Central Payroll Bureau

Employee Self Service (ESS)

View and Update Tax Elections – Overview

This job aid provides instructions for employees to view or update their Federal (W-4), State, and Local Tax Withholding Elections in Workday. Employees can review their existing elections and make updates when their tax circumstances change.

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 can't view or update Withholding Elections in Workday, contact HR/Payroll Support to check your access or employment setup.

Job Aid

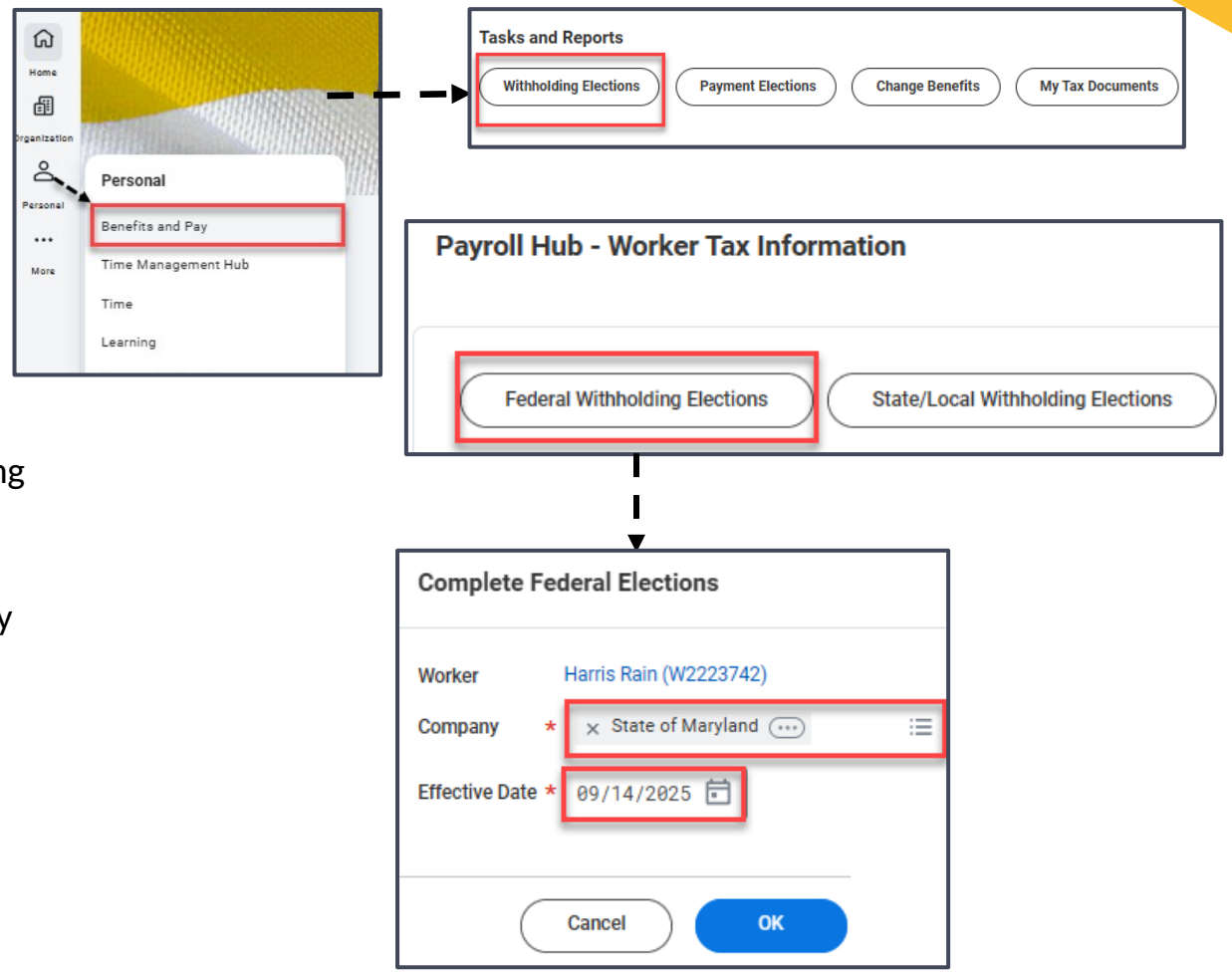


ESS - Tax Elections

Description: This job aid guides employees through viewing or updating their Federal (W-4) and State Tax Withholding Elections in Workday.

