

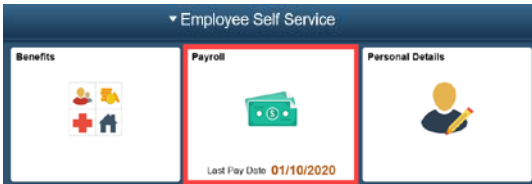

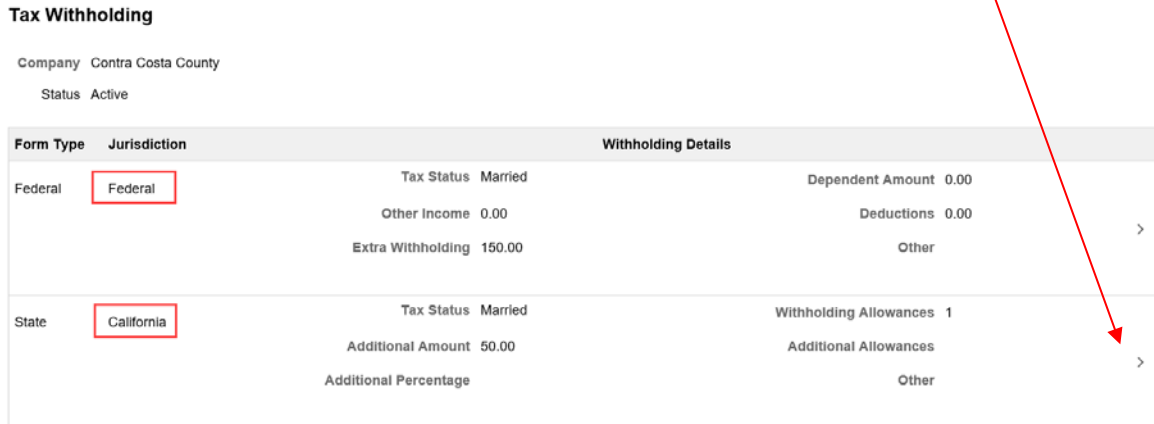


## Updating CA State (DE 4) Tax Withholding

**Requirements:** To use the updateable PDF tax forms, employees must have proper **internet access** and **Adobe Acrobat Reader DC** installed. In addition, and due to current Adobe PDF limitations, updateable PDF tax forms are available only from a desktop or laptop; they are not available from a mobile device. Employees who cannot submit tax changes online, must complete a form and submit to the Office of the Auditor-Controller Payroll Division, for processing.

[Click here to Download Adobe PDF Reader](#)



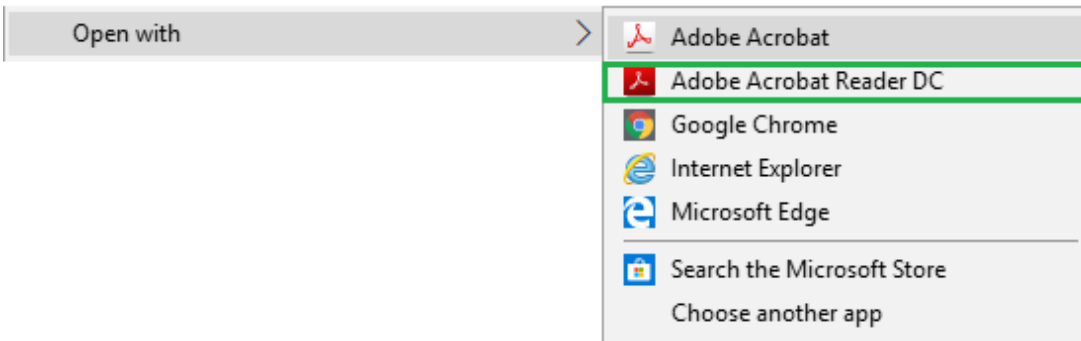
### Instructions:

Step	Action
1.	<p>Log in to PeopleSoft Employee Self Service, and click on the Payroll Tile.</p> 
2.	<p>Access the <b>Tax Withholding</b> panel to review or update your tax withholding elections.</p> 
3.	<p>You will see two tax jurisdictions under Tax Withholdings - Federal and State (California). The arrowheads on the right indicate that a form is available for update.</p> 

