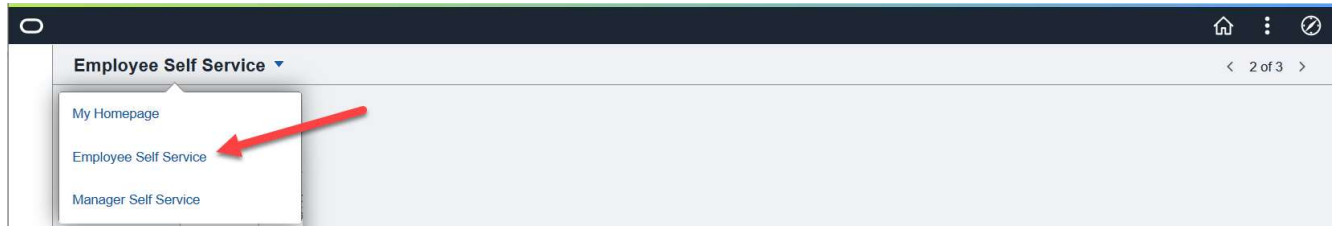




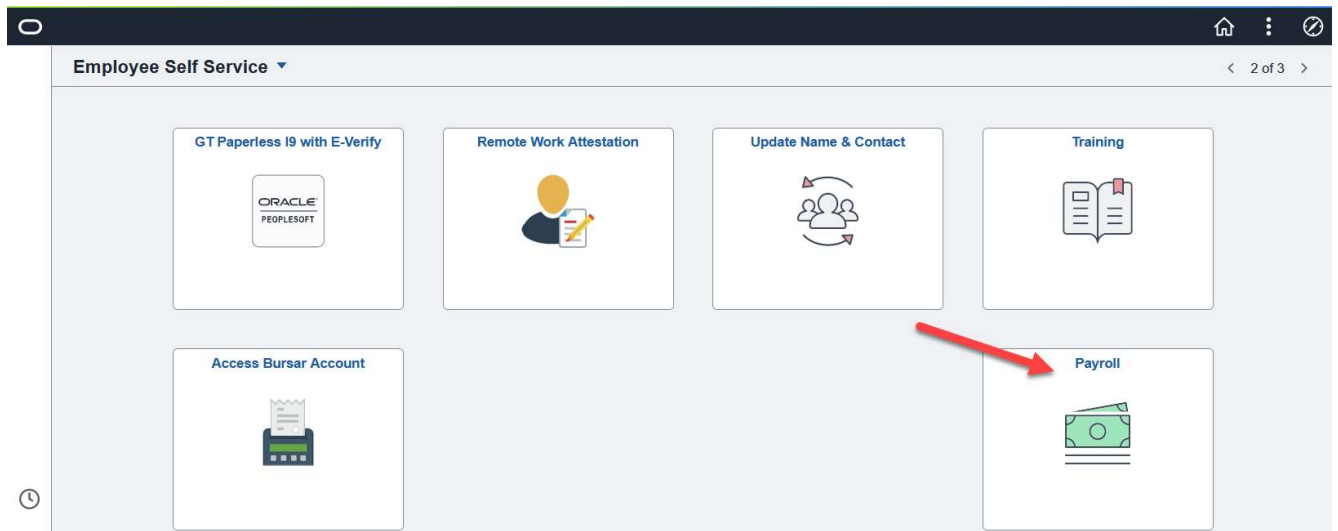
Step How to Update Your W4 in Employee Self Service

