

Edit Your W-4

Overview

This job aid outlines the steps for an Employee to edit their Federal Tax Election Form W-4 in Workday

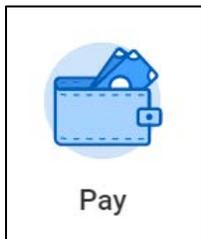
Important Information:

- Log on to [Single Sign-On](#) (TAMUS-SSO) using your UIN (employee ID, not your student ID) and password and select [Workday](#) from the SSO Menu.
 - First time users can select the “New Employees – Set up your password” link on the home screen to establish a password.
 - For existing users who have forgotten their password, the “I forgot my password” link will guide you through the process of establishing a new password.

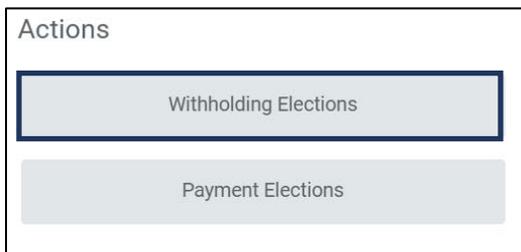
Steps

From the Workday Home page:

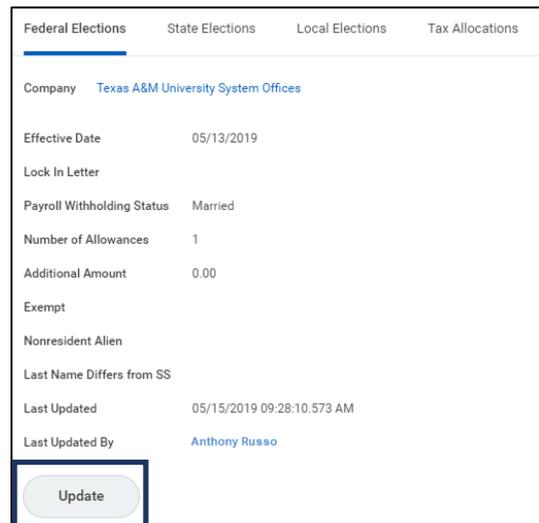
1. Click the **Pay** worklet



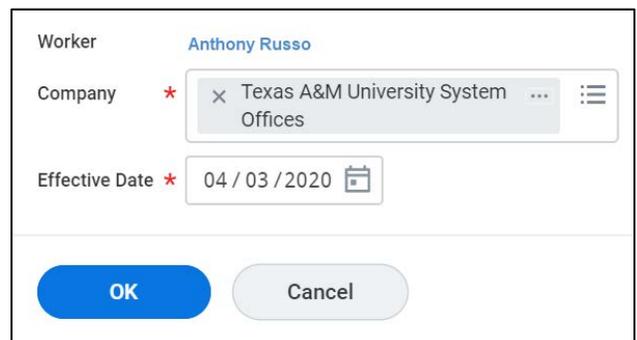
2. Under Actions, click **Withholding Elections**



3. Click on the **Update** button at the bottom of the page



4. Confirm your **Company** and **Effective Date**, then click **OK**



IMPORTANT: Any changes you submit will take effect on your NEXT pay date,

provided payroll for that pay date has not already been processed

- On the W-4 Data page, you may select the **View Blank Form** button if you want to obtain a blank copy of the IRS Form W-4

- Select your Marital Status from the options provided:

- Head of Household.** Select only if you are unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual
- Married filing jointly (or Qualifying widow(er)).** Select if you are married and will be filing with your spouse on the same tax return or if you have been widowed for two years or less and have a dependent child
- Single or Married filing separately.** Select if you are single or if you and your spouse will be filing separate tax returns

- Check the **Multiple Jobs or Spouse Works** box if:

- You hold more than one job at a time *OR*
- You are married filing jointly and your spouse also works

Note: The correct amount of withholding depends on income earned from all jobs

- In the Claim Dependents section, enter the following information as needed:

- Number of Qualifying Children Under Age 17.** The number you enter here is multiplied by 2,000.00 to automatically populate the field **Total Amount for Qualifying Children**
- Number of Other Dependents.** The number you enter here is multiplied by 500.00 to automatically populate the field **Total Amount for Other Dependents**. The **Calculated Total Dependent Amount** will then reflect the sum of the **Total Amount for Qualifying Children** and the **Total Amount for Other Dependents**
- Override Total Dependent Amount.** Enter an amount if you want to change the **Calculated Total Dependent Amount**

- In the Other Adjustments (optional) section, enter the following information as needed:

- Other Income (not from jobs).** Enter an amount if you want tax withheld for other income you expect this year that won't have a

withholding. This may include interest, dividends and retirement income

- **Deductions.** If you expect to claim deductions other than the standard deduction and want to reduce your withholdings use the worksheet on page 3 of the instructions for completing the IRS Form W-4 2020 and enter the result here
- **Extra Withholding.** Enter any additional tax you want withheld each pay period

Other Adjustments (optional)

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.

Deductions

If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use "view blank form" Deductions Worksheet on page 3 and enter the result.

Extra Withholding

10. Check the **Exempt** box *if* you had no federal income tax liability in the previous year and you expect to have no federal income tax liability in the current year

Note: By checking the Exempt box no federal income tax will be withheld

11. Check the **Nonresident Alien** box if you are a nonresident alien

12. Check the **I Agree** box and then **OK**

Exempt

You had no federal income tax liability in 2019 and you expect to have no federal income tax liability in 2020.
Note: By checking the Exempt box you will have no federal taxes withheld.

Nonresident Alien

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

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, I declare that this certificate, to the best of my knowledge and belief, 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, click "View Blank Form" icon above to print a paper copy of the form.
The form is not valid without a signature.

I Agree *

OK **Cancel**

This completes the steps to **Edit Your W-4 in Workday**