

## Step-by-Step Instructions

### Zachry Business Use Case

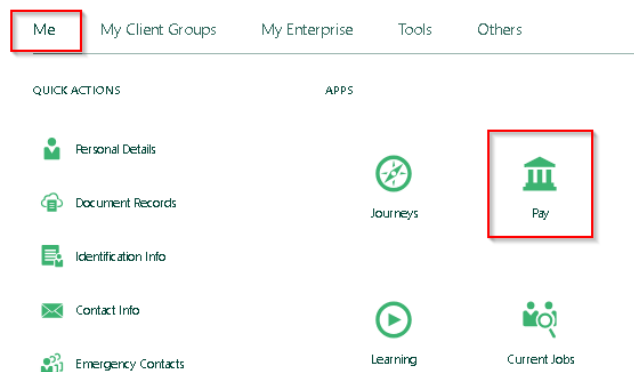
Use the Tax Withholding section to make elections for Federal and State taxes. Payroll taxes are calculated using the employee's state of residency and work location. Work location is derived from job assignment.

- 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.



2. The following options appear. Select **Tax Withholding**.

The screenshot shows a horizontal menu with four items: 'My Payslips', 'Payment Methods', 'Year-End Documents', and 'Tax Withholding'. The 'Tax Withholding' item is highlighted with a red rectangular border. Each item has a circular icon and a brief description of its function.

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

The screenshot shows the 'Federal' section of the tax election page. It contains a table with columns for 'Calculation Component', 'Forms', 'Filing Status', 'Start and End Dates', 'Allowances', and 'Additional Tax Amount'. A pencil icon in the top right corner is highlighted with a red box, indicating the edit button.

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

View



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. Note: Start change can only be current date and future dated.

**Basic Information**

Calculation Component  
Federal Taxes

Forms  
Federal

Component Sequence  
1

\*When does this change start?  
7/20/23

**Withholding Status**

\*Filing Status  
Head of household

Multiple Jobs  
No

Extra Withholding  
0 USD

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  
Select a value

Nonresident Alien  
No

Qualifying Dependents Amount  
2000 USD

Other Dependents Amount  
500 USD

Total Dependents Amount  
2500 USD

Other Income Amount  
0 USD

Deductions Amount  
0 USD

\*Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.  
 I agree

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

**Withholding Status**

\*Filing Status  
Select a value

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  
No

Nonresident Alien  
No

Qualifying Dependents Amount  
0 USD

Other Dependents Amount  
0 USD

\*Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.  
 I agree

Personal information that identifies you and indicates whether you plan to file your taxes as a single person, married person, or a head of household.

Number of qualifying children under age 17 multiplied by \$2,000.

Number of other dependents multiplied by \$500.

**Multiple Jobs**  
Select a value

**Extra Withholding**  
0.00 USD

**Total Dependents Amount**  
0 USD

**Other Income Amount**  
0 USD

**Deductions Amount**  
0 USD

I believe, is true, correct, and complete.

Any circumstances that indicate you should withhold more or less than the standard amount. A spouse's income, second job, or a freelance income

Optional section allows you to enter any additional tax you want withheld each pay period.

Total amount of qualifying dependents amount and other dependents amount.

Optional section allows you to withhold more on other income (not from jobs)

Optional section allows you to enter deductions other than the standard deduction and reduce your withholding.

## 5. Select **Save and Close**.

Save and Close Cancel

**Basic Information**

Calculation Component	Forms
Federal Taxes	Federal
Component Sequence	1
*When does this change start?	7/20/23

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

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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.

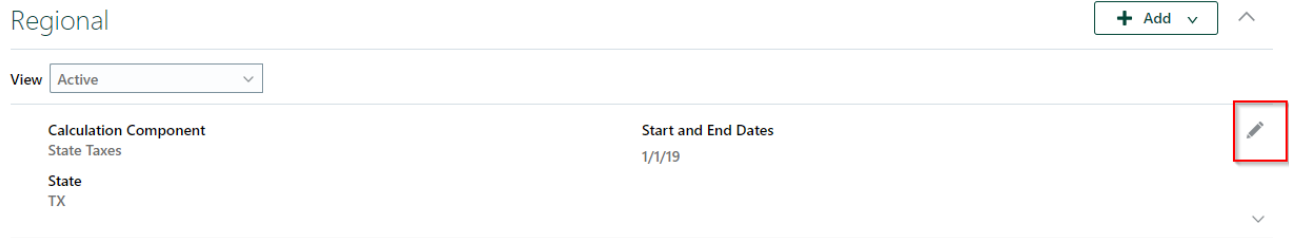
**Federal**

Calculation Component	Start and End Dates
Federal Taxes	3/25/19 - 7/19/23
<b>Forms</b>	
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.