Navigation: Employee Self Service

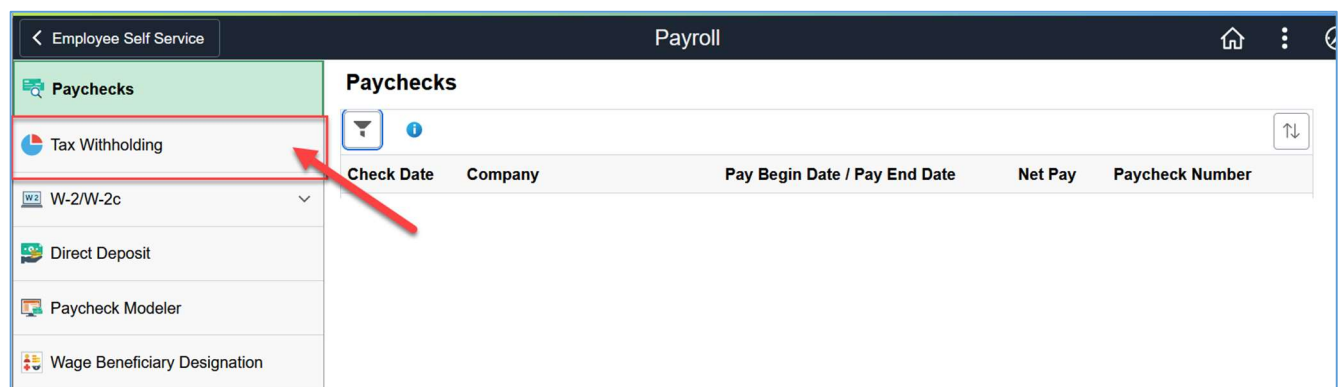
- 1 Using the down menu in PeopleSoft HR, select “Employee Self Service”. Note: The options you see in this menu depend on your security access in the system.



- 2 Next, we will click on the “Payroll” tile.



- 3 Click Tax Withholding menu.





- 4 The Tax Withholding has additional information and tools at the top of the page. The page will show current settings of both your Federal and State W4. To update either one of them, click in the section.

Tax Withholding

Company University of Oklahoma HSC

Please select either your Federal or State W-4 below by clicking the arrowhead, >, for the relevant W-4 form. Read the instructions provided on each pop-up page as you navigate. Please use the [Job Aid - Updating your W-4 in Employee Self Service](#) for step-by-step instructions on completing the W-4 process.

NOTE: W-4 forms cannot be updated from a mobile device. This W-4 form must be updated in Adobe Acrobat in a desktop application (not within the internet browser). If you encounter problems updating your W-4, please try our [W-4 Troubleshooting Guide](#) to adjust your internet browser settings. If you are still unable to successfully edit your W-4, please contact the IT Service Desk.

IF YOU ARE WORKING IN THE STATE OF OKLAHOMA AND WISH TO USE THE FORMER FORM (NON-PDF) FORMAT, PLEASE CLICK on the [Tax Withholding FORMER FORMS](#) link below.

Tax Withholding [FORMER FORMS](#)

Status Active

Form Type	Jurisdiction	Withholding Details	
Federal	Federal	Tax Status Married	Dependent Amount 0.00
		Other Income 0.00	Deductions 0.00
		Extra Withholding 0.00	Other
State	Oklahoma	Tax Status Exempt	Withholding Allowances
		Additional Amount	Additional Allowances
		Additional Percentage	Other

- 5 A pop-up will appear with the description of the W4 and instructions. Once you have read the information, click the form section on the pop up to open the form in PDF (example in red box below). Some forms also have links to Additional Agency Links which may apply. The Federal W4 has a link for the Tax Withholding Estimator (in green box below) provided by the IRS to assist you with completing your W4 for your personal tax situation.

Federal Tax Withholding Forms

Company University of Oklahoma HSC

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 the marital status and your entries for steps 2 through 4 on Form W-4. You may also specify that an additional dollar amount of tax be withheld. You can file a new Form W-4 any time your tax situation changes and you choose to have more, or less, tax withheld.

You can make changes online using the downloaded updatable PDF form and submit the changes for processing by your payroll department. Be sure to print or save a copy of the completed form for your records.

