

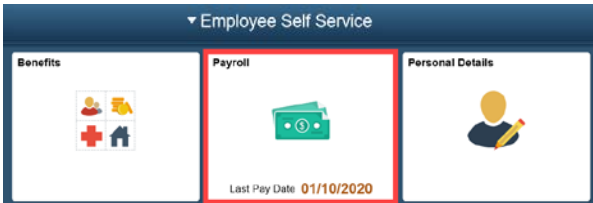

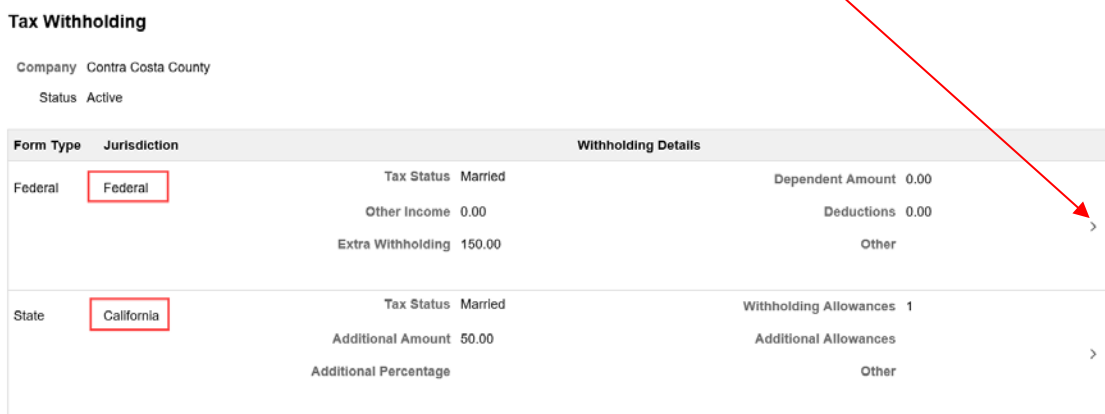


Updating Federal (W-4) Tax Withholding

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](#)


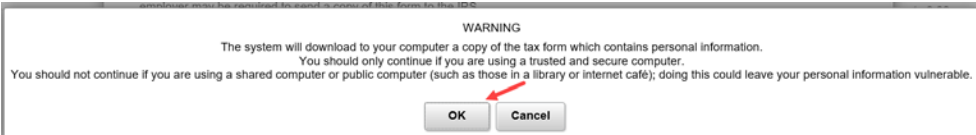
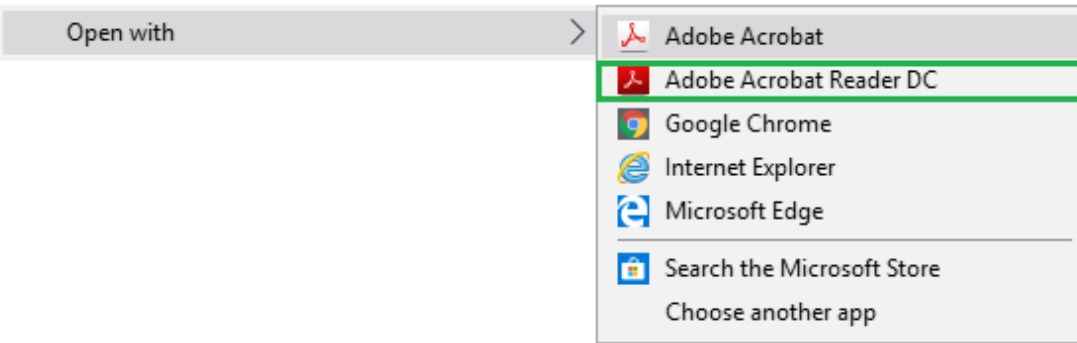
Instructions:

Step	Action
1.	Login in to Employee Self Service, and click on the Payroll Tile. 
2.	Access the Tax Withholding panel to review or update your tax withholding elections. 
3.	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. 

