worklet**.



2. Under the **Actions** header, click **Withholding Elections**.



3. Click on the second tab for **State Elections**, Click on **Update** icon

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Withholding Elections Donald Draper

Home Address (empty)

Federal Elections **State Elections** Local Elections

Home State (empty)

Work State Illinois

Company University of Chicago

No Tax Elections

Update

4. On the Complete State and Local Withholding screen, **review the help text**, choose your **Work State**, **Withholding Form Type**, and enter an **Effective Date**. The effective date cannot be in the past. When complete, click **OK**.

Complete State and Local Withholding Elections

Please note your state and local withholding is only valid for the state and municipality of your work location.

- If you work in a state listed in the drop-down menu below, you can elect withholding for your work.
- If you work in Illinois, but are claiming a reciprocal agreement with Michigan or Wisconsin, please need to complete an IL-W-5-NR to stop Illinois state tax withholding. Your home address must also be in that state.
- If you work in Illinois, Payroll is required to withhold Illinois State withholding. Please note: the University of Chicago does not withhold for Illinois State.

Worker	Donald Draper
Company *	<input type="text" value="X University of Chicago"/>
Effective Date *	<input type="text" value="12 / 27 / 2016"/>
State *	<input type="text" value="X Illinois"/>
Withholding Form Type *	<input type="text" value="X IL-W-4 - Withholding"/>

5. Complete your state withholding allowances and Click the **I Agree** checkbox, then click **OK** to successfully complete the task.

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Illinois IL-W-4 Data

[View Blank Form](#)Basic Allowances Additional Allowance Additional Amount Exempt

LEGAL NOTICE

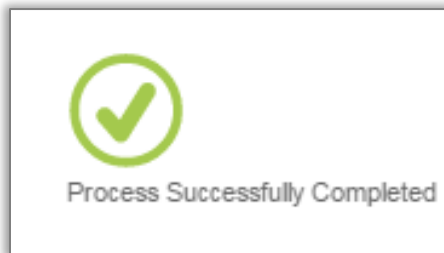
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1. Under penalties of perjury, you declare that you have examined this certificate and to the best of your knowledge and belief, it is true, correct, and complete.
2. You understand that your payroll tax withholding election is a legal and binding 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, please contact your Payroll Department for a paper copy of the form.

The form is not valid without a signature.

I certify that I am entitled to the number of withholding allowances claimed on this certificate.

I Agree 

Your **State Elections** will be listed under the second tab.