Steps:

1. From the Workday homepage, hover over Personal on the left navigation panel.
2. Under Personal, click **Benefits and Pay**.
3. In **Tasks and Reports**, click **Withholding Elections**.
4. Under Payroll Hub – Worker Tax Information, click Federal Withholding Elections.
5. The Complete Federal Elections window opens. Confirm the Company and select the appropriate Effective Date.
6. Click **OK**.



Tip: Review your Federal and State/Local Tax Withholding Elections periodically and update them when your tax circumstances change.

ESS - Tax Elections – W-4

Description: This section guides existing employees through reviewing or updating their Federal W-4 Tax Withholding Elections in Workday.

Steps:

1. Review your employee information, including Company, Effective Date, Name, Social Security Number, and Address, to ensure it is accurate.

2. In the W-4 Data section, select your applicable Marital Status (Filing Status).

3. If applicable, select Multiple Jobs or Spouse Works if you have more than one job or are married filing jointly and your spouse also works.

4. If applicable, enter the amounts for qualifying children and other dependents in the Claim Dependents section.



Tip: Review your Federal W-4 Tax Withholding Elections periodically and update them when your withholding information needs to change.

ESS - Tax Elections – W-4 (Continued)

Description: This section guides existing employees through completing the remaining sections of their Federal W-4 Tax Withholding Elections in Workday.

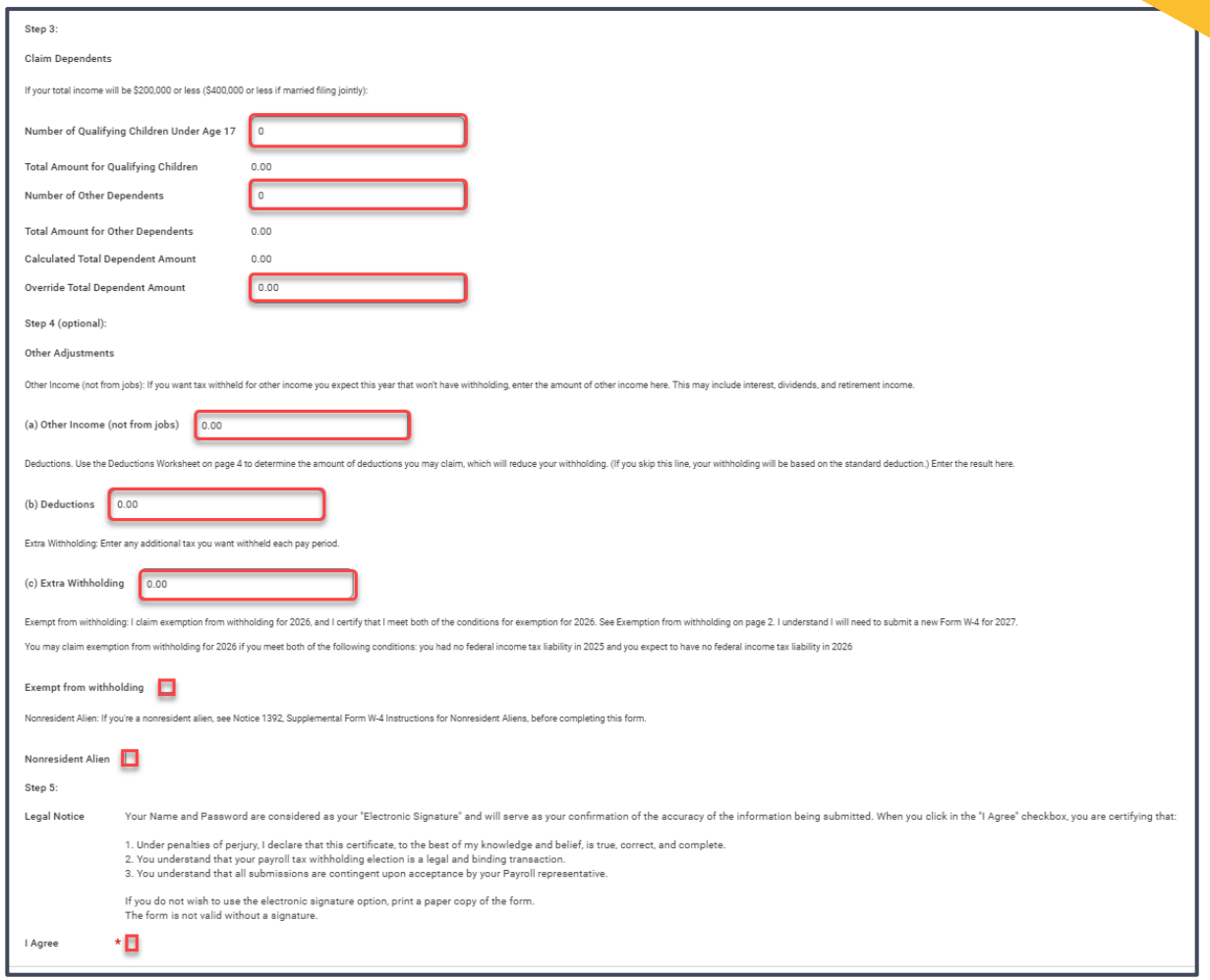
Steps:

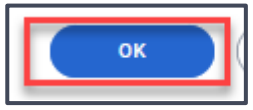
1. If applicable, complete the Other Adjustments section by entering amounts for Other Income (not from jobs), Deductions, and Extra Withholding per paycheck.

2. If applicable, select Exempt from withholding or Nonresident Alien based on your eligibility.

3. Review the Legal Notice, select I Agree, then click OK to save your Federal W-4 Tax Withholding Elections.

Tip: Review your Federal W-4 Tax Withholding Elections carefully before clicking OK to ensure your information is accurate.





ESS - Tax Elections - Reference

Description: This section provides helpful guidance for existing employees reviewing or updating their Federal W-4 Tax Withholding Elections in Workday.

W-4 Steps 1-5



Step 1 (Filing Status): Select the filing status that accurately reflects your tax situation. Your selection helps determine your federal income tax 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 determining your withholding.

Step 3 (Dependents): Enter the applicable information for qualifying children and other dependents. Workday calculates the total dependent amount based on your entries.

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

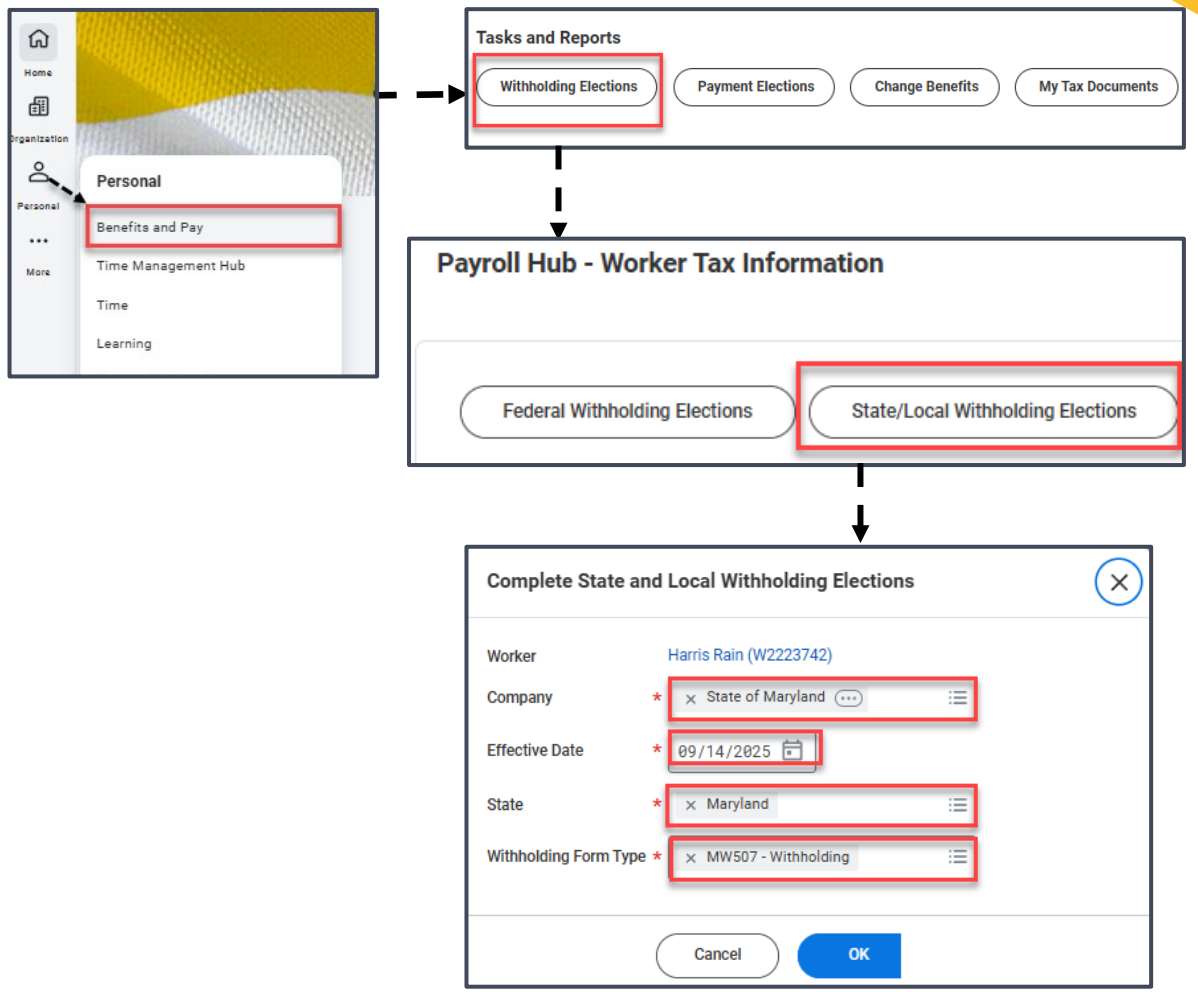
Step 5 (Legal Notice): Review your withholding elections for accuracy, read the Legal Notice, select I Agree, and click OK to save your changes.

ESS - Tax Elections – State & Local

Description: This section guides existing employees through reviewing or updating their State and Local Tax Withholding Elections in Workday.

Steps:

1. From the Workday homepage, click **Personal** on the left navigation panel.
2. Under Personal, click **Benefits and Pay**.
3. In Tasks and Reports, click **Withholding Elections**.
4. On the Payroll Hub – Worker Tax Information page, click **State/Local Withholding Elections**.
5. Confirm the **Company**, select the appropriate **Effective Date**, **State**, and **Withholding Form Type**, then click **OK**.