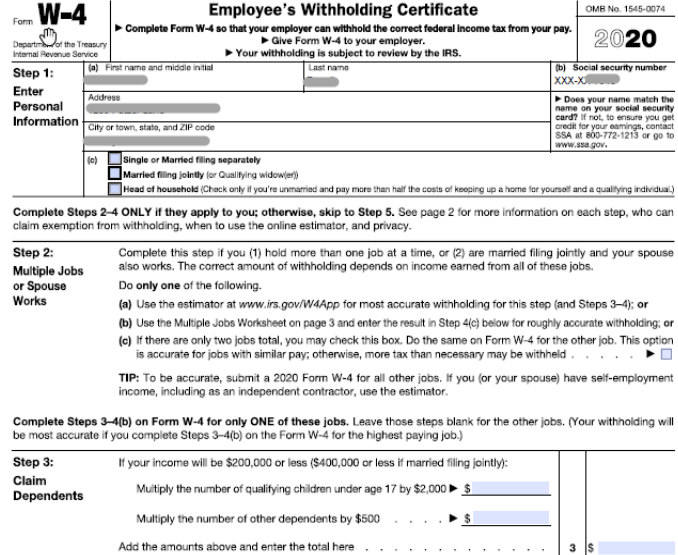
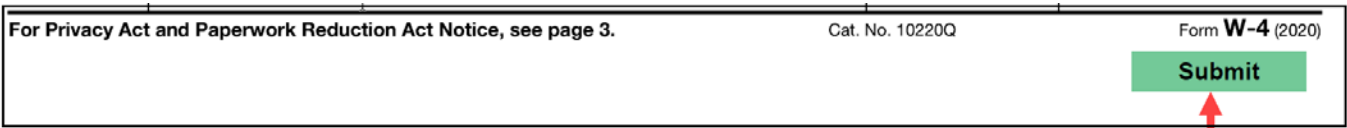
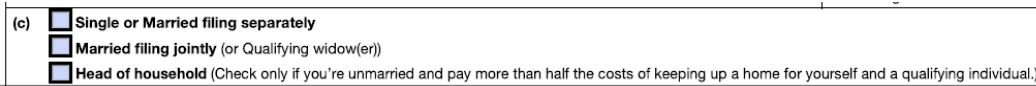


Step	Action																												
4.	<p>Each tax jurisdiction is separate, and will display your current tax withholding elections under Withholding Details.</p> <div><p>Tax Withholding</p><p>Company Contra Costa County</p><p>Status Active</p><table><thead><tr><th>Form Type</th><th>Jurisdiction</th><th colspan="2">Withholding Details</th></tr></thead><tbody><tr><td>Federal</td><td>Federal</td><td>Tax Status Married</td><td>Dependent Amount 2000.00</td></tr><tr><td></td><td></td><td>Other Income 0.00</td><td>Deductions 0.00</td></tr><tr><td></td><td></td><td>Extra Withholding 0.00</td><td>Other Multiple Jobs/Spouse Works</td></tr><tr><td>State</td><td>California</td><td>Tax Status Single</td><td>Withholding Allowances 1</td></tr><tr><td></td><td></td><td>Additional Amount 0.00</td><td>Additional Allowances</td></tr><tr><td></td><td></td><td>Additional Percentage</td><td>Other</td></tr></tbody></table></div>	Form Type	Jurisdiction	Withholding Details		Federal	Federal	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	Tax Status Single	Withholding Allowances 1			Additional Amount 0.00	Additional Allowances			Additional Percentage	Other
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		Additional Percentage	Other																										
5.	<p>To update your Federal Tax Withholding, select Federal jurisdiction. For instructions on updating your California State Taxes, refer to the State Tax Withholding Job Aid under epay.</p> <div><table><thead><tr><th>Form Type</th><th>Jurisdiction</th></tr></thead><tbody><tr><td>Federal</td><td>Federal</td></tr><tr><td>State</td><td>California</td></tr></tbody></table></div>	Form Type	Jurisdiction	Federal	Federal	State	California																						
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6.	<p>The Federal Tax Withholding Forms page appears.</p> <div><p>Federal Tax Withholding Forms</p><p>Company Contra Costa County</p><p>You must complete Form W-4 so the Payroll Department can calculate the correct amount of tax to withhold from your pay. Federal income tax is withheld from your wages based on the marital status and your entries for steps 2 through 4 on Form W-4. You may also specify that an additional dollar amount of tax be withheld. You can file a new Form W-4 any time your tax situation changes and you choose to have more, or less, tax withheld.</p><p>You can make changes online using the downloaded updatable 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>Updateable Forms</p><table><thead><tr><th>Form Description</th></tr></thead><tbody><tr><td>W-4 Employee's Withholding Certificate</td></tr></tbody></table></div>	Form Description	W-4 Employee's Withholding 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 W-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 save the file to your computer. Do not click Open.</p> <p><u>You will first need to click on 'Save', 'Open with', and select Adobe Reader. Only Save if you are using your own trusted computer device. Adobe Acrobat Reader DC must be installed on your PC).</u></p> <p>Locate the file saved on your computer and right click to see options for opening the file. See below. Always use Adobe Acrobat Reader 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>


