

Federal Tax Election Update in Workday

Employee instructions to Enter or Update a Federal Withholding Election in Workday.

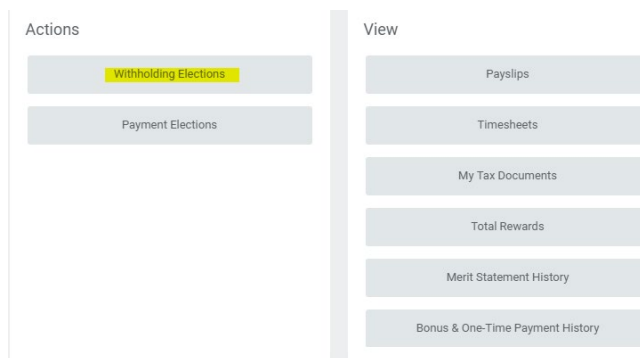
Effective January 1, 2020 the new IRS Form W-4 (2020), must be used. **You no longer have the option to enter allowances.** You now have the options to claim dependents, enter other income and/or enter deductions you will be able to claim at year-end.

1. Log into Workday
2. Click the Pay Worklet



Pay

3. Click Withholding Elections



4. Under the Federal Elections tab, click the “Update” button at the bottom of the page.

A screenshot of the 'Withholding Elections' form in Workday. The form is titled 'Withholding Elections' and has a blue header. Below the header, there are tabs for 'Federal Elections', 'State Elections', 'Local Elections', and 'Tax Allocations'. The 'Federal Elections' tab is selected. The form displays the following information: Company: Texas A&M University; Effective Date: 01/22/2018; Lock In Letter: (blank); Payroll Withholding Status: Married; Number of Allowances: 0; Additional Amount: 0.00; Exempt: (blank); Nonresident Alien: (blank); Last Name Differs from SS: (blank); Last Updated: 01/22/2018 05:10:14.380 PM; Last Updated By: (blank). At the bottom of the form, there is an 'Update' button with a blue arrow pointing to it.

5. Verify your name and company, **DO NOT** change the Effective date, click OK

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6. Make your changes in the W-4 Data box

Note 1: If you put an amount in the Additional Amount field, that amount will be deducted from each paycheck in addition to your regular federal tax deduction. It will also deduct if you do not have a regular federal tax deduction.

Note 2: DO NOT check the Nonresident Alien Box; that box will be checked by Tax Compliance & Reporting, if necessary.

For help on completing this section, please visit <https://www.irs.gov/pub/irs-pdf/fw4.pdf> and <https://www.irs.gov/newsroom/faqs-on-the-2020-form-w-4>.

W-4 Data

[View Blank Form](#)

By filling out the information below, you are completing the Employee's Withholding Certificate (Form W-4) which affects how much federal income tax is withheld from your pay. You should review this current form and any accompanying instructions before filling out the information below. You should also consider reviewing your state withholding elections at this time, as submitting this form may affect your state withholding in some states.

Marital Status Married

Multiple Jobs or Spouse Works

Do only one of the following:
(a) Use the estimator at www.irs.gov/W4App for most accurate withholding; or
(b) Use the Multiple-Jobs Worksheet on "view blank form" page 3 and enter the result in line Step 4(c) "Extra Withholding" below for roughly accurate withholding; or
(c) If there are only two jobs total, you may check the box above. Do the same on Form W-4 for the other job. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld.

TIP: To be accurate, submit a 2020 Form W-4 for all other jobs. If you (or your spouse) have self-employment income, including as an independent contractor, use the estimator.

Claim Dependents
If your income will be \$200,000 or less (\$400,000 or less if married filing jointly):

Number of Qualifying Children Under Age 17

Total Amount for Qualifying Children

Number of Dependents

Total Amount for Dependents

Calculated Total Dependent Amount

Override Total Dependent Amount

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

Enter any additional tax you want withheld each pay period.

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:

- Under penalties of perjury I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.
- You understand that your payroll tax withholding election is a legal and binding transaction.
- 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

These selections are all optional.

7. Click OK - You have completed your Federal Tax Election Entry.