

# View/Edit W4 Tax Information

This job aid provides instructions on how to review and update your federal tax withholding elections within the self-service module of PeopleSoft HCM. **IMPORTANT! As of Jan. 1, 2020, only federal W-4 Tax Information** can be updated through Self Service. Due to reporting requirements, the appropriate state [form](#) must be submitted to the Payroll Department for changes to state withholding.

1. Log into [PeopleSoft HCM](#) with your six-digit Employee ID number and password. Select **Payroll & Compensation**.
2. Select **W-4 Tax Information**.  
**Note:** It may take a moment for the page to load.
3. Select appropriate **Filing Status** in **Step 1: Personal Information**.
4. If applicable, select appropriate option in **Step 2: Multiple Jobs or Spouse Works**.
5. If applicable, complete **Step 3: Claim Dependents** to claim tax credits for dependents. **Note:** These boxes must be dollar amounts only.
6. If applicable, complete **Step 4: Other Adjustments** to add additional income, itemized deductions, and/or extra tax withholdings. **Note:** These boxes must be dollar amounts only.
7. If applicable, complete **Claim Exemption from Withholding**.
8. Click **Submit** when finished.
9. Enter PeopleSoft **password** on **Verify Identity** page. Click **Continue**.
10. Click **OK**.  
**Note:** The effective date of the transaction will be the date you submitted changes.

**W-4 Withholding Certificate**

Leslie Doe  
San Diego Unified School Distr

Social Security Number 888-22-3333

Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Your withholding is subject to review by the IRS [www.irs.gov](#).

**Step 1: Personal Information**

Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to [www.ssa.gov](#).

**Address**

1234 Whirlybird Way  
San Diego 92110-5525

**Filing Status** **3**

☐ Single or Married filing separately  
☒ Married filing jointly (or Qualifying widow(er))  
☐ Head of Household (Check only if you are unmarried and pay more than half the cost of keeping up a home for yourself and a qualifying individual).

Complete Steps 2 through 4 ONLY if they apply to you. To see if you are exempt from withholding or you have concerns about your privacy, see instructions for Form W-4 on the IRS website.

**Step 2: Multiple Jobs or Spouse Works** **4**

Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all these jobs.

[View Instructions](#)  
☐ Multiple Jobs or Spouse Works [Click View Instructions link for details.](#)

Complete Steps 3 through 4(b) on Form W-4 for only one of these jobs. Leave those steps blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3 through 4(b) on the Form W-4 for the highest paying job.)

**Step 3: Claim Dependents** **5**

[View Instructions](#)

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

Multiply the number of qualifying children under age 17 by \$2,000   
Multiply the number of other dependents by \$500   
Other tax credits   
Total

**Step 4: Other Adjustments** **6**

[View Instructions](#)

(a) Other Income   
(b) Deductions   
(c) Extra Withholding

**Claim Exemption from Withholding**

I claim exemption from withholding for the year  and I certify that I meet BOTH of the following conditions for exemption from withholding:

- Last year I owed no federal income tax.
- This year I expect to owe no federal income tax.

☐ Check this box if you meet both conditions to claim exemption from tax withholding

Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete.

**Submit**

**Verify Identity** **9**

To protect your privacy, verify your identity by typing your password. If you are not this user, click Cancel.

User ID: 198876  
Password:

**Continue** **Cancel**

**Submit Confirmation** **10**

☒ The Submit was successful.  
However, due to timing, your change may not be reflected on the next paycheck.

**OK**