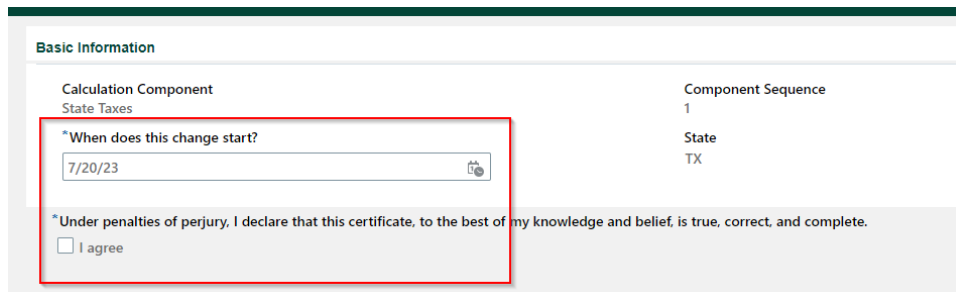
Exempt from Federal Income Tax

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

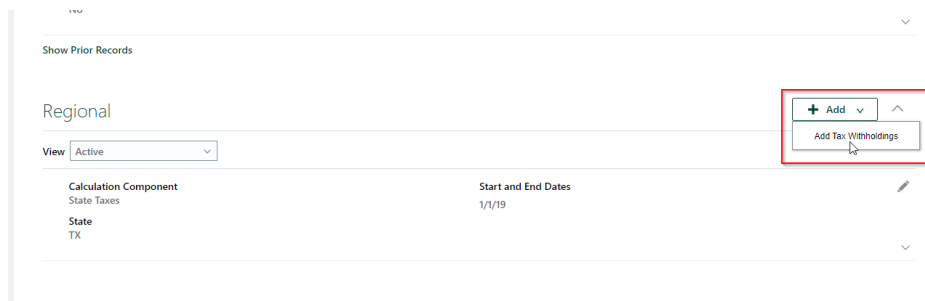


**Note:** If an employee moves back and forth between different states for the system save the different Regional Taxes for each state.

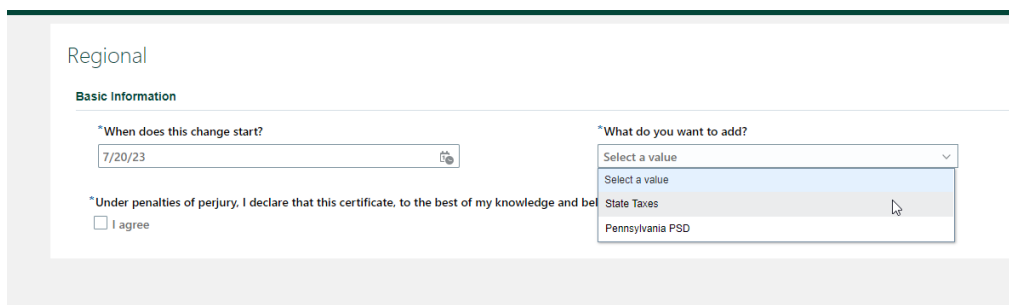
8. The below page appears. The employee can fill in the required fields and once completed, select **Save and Close** (top right).



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).

Regional + Add

Basic Information

\*When does this change start?  
7/20/23

\*What do you want to add?  
State Taxes

State  
LA

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

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

Regional + Add Save and Close

Basic Information

\*When does this change start?  
7/20/23

\*What do you want to add?  
State Taxes

State  
LA

State Tax Information

Allowances  
1

Additional Tax Amount  
USD

Secondary Allowance

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

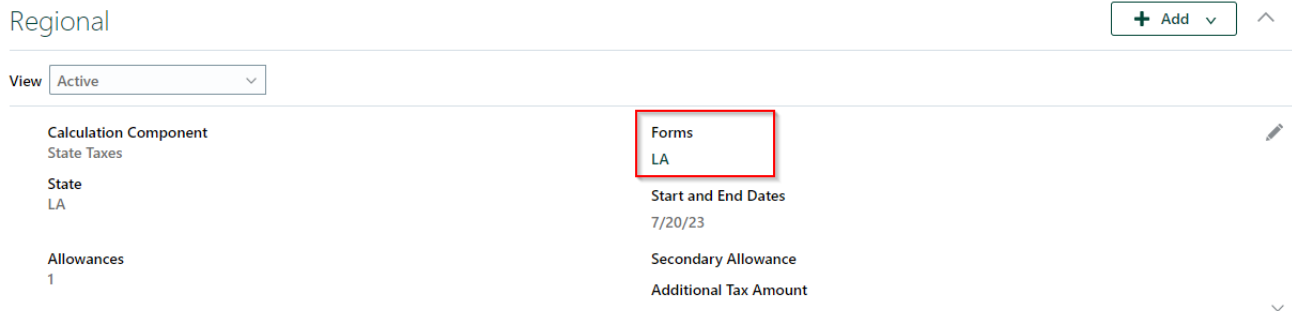
13. The Regional Tax section will display the newly added Tax Election.

Regional + Add

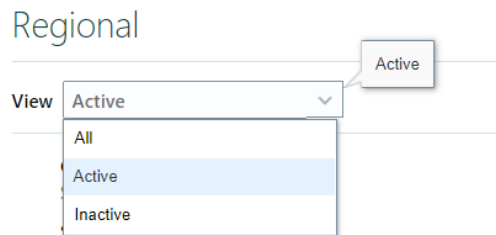
View: Active

Calculation Component State Taxes	Forms LA	
State LA	Start and End Dates 7/20/23	
Allowances 1	Secondary Allowance Additional Tax Amount	
Calculation Component State Taxes	Start and End Dates 1/1/19	
State TX		

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.