Updateable Forms

Form Description
Federal Withholding Allowance Certificate

Additional Agency Links

URL Link Description
IRS Tax Withholding Estimator



6 If you have your internet browser settings to open Adobe forms outside of the internet browser, you will receive a WARNING pop-up that you are leaving the system and opening a form with personal information.

WARNING

The system will download to your computer a copy of the tax form which contains personal information.
You should only continue if you are using a trusted and secure computer.
You should not continue if you are using a shared computer or public computer (such as those in a library or internet café); doing this could leave your personal information vulnerable.

7 The form should now open in Acrobat software. This should be either Reader or Pro version of the desktop application. For MacBook users only, this form must be opened in Adobe Reader application and will not work in Adobe Pro. This form should not be opened in the browser or it will not show the green submit button in the next step. **If the form opens in the browser, you will need to save the form to your computer and reopen it in a desktop version of Acrobat. The form WILL NOT function properly if in an internet browser.** For assistance with troubleshooting, see the [W4 PDF Troubleshooting Guide](#) linked at the top of the Tax Withholding page in PeopleSoft.

Note, the form will default with your name, social security number, and address information. You will need to complete Steps 1-4 as applicable to your personal tax situation.

Form W-4
Employee's Withholding Certificate

Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay.
Give Form W-4 to your employer.
Your withholding is subject to review by the IRS.

OMB No. 1545-0074
2023

Step 1: Enter Personal Information

(a) First name and middle initial John K.	Last name Doe	(b) Social security number XXX-XX-9999
Address 123 Sunnyslane		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 .
City or town, state, and ZIP code Oklahoma City, OK 73999		
(c) <input checked="" type="radio"/> Single or Married filing separately <input type="radio"/> Married filing jointly or Qualifying surviving spouse <input type="radio"/> Head of household (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.)		

Complete Steps 2-4 ONLY if they apply to you; otherwise, skip to Step 5. See page 2 for more information on each step, who can claim exemption from withholding, other details, and privacy.

8 After you have completed all applicable areas of the form, scroll to the bottom of the form. If you have opened the form properly in a desktop application, you should see a green Submit button on the bottom of the form. Your name and the University information is already complete in Step 5. When complete, click the submit button.

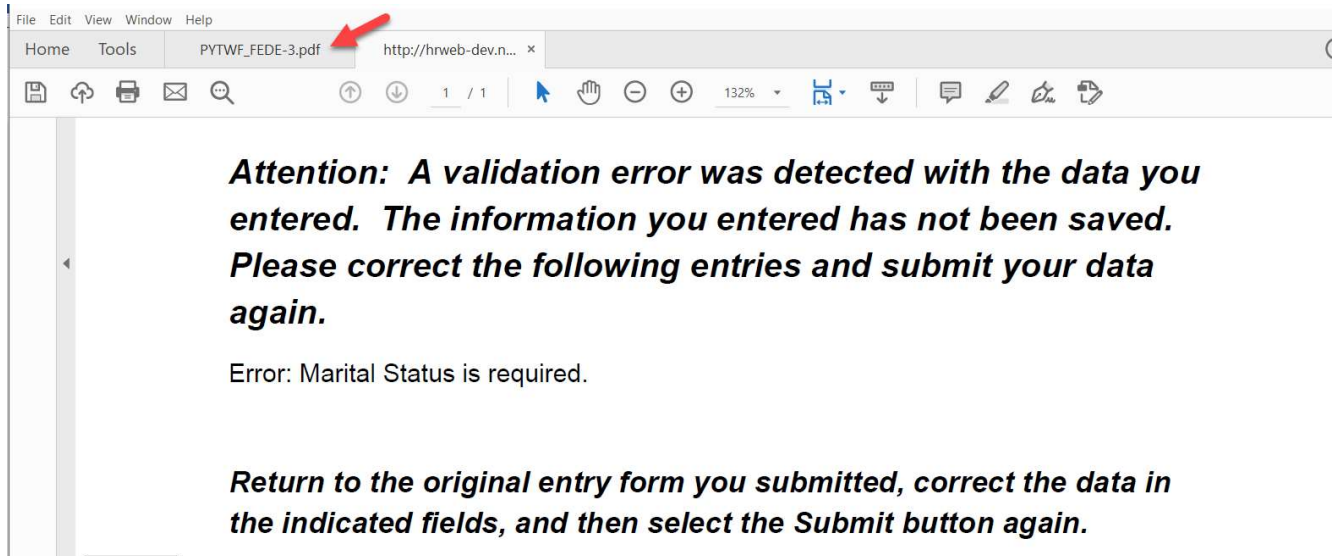
Step 5: Sign Here	Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.		
	John K. Doe		2023-10-22
	Employee's signature (This form is not valid unless you sign it.)		Date
Employers Only	Employer's name and address	First date of employment	Employer identification number (EIN)
	University of Oklahoma HSC P.O.BOX 26901 Oklahoma City, OK 73190		

