

Central Payroll Bureau

Employee Self Service (ESS)

Tax Elections for New Employees – Overview

This job aid provides instructions for new employees to complete their initial Federal (W-4), State, and Local Tax Withholding Elections in Workday as part of the onboarding process. Employees will enter their withholding information using the applicable tax forms to establish their payroll tax elections.

Applicable Roles:

- Employee (ESS)

This job aid provides system navigation only and is not tax advice. Review the IRS W-4 instructions and your state guidance or consult a tax professional if you're unsure. If you cannot access or complete your Tax Elections onboarding tasks in Workday, contact HR/Payroll Support for assistance.



ESS – Tax Elections for New Employees

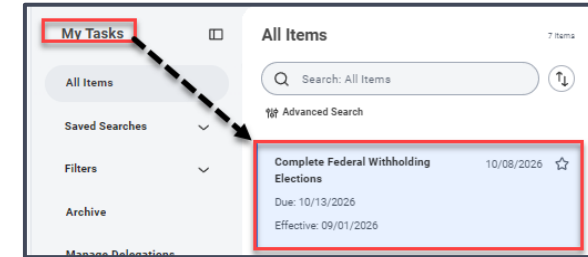


Description:

This job aid guides new employees through completing their initial Federal (W-4) and State Tax Withholding Elections in Workday as part of the onboarding process.

Steps:

1. From the Workday Homepage, click the **My Tasks** icon  in the upper-right corner.
2. In **My Tasks**, locate and select Complete Federal Withholding Elections from the All Items list.
3. In the **Complete Federal Withholding Elections** task, review your employee information, including Company, Effective Date, Name, Social Security Number, and Address.
4. Under W-4 Data, select your applicable **Marital Status** (Filing Status) to begin completing your Federal W-4 withholding elections.



Complete Federal Withholding Elections

Company	State of Maryland
Effective Date	10/08/2026
Name	Kevin McCallister
Social Security Number	XXX-XX-XXXX
Address	123 Maryland Road Baltimore, MD 21201 United States of America

W-4 Data

[View Blank Form](#)

Step 1:

Marital Status *

Complete Steps 2-4 ONLY if they apply. See page 2 for more information on each step, who can claim exemption from withholding, when to use the estimator at www.irs.gov/W4App, and privacy.

Step 2:

Multiple Jobs or Spouse Works ☐

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 of these jobs.

Do only one of the following:
(a) Use the estimator at www.irs.gov/W4App for most accurate withholding for this step (and Steps 3-4). If you or your spouse have self-employment income, use this option; or
(b) Use the Multiple Jobs Worksheet on page 2 and enter the result in Step 4(c) below; or
(c) If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is generally more accurate than Step 2(b) if pay at the lower paying job is more than half of the pay at the higher paying job. Otherwise, Step 2(b) is more accurate.

Complete Steps 3-4(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 3-4(b) on the Form W-4 for the highest paying job.)



Tip: New employees must complete both the Federal and State and Local Withholding Elections tasks in My Tasks during onboarding. Be sure to submit each task separately.

ESS – Tax Elections for New Employees (cont'd)



Description:

This section guides new employees through completing their initial Federal W-4 withholding elections in Workday as part of the onboarding process.

Steps:

1. Complete the remaining applicable sections of the Federal W-4, including Multiple Jobs or Spouse Works, Claim Dependents, and Other Adjustments.
2. Review the Legal Notice, select **I Agree**, and click **Submit** to complete your Federal Withholding Elections.
3. Return to My Tasks and select Complete State and Local Withholding Elections from the All Items list.



Tip: Review all applicable sections of your Federal W-4 carefully before submitting. Verify that your filing status, dependent information, and any additional withholding amounts are accurate.

Step 3:

Claim Dependents

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

Number of Qualifying Children Under Age 17

Total Amount for Qualifying Children 0.00

Number of Other Dependents

Total Amount for Other Dependents 0.00

Calculated Total Dependent Amount 0.00

Override Total Dependent Amount

Step 4 (optional):

Other Adjustments

Other Income (not from jobs): If you want tax withheld for other income you expect this year that won't have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income.

(a) Other Income (not from jobs)

Deductions. Use the Deductions Worksheet on page 4 to determine the amount of deductions you may claim, which will reduce your withholding. (If you skip this line, your withholding will be based on the standard deduction.) Enter the result here.

(b) Deductions

Extra Withholding: Enter any additional tax you want withheld each pay period.

(c) Extra Withholding

Exempt from withholding: I claim exemption from withholding for 2026, and I certify that I meet both of the conditions for exemption for 2026. See Exemption from withholding on page 2. I understand I will need to submit a new Form W-4 for 2027.

You may claim exemption from withholding for 2026 if you meet both of the following conditions: you had no federal income tax liability in 2025 and you expect to have no federal income tax liability in 2026

Exempt from withholding ☐

Nonresident Alien: If you're a nonresident alien, see Notice 1392, Supplemental Form W-4 Instructions for Nonresident Aliens, before completing this form.