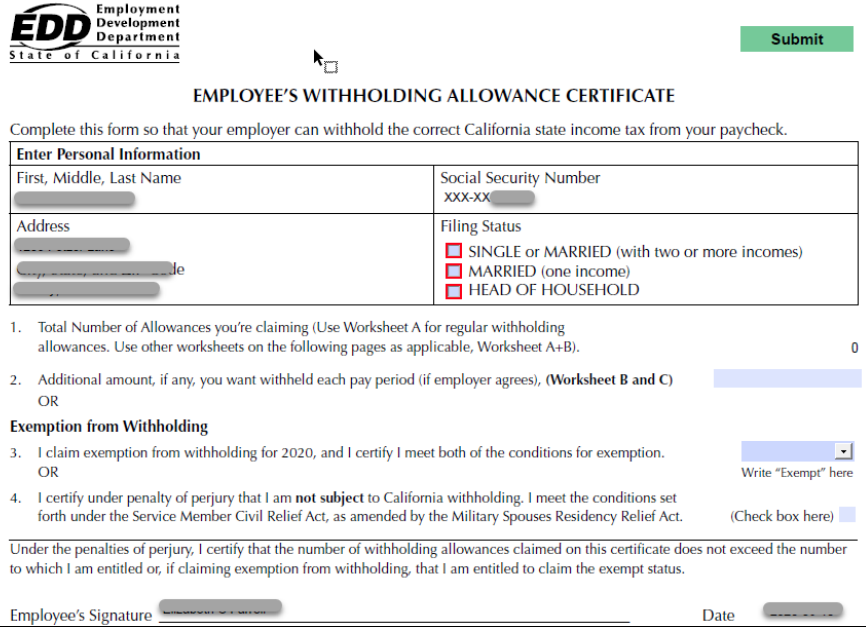



Step	Action																																	
4.	<p>Each tax jurisdiction is separate, and will display your current tax withholding elections under Withholding Details.</p> <p><b>Tax Withholding</b></p> <p>Company Contra Costa County</p> <p>Status Active</p> <table><tr><th>Form Type</th><th>Jurisdiction</th><th>Withholding Details</th></tr><tr><td>Federal</td><td>Federal</td><td><table><tr><td>Tax Status</td><td>Married</td><td>Dependent Amount</td><td>2000.00</td></tr><tr><td>Other Income</td><td>0.00</td><td>Deductions</td><td>0.00</td></tr><tr><td>Extra Withholding</td><td>0.00</td><td>Other</td><td>Multiple Jobs/Spouse Works</td></tr></table></td></tr><tr><td>State</td><td>California</td><td><table><tr><td>Tax Status</td><td>Single</td><td>Withholding Allowances</td><td>1</td></tr><tr><td>Additional Amount</td><td>0.00</td><td>Additional Allowances</td><td></td></tr><tr><td>Additional Percentage</td><td></td><td>Other</td><td></td></tr></table></td></tr></table>	Form Type	Jurisdiction	Withholding Details	Federal	Federal	<table><tr><td>Tax Status</td><td>Married</td><td>Dependent Amount</td><td>2000.00</td></tr><tr><td>Other Income</td><td>0.00</td><td>Deductions</td><td>0.00</td></tr><tr><td>Extra Withholding</td><td>0.00</td><td>Other</td><td>Multiple Jobs/Spouse Works</td></tr></table>	Tax Status	Married	Dependent Amount	2000.00	Other Income	0.00	Deductions	0.00	Extra Withholding	0.00	Other	Multiple Jobs/Spouse Works	State	California	<table><tr><td>Tax Status</td><td>Single</td><td>Withholding Allowances</td><td>1</td></tr><tr><td>Additional Amount</td><td>0.00</td><td>Additional Allowances</td><td></td></tr><tr><td>Additional Percentage</td><td></td><td>Other</td><td></td></tr></table>	Tax Status	Single	Withholding Allowances	1	Additional Amount	0.00	Additional Allowances		Additional Percentage		Other	
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5.	<p>To update your <b>State Tax Withholding</b>, select State jurisdiction. For instructions on updating your Federal Taxes, refer to the Federal Tax Withholding Job Aid under epay.</p> <table><tr><th>Form Type</th><th>Jurisdiction</th></tr><tr><td>Federal</td><td>Federal</td></tr><tr><td>State</td><td>California</td></tr></table>	Form Type	Jurisdiction	Federal	Federal	State	California																											
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6.	<p>The State Tax Withholding Forms page appears.</p> <div><p><b>State Tax Withholding Forms</b></p><p>Company Contra Costa County</p><p>You may complete California Form DE 4 so the Payroll Department can calculate the correct amount of tax to withhold from your pay. California income tax is withheld from your wages based on what you claim on the Employee's Withholding Allowance Certificate (form DE 4). You can file a new DE 4 Form anytime your tax situation changes.</p><p>Whether you are entitled to claim a certain number of allowances or exemptions from withholding is subject to review by the State. Your employer may be required to send a copy of this form to the Agency.</p><p>You can make changes to your withholding allowances online using the downloaded updateable 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.</p><p>If you cannot submit your tax withholding changes online using the PDF forms, please print, complete the form, and submit to:</p><p>Office of the Auditor-Controller Payroll Division 625 Court St. Rm 203 Martinez, CA 94553</p><p><b>Updateable Forms</b></p><table><tr><th>Form Description</th></tr><tr><td>DE 4 Employee's Withholding Allowance Certificate</td></tr></table></div>	Form Description	DE 4 Employee's Withholding Allowance Certificate																															
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Step	Action
7.	<p>Read the information on the page, and when ready to make an update, click on the DE 4 form, under Updateable Forms.</p> 
8.	<p>The system displays a warning that a form with personal information will be downloaded to the user's computer. Click OK to proceed.</p> 
9.	<p>If you continue past the warning message, the system downloads the form and, depending on the browser settings, will prompt you to save or open the PDF file. From your browser, download and <b>save</b> the file to your computer. <b>Do not click Open.</b></p> <p><b>You will first need to click on 'Save', 'Open with', and select Adobe Reader. <u>Only Save if you are using your own trusted computer device.</u> Adobe Acrobat Reader DC must be installed on your PC).</b></p> <p>Locate the file saved on your computer and right click to see options for opening the file. See below. Always use <b>Adobe Acrobat Reader</b> to open the file.</p> 
10.	<p>PDF form will open. This may take a few seconds. NOTE: If you do not see the Submit button on the bottom of the form, do not enter any information, contact Helpdek Support.</p>

