

Step-by-Step Instructions

Zachry Business Use Case

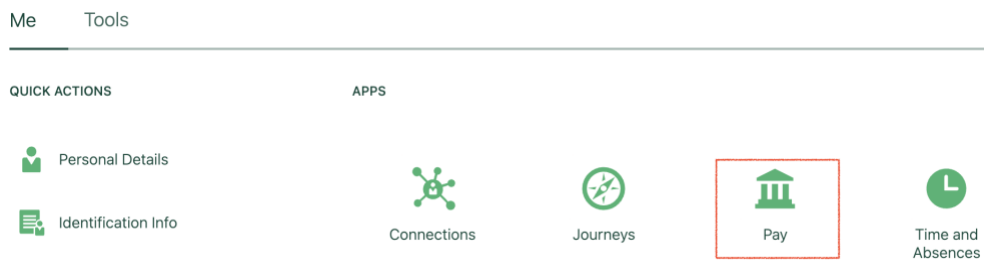
Use the Tax Withholding section to make elections for Federal and State taxes. Payroll taxes are calculated using the employee's state of residency and work location. Work location is derived from an employee's job assignment.

- 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 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.

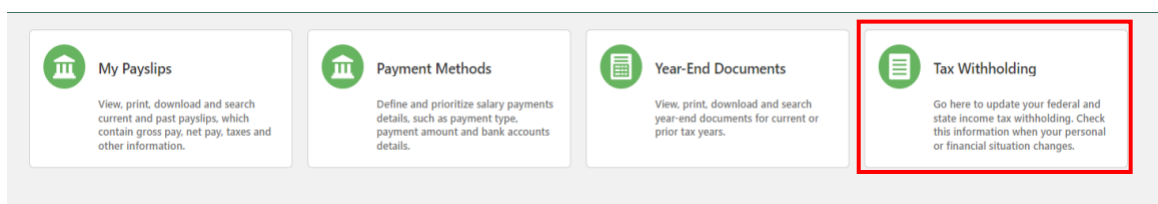
Employee Tax Election

Performed by: Employee

1. Navigate to **Homepage**, select the **Me** tab. Select the **Pay** icon in the App section.



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



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

Calculation Cards
Zachry Enterprise Solutions

Federal Regional

Federal Taxes
3/28/22 - Ongoing

Calculation Component Federal Taxes	Component Sequence 1	Forms Federal
Filing Status Married filing jointly or Qualifying widow(er)	Multiple Jobs No	Qualifying Dependents Amount \$0.00
Other Dependents Amount \$0.00	Total Dependents Amount \$0.00	Other Income Amount \$0.00
Deductions Amount \$85.00	Extra Withholding \$0.00	Exempt from Federal Income Tax Withholding No

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**.

Federal Taxes
Tax Withholding

Cancel **Submit**

When does this change start?
3/11/25

Calculation Component
Federal Taxes

Component Sequence
1

Forms
[Federal](#)

Withholding Status

Step 1: Enter Personal Information

Note: Select **Head of household** only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.

Filing Status
Married filing jointly or Qualifying surviving spouse

Complete Steps 2-4 ONLY if they apply to you. Otherwise, skip to Step 5.
See form page 2 for more information on each step, who can claim exemption from withholding, and when to use the estimator at www.irs.gov/W4App.

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 3 and enter the result on Step 4(c) below; **or**

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

☐ I agree

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

Federal Taxes
3/28/22 - Ongoing

Calculation Component Federal Taxes	Component Sequence 1	Forms Federal
Filing Status Married filing jointly or Qualifying widow(er)	Multiple Jobs No	Qualifying Dependents Amount \$0.00

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

Calculation Cards
Zachry Enterprise Solutions

Federal **Regional**

+ Add

All Active Inactive

State Taxes: TX
3/28/22 - Ongoing

Calculation Component
State Taxes

Component Sequence
1

State
TX

[Pencil icon]

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

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

State Taxes: TX
Tax Withholding

Cancel **Submit**

When does this change start?
3/11/25

Calculation Component
State Taxes

Component Sequence
1

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

☐ I agree

Required

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

Calculation Cards
Zachry Enterprise Solutions

Federal **Regional**

+ Add

All Active Inactive

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

Add Calculation Component
Tax Withholding

Cancel Create

When does this change start?
3/11/25

What do you want to add?

State Taxes

Pennsylvania PSD

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.