



Employee Self Service: W-4 Information

Purpose: This document describes the key points in reviewing and changing your W-4 Tax Information in PeopleSoft Employee Self Service (ESS).

Topics Covered:

- [View and edit W-4 tax information](#) (pg. 2).
- [View and edit exemption claiming information](#) (pg. 4).

PeopleSoft 8.9	Key Changes
	<p> There are no changes to the Self Service W-4 Tax Information page.</p> <p>For more information about the changes and new features in PeopleSoft 8.9, check out the Self Service page on HARVie http://harvie.harvard.edu/ess/selfservice/. There you will find online courses, work instructions, and more.</p>

Business Rules

Special Federal withholding status Certain Harvard employees will not be able to use ESS to update their W-4 tax information. For example, Non-Resident Alien employees will see the following message if they attempt any changes:

"You are ineligible to modify your tax setup via Employee Self Service due to your Non-Resident Alien status or IRS limitations. If your status has changed, or need further assistance in this matter, please contact University Financial Services."


Claiming more than ten (10) allowances If you claim more than ten allowances, you will receive a warning message that states:
"Federal Withholding allowance is greater than 10. This information will be sent to the IRS. Leave as is, or change the number of Federal Withholding allowances."

If you are eligible to claim more than 10 allowances, click OK to update the change. If entered in incorrect number, re-enter the page and correct your allowances.

Claiming Exemptions You cannot use ESS to claim exemption from State (MA) withholdings. To claim exemption from State (MA) withholding, you must submit a state form to Central Payroll.

 This form can be found on the ABLE website (www.able.harvard.edu; click the forms link to search) or online www.dor.state.ma.us.

View and Edit W-4 Tax Information

 **Navigation:** Access the W-4 Tax Information page by selecting the following path: [Self Service> Payroll and Compensation> W-4 Tax Information:](#)

Patrick Smith Social Security #: 012-34-5678
Harvard University

You must complete Form W-4 so the Payroll Department can calculate the correct amount of tax to withhold from your pay. Federal income tax is withheld from your wages based on marital status and the number of allowances claimed on this form. You may also specify that an additional dollar amount be withheld. You can file a new Form W-4 anytime your tax situation changes and you choose to have more, or less, tax withheld.

Whether you are entitled to claim a certain number of allowances or exemption from withholding is subject to review by the IRS. Your employer may be required to send a copy of this form to the IRS.

(A) **Review Tax Address**
654 Anywhere Street
Apartment # 321
Boston MA 02115

(B) **W-4 Tax Data**
Enter total number of Allowances you are claiming:



(C) Enter Additional Amount, if any, you want withheld from each paycheck

Indicate Marital Status: Single If married, but withholding at single rate, select
Single status and check here.
 Married

If your last name differs from that shown on your social security card, check here.
You must call 1-800-772-1213 for a new card.

Do you want to write above changes to your MASSACHUSETTS State Tax Record?

Page Summary: On this portion of the page, view your tax address, and view or edit your W-4 data.

Section	Field/Table	Data Req.	Description/Additional Information
A	Review Tax Address	Auto-fill	The tax address corresponds to your home address.  Tip: If your address is incorrect, you may change it in ESS on the Home and University Mailing Address page Self Service> Personal Information> Home & University Mail Address .
B	W-4 Tax Data: Allowances	Yes	Enter the total number of allowances that you are claiming.  Note: If you exceed 10 allowances, you will be prompted with a warning message to confirm you are eligible for taking more than 10 allowances.
C	W-4 Tax Data: Additional Withholding Amount	No	If you want to withhold an additional amount of taxes from your paycheck, enter the amount <u>you want withheld from each paycheck</u> . See scenarios below:

Scenario 1: In viewing her paycheck, Jill Smith sees that \$302.00 is being withheld in Federal taxes from each of her paychecks. She would like to increase the amount withheld on each paycheck by an additional \$50.00 (for a total of \$352.00 Federal taxes withheld on each paycheck). To do this, Jill enters 50.00 in **Additional Amount Withheld** field. For Jill, a bi-weekly (26 pay periods) employee, this would be an additional amount of \$1,300.00 of Federal taxes being withheld over a year period

Scenario 2: Tom already has an additional amount of \$25.00 Federal taxes withheld from each paycheck and wants to increase the amount to \$50. Tom would enter \$50.00 in the **Additional Amount Withheld** field.