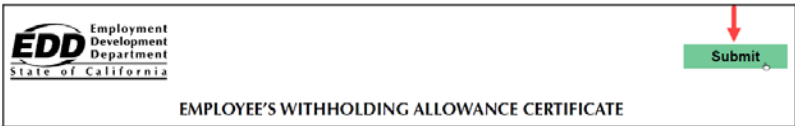
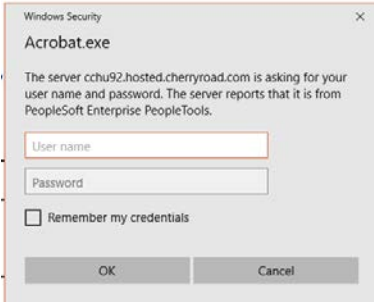


Step	Action				
	If the browser does not prompt the employee to open the file, employee can open it manually.				
11.	The updateable DE 4 form will appear on your screen. <b>Only pages 1 and 3</b> of online tax form DE 4 are fillable. Please take note of this as you are completing the form.				
12.	<p>The online Form DE 4 will have certain fields pre-filled such as EE name, home address, last 4 digits of SSN, and Company information.</p>  <p><b>EMPLOYEE'S WITHHOLDING ALLOWANCE CERTIFICATE</b></p> <p>Complete this form so that your employer can withhold the correct California state income tax from your paycheck.</p> <p><b>Enter Personal Information</b></p> <table border="1"> <tr> <td>First, Middle, Last Name</td> <td>Social Security Number</td> </tr> <tr> <td>Address</td> <td>Filing Status</td> </tr> </table> <p>1. Total Number of Allowances you're claiming (Use Worksheet A for regular withholding allowances. Use other worksheets on the following pages as applicable, Worksheet A+B). 0</p> <p>2. Additional amount, if any, you want withheld each pay period (if employer agrees), (Worksheet B and C) OR</p> <p><b>Exemption from Withholding</b></p> <p>3. I claim exemption from withholding for 2020, and I certify I meet both of the conditions for exemption. OR Write "Exempt" here</p> <p>4. I certify under penalty of perjury that I am <b>not subject</b> to California withholding. I meet the conditions set forth under the Service Member Civil Relief Act, as amended by the Military Spouses Residency Relief Act. (Check box here)</p> <p>Under the penalties of perjury, I certify that the number of withholding allowances claimed on this certificate does not exceed the number to which I am entitled or, if claiming exemption from withholding, that I am entitled to claim the exempt status.</p> <p>Employee's Signature Date</p>	First, Middle, Last Name	Social Security Number	Address	Filing Status
First, Middle, Last Name	Social Security Number				
Address	Filing Status				
13.	<p>Notice the submit button is located at the TOP of page one. You will click on this icon once you have completed the form and are ready to finalize changes.</p>  <p><b>EMPLOYEE'S WITHHOLDING ALLOWANCE CERTIFICATE</b></p> <p>If you do not see the Submit button, close out the PDF, and ensure you reopen using <b>Adobe Acrobat Reader DC</b>.</p> <p>If you are still unable to see the Submit button, please print and complete a DE 4 form and submit to the Office of the Auditor-Controller, Payroll Division. You may also contact the Helpdesk for assistance.</p>				
14.	Complete the Employee's Withholding Allowance Certificate, following the instructions on the form.				
15.	<p><b>Filing Status: This is a required field</b></p> <p>Select your filing status from one of the options on the tax form.</p> <p>Filing Status</p> <p><input type="checkbox"/> SINGLE or MARRIED (with two or more incomes)</p> <p><input type="checkbox"/> MARRIED (one income)</p> <p><input type="checkbox"/> HEAD OF HOUSEHOLD</p>				

