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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![Pay worklet screenshot](image-url)
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. When complete, click **OK**.

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

- If you work in Illinois, Payroll is required to withhold Illinois State withholding. Please note: the University of Chicago does not have an address in the city of Chicago.

<table>
<thead>
<tr>
<th>Worker</th>
<th>Donald Draper</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company</td>
<td>University of Chicago</td>
</tr>
<tr>
<td>Effective Date</td>
<td>12/27/2016</td>
</tr>
<tr>
<td>State</td>
<td>Illinois</td>
</tr>
<tr>
<td>Withholding Form Type</td>
<td>IL-W-4 - Withholding</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Allowance</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic Allowances</td>
<td>0</td>
</tr>
<tr>
<td>Additional Allowance</td>
<td>0</td>
</tr>
<tr>
<td>Additional Amount</td>
<td>0.00</td>
</tr>
<tr>
<td>Exempt</td>
<td></td>
</tr>
</tbody>
</table>

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

I Agree ✗ [ ]

Process Successfully Completed

Your State Elections will be listed under the second tab.