Tax Information Page (con't)

W-4 Tax Data

Enter total number of Allowances you are claiming:




Enter Additional Amount, if any, you want withheld from each paycheck


D Indicate Marital Status: Single If married, but withholding at single rate, select
Single status and check here.

Married

E If your last name differs from that shown on your social security card, check here.
You must call 1-800-772-1213 for a new card.

F Do you want to write above changes to your MASSACHUSETTS State Tax Record?

Section	Field/Table	Data Req.	Description/Additional Information
D	Marital Status	Yes	Select the appropriate radio button.  Note: If you select "...married, but withholding at single rate..." be sure to also click the "Single" radio button. If you do not select "Single" and then elect to have your federal changes apply to Massachusetts, the state elections will default to "Married."
E	Name Differing from Social Security Card	No	If your name needs to be changed on your social security card, obtain a card with your new name and provide a copy to Central Payroll as soon as possible, so that the information on your Form W-2 is correct.
F	Write Change to MA	No	Check this box if you want your Federal elections to mirror your state (MA only) elections.  Note: If you want to make changes to your state (MA only) elections, <u>but the changes are not the same as your Federal</u> , you must submit and send a completed hard copy of the MA M4 to Central Payroll.  Note: Your federal withholding changes will be saved <u>only</u> if you select "Yes" when prompted.


 **Note:** If you choose to have your Federal Withholding changes written to your Massachusetts tax record, but you do not actually *have* a Massachusetts state record, you will see the following message. Your federal withholding changes will be saved only if you select "Yes."

Mass Tax Error (28200,7)

You have chosen to have your Federal Withholding Changes written to your Massachusetts Tax Record.

You do not currently have a Massachusetts Tax Record.
NO CHANGES TO STATE TAX RECORDS will be made.

Please contact your local HR/Payroll office or Central Payroll for further assistance.
Click Yes to Continue.

 **Note – Special State (MA) Withholding Status:** If you have a special state (MA) withholding status, and you attempt to have your Federal withholding changes written to your MA tax record, you will receive the below error message. Click “Yes” to save your Federal withholding changes:

Mass Tax Warning. (28200,18)

You have chosen to have your Federal Withholding Changes written to your Massachusetts Tax Record.

You are ineligible to modify your STATE tax setup via Employee Self Service due to your Non-Resident Alien status or IRS limitations. If your status has changed, or you need further assistance in this matter, please contact Central Payroll or Tax Services.

NO CHANGES TO STATE TAX RECORDS will be made.

Click Yes to Continue.

View and Edit Exemption Claiming Information

Claim Exemption

(A) I claim exemption from withholding for and I certify that I meet **BOTH of the following conditions for exemption:**

>> Last year I had a right to a refund of ALL Federal income tax withheld because I had NO tax liability; AND

>> This year I expect a refund of ALL Federal income tax withheld because I expect to have NO tax liability.

If you meet both conditions, check 'Exempt' here:

Claiming exempt here will not update your State Tax Record. You must complete a state form and submit to Central Payroll. If you are currently claiming exempt and enter changes in the W-4 Tax Data section, those changes will not be saved if the exempt box remains checked.

(B) 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.

For more detailed instructions on how to update your information, please visit <http://able.harvard.edu/hr-ess/>

Page Summary: On this portion of the page, you can claim exempt from federal (not state) withholdings. This is also where you save any changes, by clicking .

Section	If	Then
A	You are going from <i>exempt</i> to <i>subject</i> ... If you are set up to be exempt from State (MA) and Federal withholding but no longer qualify as exempt...	Remove the check from the exempt checkbox and select “Apply to State (MA).” The system will update both State (MA) and Federal to reflect the new elections.
A	You are <i>subject for Federal</i> and <i>exempt for State(MA)</i> ... If you are making a change in your Federal elections from subject to exempt...	<u>Do not</u> select “Apply to State (MA).” f you select “Apply to State (MA),” the system will change Federal to exempt, and State (MA) will be changed from exempt to withholding at the highest rate (“Single” “0”).
B	You have completed editing the W-4 Tax Information Form...	Click “Submit.” Clicking this button bears the same weight as if you have physically signed a paper W-4.