## Step-by-Step Instructions

Zachry Business Use Case

Use the Tax Withholding section to make elections for Federal and State taxes. Payroll taxes are calculated using the employee's state of residency and work location. Work location is derived from job assignment.

- W-4 tax withholding information will be migrated from Cyborg to Oracle Cloud HCM for employees who submitted the information at time of hire or have updated their tax information prior to the Go-Live date.

- If not elected at hire, W-4 tax withholding status in Oracle will default to the highest tax level, **Single and 0** unless updated by the employee. Employees are responsible for updating their Federal and State tax withholdings prior to the first pay cycle of 2024.

- W-4s are recorded at the "person level" in Oracle so it applies to all the assignments underneath their Person Record. The employee will have the option to fill out a state tax form for each state they are working in.

- If an employee has multiple assignments in the same state, they only need to fill out one W-4. If an employee has multiple assignments in different states, they should check the W-4s for each state (if applicable in that state) and adjust as needed.

- Tax calculation could be impacted due to enhanced employee location tracking.

Employee Tax Election

Performed by: Employee

1. Navigate to **Homepage**, select the **Me** tab**.** Click the **Pay** icon in the App section.

ZACHRY
PROJECT MAVERICK
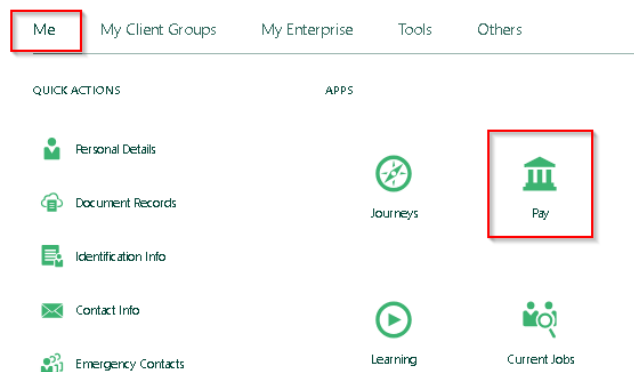
2. The following options appear. Select **Tax Withholding.**

My Payslips	Payment Methods	Year-End Documents	Tax Withholding
View, print, download and search current and past payslips, which contain gross pay, net pay, taxes and other information.	Define and prioritize salary payments details, such as payment type, payment amount and bank accounts details.	View, print, download and search year-end documents for current or prior tax years.	Go here to update your federal and state income tax withholding. Check this information when your personal or financial situation changes.

3. The below page appears. Select the **Edit** button (pencil icon) to edit *Federal Tax Elections*. To edit *Regional*, or *State Taxes*, skip to **Step 7**.

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Updates made to Tax Withholdings after 12:00 PM (CST) on Tuesdays may not be reflected until the following pay period payment.
*If you are unable to modify the options below, there is a tax lock in letter on your profile. Speak to your local payroll representative if you have questions.
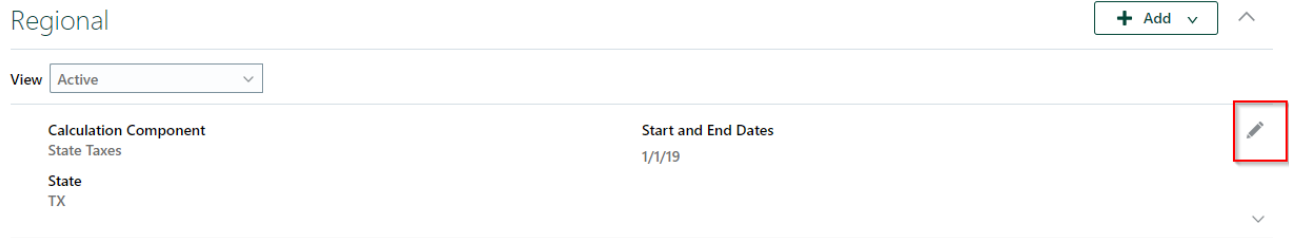
Federal

Calculation Component	Start and End Dates
Federal Taxes	3/25/19

Forms
Federal

Filing Status	Allowances
Single	0
	Additional Tax Amount

You may claim exemption from withholding if both of the following apply.
1. You had no federal income tax liability in the prior year.
2. You expect to have no federal income tax liability in the current year.
If you claim exempt, you will have no income tax withheld from your pay.

Exempt from Federal Income Tax

Regional

+ Add ∨

View Active

There's nothing here so far.

4. The below page appears. The employee can now edit their tax elections. The fields required are marked with asterisk (*). Once the employee is finished editing, check the **I agree** box. <u>*Note:*</u> Start change can only be current date and future dated.

a) The next two steps provide an explanation of the fields above.