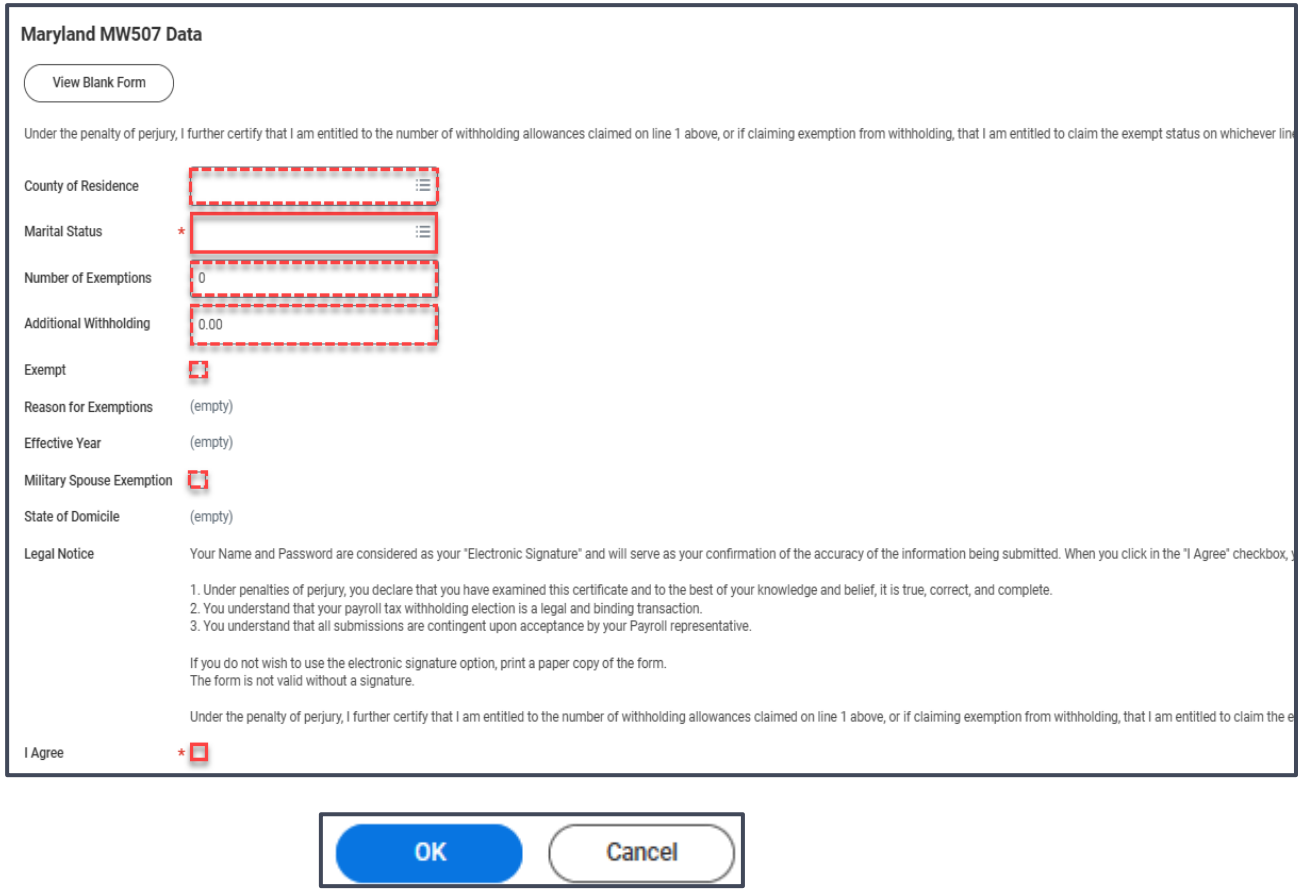
Tip: Review your State and Local Tax Withholding Elections carefully before saving. Make sure all required fields are completed and your information is accurate.

ESS - Tax Elections - MW507

Description: This section guides existing employees through reviewing or updating their Maryland MW507 Employee Withholding Exemption Certificate in Workday.

Steps:

1. **County & Marital Status**
   - Select your County of Residence based on your home address, then select your applicable Marital Status.
2. **Exemptions:** Complete the applicable option:
   - **Number:** Enter the number of withholding exemptions you are claiming.
   - **Exempt:** If eligible, select Exempt and complete the Reason for Exemptions and Effective Year fields.
   - **Note:** Do not complete both options.
3. **Additional Withholding** (optional)
   - Enter any additional dollar amount you would like withheld from each paycheck for Maryland state income taxes.
4. **Military Spouse** (if applies)
   - If eligible, select Military Spouse Exemption and complete the State of Domicile field, as applicable. Supporting documentation may be required.
5. **Review & Confirm**
   - Read the Legal Notice, select **I Agree**, then click **OK** to save your State and Local Tax Withholding Elections.



Tip: Review your County of Residence, Marital Status, and withholding exemptions carefully to ensure your Maryland State and Local Tax Withholding Elections are accurate. County of Residence drives Local taxation for the state of Maryland.