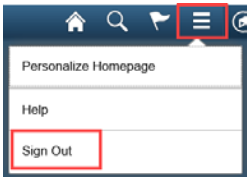


Step	Action
	If the browser does not prompt the employee to open the file, employee can open it manually.
11.	The updateable Form W-4 will appear your screen. Only page one of online tax form W-4 is fillable. All other pages are to be used for employee reference and calculation.
12.	<p>The online Form W-4 will have certain fields pre-filled such as EE name, home address, last 4 digits of SSN, and Company information.</p> 
13.	<p>Notice the submit button is located at the BOTTOM of page one. You will click on this icon once you have completed the form and are ready to finalize changes.</p>  <p>If you do not see the Submit button, close out the pdf, and ensure you reopen using Adobe Acrobat Reader DC.</p> <p>If you are still unable to see the Submit button, please print and complete a W-4 form and submit to the Office of the Auditor-Controller, Payroll Division. You may also contact the Helpdesk for assistance.</p>
14.	Review the instructions on the form.
15.	<p>Filing Status: This is a required field.</p> <p>Complete Step 1c of Form W-4, by indicating your filing (marital) status.</p> 
16.	Steps 2 through 4 are optional: Employees should complete Steps 2, 3 and/or 4 if relevant to their personal tax situations. These steps show adjustments that will affect the withholding calculation.



Step	Action
	Please read the instructions on the form for each section.
17.	<p>EXEMPT from Withholding</p> <p>If you wish to claim EXEMPT from federal income tax withholding, and meet the conditions indicated on Form W-4:</p> <p>Using the dropdown under Step 4c, select Exempt. If you choose to claim exempt this means there will be no federal tax withholding from your paycheck.</p> <div><div>4(c) \$ <input type="text"/></div><div>Not Applicable</div><div>Not Applicable</div><div>Exempt</div></div> <p><i>Note: No adjustments or extra withholding are allowed when claiming exempt. If you have entered amounts in Steps 3-4, and have selected Exempt, you will receive an error message upon submission. Correct your errors, and resubmit for processing.</i></p>
18.	<p>Once you have completed the W- 4 form, click on the Submit button on the BOTTOM of page one.</p> <div>Submit</div>
19.	<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></div>
20.	<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> <div></div>



Step	Action
21.	<p>The system displays a new PDF file with a confirmation message 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, open 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 2020-06-20. 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>
22.	<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>
23.	<p>To see your updated changes, refresh the page by clicking on </p>
24.	<p>If you wish to make another payroll update from Employee Self Service, proceed to navigate to the appropriate menu option.</p>
25.	<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 Sign Out.</p> <div></div> <p style="text-align: right;">End of Procedure.</p>