5. Select **Save and Close.**

6. If you would like to view the actual form with information entered, click the hyperlink **Federal.**

7. To edit *Regional Tax* elections, the Employee selects the Edit button (pencil icon).

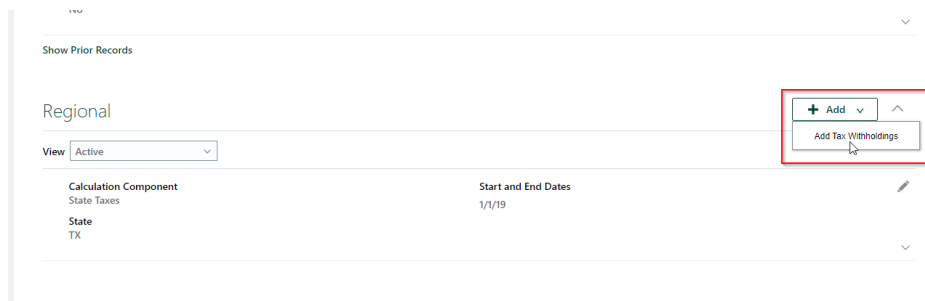*Note:* If an employee moves back and forth between different states for the system save the different Regional Taxes for each state.
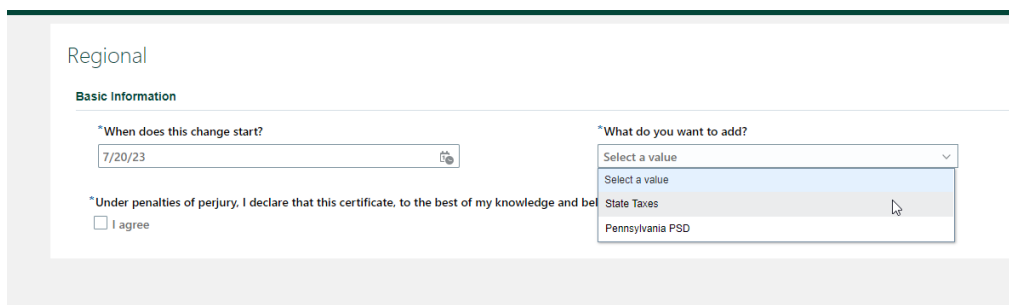
8. The below page appears. The employee can fill in the required fields and once completed, select **Save and Close** (top right).
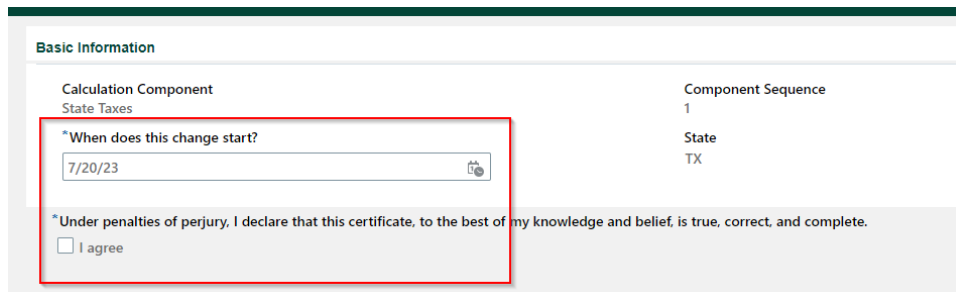
9. To add a new *Regional Tax Withholding*, select the **+Add** button and click **Add Tax Withholding**.

10. The below page appears. The employee selects an option from the *What do you want to add?* field.

11. Once selected, the **State** field appears. Select a state in the *State* field and check the *I agree* box. Once complete, the select **Save and Close** (top right).

12. The new *Regional Tax* information page appears. Enter tax information in the fields provided the check the *I agree*. Click **Save and Close**.

13. The Regional Tax section will display the newly added Tax Election.

14. To view the physical State Tax form, click on the **hyperlink below Form**.
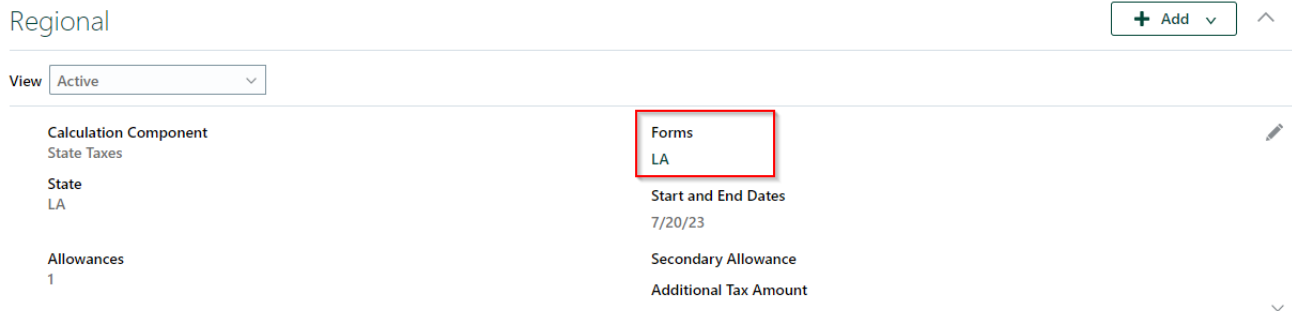
15. To view previous tax elections, select from the drop-down menu in the Regional Tax section next to **View**. Click Inactive.
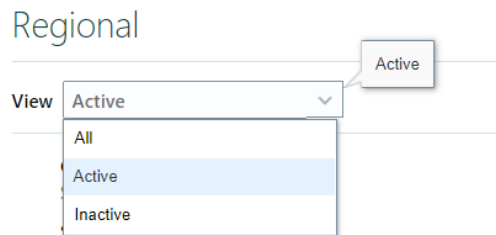
Note: Historical tax information will not be migrated over. The field above will remain empty until the current tax election information is archived.