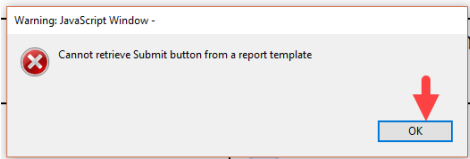
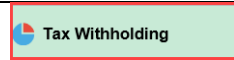
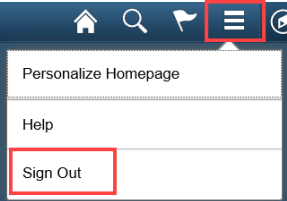


Step	Action
16.	<div><div><div>Allowances:</div><div>If you are claiming allowances for CA State, follow the instructions and enter the values in the Worksheets sections.</div><div><div>1. Total Number of Allowances you're claiming (Use Worksheet A for regular withholding allowances. Use other worksheets on the following pages as applicable, Worksheet A+B).</div><div>0</div></div><div>Note: You will not be able to enter a number directly onto line 1. The form sums the values as entered from worksheets A and B. Example shown below.</div></div></div>
17.	<div>As you enter each value for allowances, hit 'Tab' on your keyboard to proceed to the next field and to update the total number for line 1.</div>
18.	<div><div>Example – Worksheet A</div><div><div>WORKSHEET A</div><div>REGULAR WITHHOLDING ALLOWANCES</div><div><div><div>(A) Allowance for yourself — enter 1</div><div>(A) 1</div></div><div><div>(B) Allowance for your spouse (if not separately claimed by your spouse) — enter 1</div><div>(B) 1</div></div><div><div>(C) Allowance for blindness — yourself — enter 1</div><div>(C) 0</div></div><div><div>(D) Allowance for blindness — your spouse (if not separately claimed by your spouse) — enter 1</div><div>(D) 0</div></div><div><div>(E) Allowance(s) for dependent(s) — do not include yourself or your spouse</div><div>(E) 3</div></div><div><div>(F) Total — add lines (A) through (E) above and enter on line 1 of the DE 4</div><div>(F) 5</div></div></div></div><div><div>Example – Worksheet B</div><div><div>WORKSHEET B</div><div>ESTIMATED DEDUCTIONS</div><div>Use this worksheet only if you plan to itemize deductions, claim certain adjustments to income, or have a large amount of nonwage income not subject to withholding.</div><div><div><div>1. Enter an estimate of your itemized deductions for California taxes for this tax year as listed in the schedules in the FTB Form 540</div><div>1. 12,000.00</div></div><div><div>2. Enter \$9,074 if married filing joint with two or more allowances, unmarried head of household, or qualifying widow(er) with dependent(s) or \$4,537 if single or married filing separately, dual income married, or married with multiple employers</div><div>2. 9074</div></div><div><div>3. Subtract line 2 from line 1, enter difference</div><div>3. 2,926.00</div></div><div><div>4. Enter an estimate of your adjustments to income (alimony payments, IRA deposits)</div><div>4.</div></div><div><div>5. Add line 4 to line 3, enter sum</div><div>5. 2,926.00</div></div><div><div>6. Enter an estimate of your nonwage income (dividends, interest income, alimony receipts)</div><div>6. 2,000.00</div></div><div><div>7. If line 5 is greater than line 6 (if less, see below [go to line 9]); Subtract line 6 from line 5, enter difference</div><div>7. 926.00</div></div><div><div>8. Divide the amount on line 7 by \$1,000, round any fraction to the nearest whole number</div><div>8. 1</div></div><div><div>9. If line 6 is greater than line 5; Enter amount from line 6 (nonwage income)</div><div>9.</div></div><div><div>10. Enter amount from line 5 (deductions)</div><div>10.</div></div><div><div>11. Subtract line 10 from line 9, enter difference</div><div>11.</div></div></div></div><div>The values shown here are for sample purposes only. Please complete form as applicable to your own tax situation.</div></div></div>
19.	<div><div>Additional withholding:</div><div>Complete line 2 if you wish to have an additional amount withheld each pay period.</div></div>



