

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

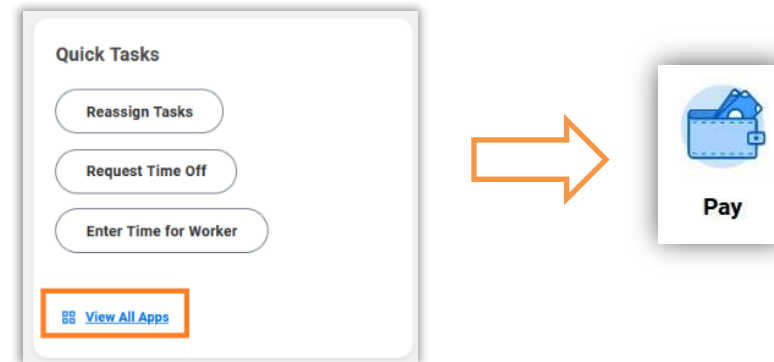
- Federal and state withholdings can be updated electronically in Workday. This Quick Reference Guide covers both activities.
- You may update your withholding elections at any time.

**Information Needed**

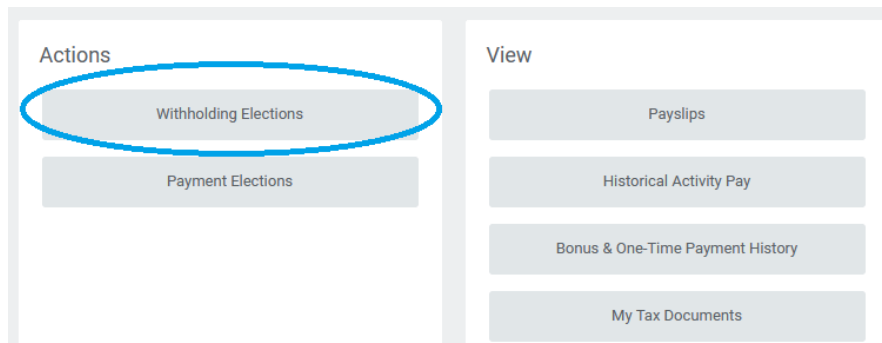
- Effective date
- Marital status
- Desired federal withholding elections
- If filing in Illinois, the IL State W-4:  
<http://finserv.uchicago.edu/payroll/forms/IL-W-4.pdf>

**Steps for updated federal withholdings:**

1. From the **Home Page**, click on the **View All Apps** link (in the Quick Tasks section.) Click on the **Pay** app.



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**

**State Elections** (not applicable to all states)

**Local Elections** (not applicable to all localities)

**Tax Allocations** (do not edit unless specifically instructed)

### Withholding Elections

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**Home Address** Chicago, IL 60608  
United States of America

**Social Security Number** XXX-XX-XXXX

[Federal Elections](#)   [State Elections](#)   [Local Elections](#)   [Tax Allocations](#)

4. To update Federal Elections (your federal W-4), click the **Update** button.
5. On the next screen, ensure the **Company** field is set to **University of Chicago** and the **Effective Date** is today. Please do not use an effective date in the past. Click **OK**.

[Federal Elections](#)   [State Elections](#)   [Local Elections](#)   [Tax Allocations](#)

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**Company** University of Chicago

**Effective Date**

**Lock In Letter**

**Payroll Withholding Status** Single

**Number of Allowances** 0

**Additional Amount** 0.00

**Exempt**

**Nonresident Alien**

**Last Name Differs from SS**


**Last Updated** 12/13/2014 08:35:57.920 AM

**Last Updated By** (empty)

**Update**

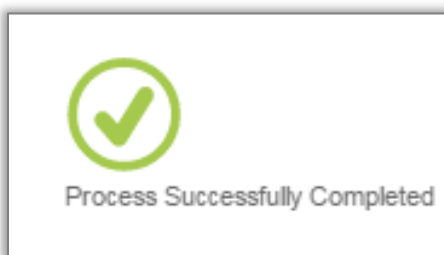
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6. Review the help text and then scroll down to the W-4 Data section. Complete the Federal W-4 form by updating the following where applicable:

- Marital Status – use the **Prompt Icon**  to select your marital status. This field is required.
- Multiple Jobs or Spouse Works
- Number of Qualifying Children Under Age 17
- Number of Other Dependents
- Override Total Dependent Amount
- Other Income (not from jobs)
- Deductions
- Extra Withholding – additional amount, if any, you want withheld from each paycheck
- Exempt – check this box if applicable
- Nonresident Alien checkbox – check this box if applicable

(Please note that the fields and available values on the federal W-4 are subject to change by the federal government. If there has been a recent change in the federal W-4, the fields above may not be accurate. Please reach out to the Payroll department if you have questions.)

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 Withholdings:**

1. Follow steps 1-3 above to reach the Withholding Elections screen, then select the **State Elections** tab. Click the **Update** button at the bottom of the page to change your withholding elections. You may need to scroll down.
2. On the next screen, ensure the **Company** field is set to **University of Chicago** and the **Effective Date** is today. Please do not use an effective date in the past.
3. Carefully review the help text, and then select the **State** where you would like to complete withholding elections, and (if applicable) the **Withholding Form Type**. Not all states offer tax withholding, and not all states have multiple withholding form types. Click **OK** to proceed.
4. The fields and values that appear on the next screen will depend on the selections made in the previous step. If you are unsure how to fill out the withholding form, you can click the **View Blank Form** button for a PDF copy of the paper version of the form, or contact the Payroll department.
5. Click the **I Agree** checkbox, then click **OK** to successfully complete the task.

**Withholding Elections**

Home Address	Chicago, IL 60608 United States of America		
Social Security Number	XXX-XX-XXXX		
Federal Elections	<b>State Elections</b>	Local Elections	Tax Allocations