Nonresident Alien ☐

Step 5:

Legal Notice

Your Name and Password are considered as your "Electronic Signature" and will serve as your confirmation of the accuracy of the information being submitted. When you click in the "I Agree" checkbox, you are certifying that:

1. Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.
2. You understand that your payroll tax withholding election is a legal and binding transaction.
3. You understand that all submissions are contingent upon acceptance by your Payroll representative.

If you do not wish to use the electronic signature option, print a paper copy of the form. The form is not valid without a signature.

I Agree ☒

ESS – Tax Elections for New Employees – W-4 Reference



Description:

This section provides helpful guidance for new employees completing their initial Federal W-4 withholding elections in Workday as part of the onboarding process.



Step 1 (Filing Status): Pick the status that matches today—it drives your baseline withholding.

Step 2 (Multiple Jobs/Spouse): Complete this section if you have more than one job or are married filing jointly and your spouse also works. Use the IRS Tax Withholding Estimator if you need assistance.

Step 3 (Dependents): Enter the applicable amounts for qualifying children and other dependents. Workday calculates the total dependent amount.

Step 4 (Other Adjustments): Enter any applicable Other Income (not from jobs), Deductions, or Extra Withholding per paycheck. Select Exempt only if you meet the IRS eligibility requirements.

Step 5 (Legal Notice): Review the legal notice, select I Agree, and click Submit to complete your federal withholding elections.



ESS – Tax Elections for New Employees– State & Local

Description:

This section guides new employees through completing their initial Maryland MW507 State and Local Tax Withholding Elections in Workday as part of the onboarding process.

Steps:

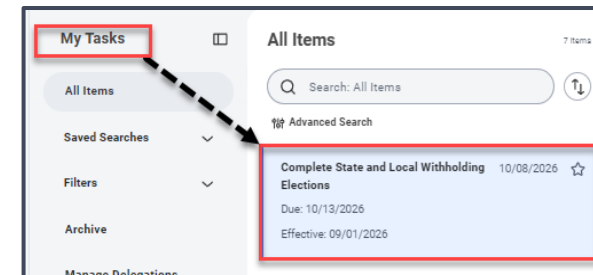
1. From **My Tasks**, locate and select Complete State and Local Withholding Elections from the **All Items** list.
2. In the **Complete State and Local Withholding Elections** task, review the **Company**, **Effective Date**, **State**, and **Withholding Form Type** fields.

Note: Complete the fields if they are not auto-populated.

3. Click **OK**.



Tip: Federal and State and Local Withholding Elections are separate onboarding tasks. Complete and submit both tasks to establish your initial payroll tax withholding information.



Complete State and Local Withholding Elections

Worker: Kevin McCallister (W2242165)

Company:

Effective Date: 10/08/2026

State:

Withholding Form Type:

ESS – Tax Elections for New Employees– State & Local Tax



Description:

This section guides new employees through completing their initial Maryland MW507 State and Local Tax Withholding Elections in Workday as part of the onboarding process.

Steps:

1. Confirm that the applicable withholding form is **MW507 – Withholding** for Maryland.
2. Complete the required Maryland MW507 withholding information:
 - County of Residence
 - Marital Status
 - Number of Exemptions (if applicable)
 - Additional Withholding (if applicable)
3. If eligible to claim exemption from Maryland withholding, select Exempt and complete the Reason for Exemptions and Effective Year fields.
4. If applicable, select Military Spouse Exemption and complete the State of Domicile field.
5. Review and select the **I agree** checkbox.
6. Click **Submit**.

Complete State and Local Withholding Elections

Company	State of Maryland
Effective Date	10/08/2026
Name	Kevin McCallister
State	Maryland
Social Security Number	XXX-XX-XXXX
Address	123 Maryland Road Baltimore, MD 21201 United States of America

Maryland MW507 Data

[View Blank Form](#)

County of Residence

Marital Status

Number of Exemptions

Additional Withholding

Exempt ☐

Reason for Exemptions (empty)

Effective Year (empty)

Military Spouse Exemption ☐

State of Domicile (empty)

Legal Notice

Your Name and Password are considered as your "Electronic Signature" and will serve as your confirmation of the accuracy of the information being submitted. When you click in the "I Agree" checkbox, you are certifying that:

1. Under penalties of perjury, you declare that you have examined this certificate and to the best of your knowledge and belief, it is true, correct, and complete.
2. You understand that your payroll tax withholding election is a legal and binding transaction.
3. You understand that all submissions are contingent upon acceptance by your Payroll representative.

If you do not wish to use the electronic signature option, print a paper copy of the form.
The form is not valid without a signature.

Under the penalty of perjury, I further certify that I am entitled to the number of withholding allowances claimed on line 1 above, or if claiming exemption from withholding, that I am entitled to claim the exempt status on whichever line(s) I completed.

I Agree ☐