For Privacy Act and Paperwork Reduction Act Notice, see page 3. Cat. No. 10220Q Form **W-4** (2023)

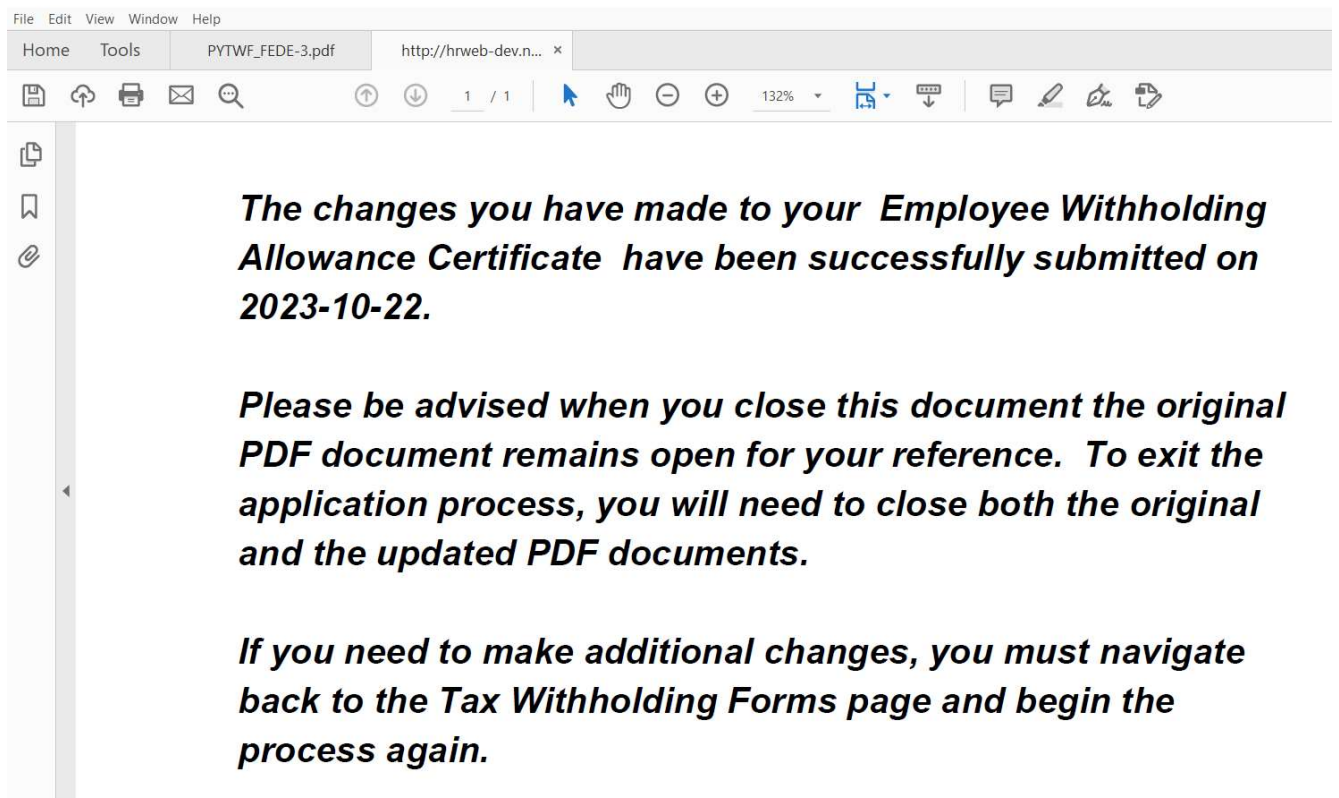
Submit



- 9 If there are errors on your submission, a second tab in Adobe will open with an Error message. Read the message then navigate back to the first tab, correct the error, and click the green submit button again.

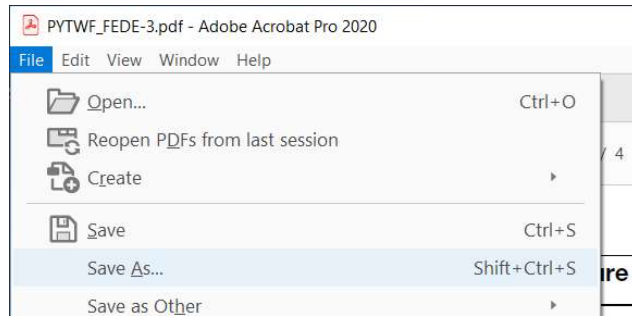


- 10 Once your form has submitted without errors you will receive another tab in Adobe that states the form has been submitted successfully.

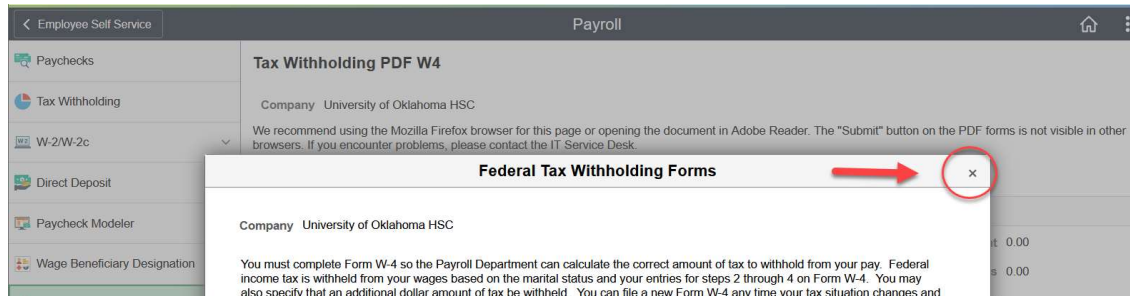




- 11 If you wish to save a copy of the form you submitted, click on the original/first tab in Adobe where your form is still visible and navigate to save the form.



- 12 Close Adobe after submitting and saving the form; navigate back to the internet browser. Close the original form pop-up box using the x circled below.



- 13 Your Tax Withholding form you updated should now reflect your updated information. If the data does not update on the screen, ensure you closed the Adobe document, click another menu option in PeopleSoft and click Tax Withholding again.

NOTE: IF YOU ARE UPDATING BOTH FEDERAL AND STATE W4 FORMS, YOU MUST CLOSE THE FIRST FORM BEFORE SUBMITTING THE SECOND FORM OR THE SYSTEM WILL NOT LOAD THE FORM AND WILL SEND YOU AN EMAIL LATER THAT IT ERRED.

W-4 Tax Information Payroll

Tax Withholding

Company University of Oklahoma HSC

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		Extra Withholding 25.00	Other
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		Additional Amount	Additional Allowances
		Additional Percentage	Other