# 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 an employee's job assignment.

- If not elected at hire, W-4 tax withholding status in Oracle HCM 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 the year.

- W-4s are recorded at the "person level" in Oracle HCM so it applies to all the job assignments linked to a Person Record. Employees 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 <u>one</u> 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.

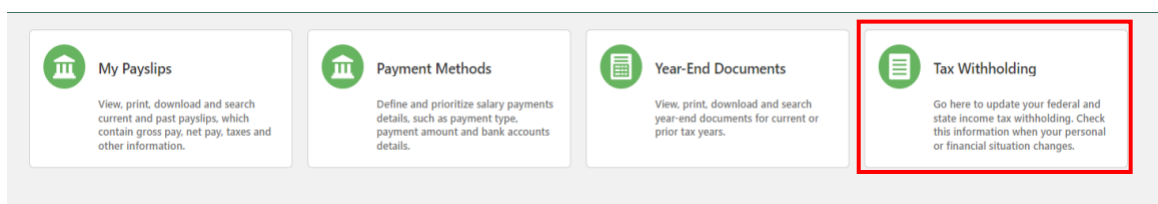- Tax calculation could be impacted due to enhanced employee location tracking.

Employee Tax Election

Performed by: Employee

1. Navigate to **Homepage**, select the **Me** tab**.** Select the **Pay** icon in the App section.
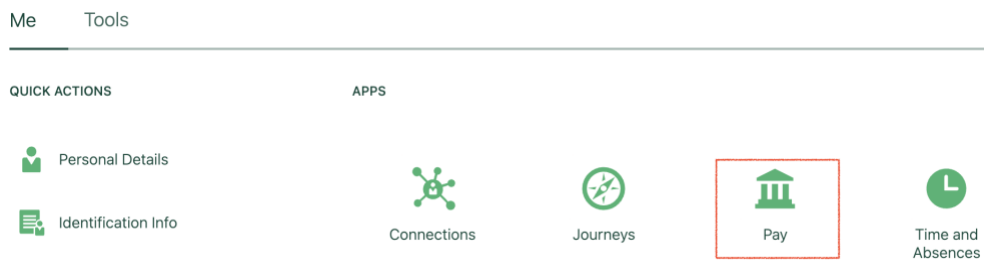
2. The following options appear. Select **Tax Withholding.**

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3. Select the **pencil icon** to **edit Federal Tax Elections**. To edit **Regional**, or **State Taxes**, skip to **Step 6**.

4. Employees are required to fill out the **Effective Date** and the **Filing Status**. Once the employee is finished editing, check the **I agree** box. **Note:** the change start date cannot be backdated. Once complete select **Submit.**

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

6. Under the **Regional** tab, select the **pencil icon** to edit elections.

Note: If an employee moves between different states frequently, they should have a Regional Tax form for each state.

7. The employee can fill in the required fields and once completed, select **Submit**.

8. To add a new *Regional Tax Withholding*, select the **+Add** button.

9. The employee selects an option from the *What do you want to add?* field.

10. Once selected, the **State** field appears. Select a state in the *State* field, complete applicable information, and check the *I agree* box. Once complete, the select **Create** (top right).

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

12. To reference the new digital State Tax form, click on the **hyperlink below the Form section**.

13. To view previous tax elections, select **Inactive** on the right-hand side of the screen.