Step	Action
	<p>2. Additional amount, if any, you want withheld each pay period (if employer agrees), (Worksheet B and C) <input type="text"/></p> <p>OR</p>
20.	<p><b>Please note:</b></p> <ul style="list-style-type: none"> <li>- Online Form DE 4 entry limits additional amount to \$999.00.</li> <li>- Worksheet B (lines 9-11) and Worksheet C for claiming greater amount are not available fields for online entry.</li> </ul> <p>Submit DE 4 form to the Office of the Auditor-Controller, Payroll Division if you cannot complete online.</p>
21.	<p><b>Exemption from Withholding:</b></p> <p>If you wish to claim EXEMPT for California State taxes, skip DE 4 form lines 1 and 2 and proceed to section Exemption from Withholding.</p> <p>Make <b>only one selection</b> under the Exemption from Withholding options, if you meet the conditions on the form.</p> <div style="border: 1px solid orange; padding: 10px;"> <p><b>Exemption from Withholding</b></p> <p>3. I claim exemption from withholding for 2020, and I certify I meet both of the conditions for exemption. <input type="text"/> Write "Exempt" here</p> <p>OR</p> <p>4. I certify under penalty of perjury that I am <b>not subject</b> to California withholding. I meet the conditions set forth under the Service Member Civil Relief Act, as amended by the Military Spouses Residency Relief Act. (Check box here) <input type="checkbox"/></p> </div>
22.	<p>Once you have completed the DE 4 form, click on the <b>Submit</b> button on the <b>TOP of page one</b>.</p> <div style="border: 1px solid black; padding: 10px;">  </div>
23.	<p>After you click on 'Submit', the system will prompt you to enter your PeopleSoft User ID (5 digit employee ID) and password.</p> <div style="border: 1px solid gray; padding: 10px;">  </div>
24.	<p>The system validates the logon credentials and updates the database. This will take a few seconds to process.</p> <p>Depending on your browser, you may receive a couple pop up messages:</p>



Step	Action
	
25.	<p>The system displays a new PDF file with a <b>confirmation message</b> indicating your changes have been processed, along with a copy of your submitted form and additional information.</p> <p>If the submission is unsuccessful, an error message will be displayed on the PDF, indicating reason for error. Employee must close out of all PDF forms, and reopen a new form, correct any errors previously entered and resubmit.</p> <div><p><i>The changes you have made to your Employee Withholding Allowance Certificate have been successfully submitted on 2020-08-20. You can scroll to the next page to view your saved data or print/save a copy of this document for your records.</i></p><p><i>Please be advised when you close this document the original PDF document remains open for your reference. To exit the application process, you will need to close both the original and the updated PDF documents.</i></p><p><i>If you need to make additional changes, you must navigate back to the Tax Withholding Forms page and begin the process again.</i></p><p><i>To see your tax updated changes you must click on 'Tax Withholding' under 'Employee Self Service'.</i></p></div>
26.	<p>Return to the Tax Withholding page, by closing out all PDF tax forms.</p> <p>Save your PDF tax forms to your computer, as needed.</p>
27.	<p>To see your updated tax changes, refresh the page by clicking on </p>
28.	<p>If you wish to make another payroll update from Employee Self Service, proceed to navigate to the appropriate menu option.</p>
29.	<p>If you are completed with your changes, log out of PeopleSoft, by clicking on the menu bar on the top right of page, and selecting <b>Sign Out</b>.</p> 

End of Procedure.