

PeopleSoft Human Capital Management (HCM)

Employee Tax Withholding

Job Aid

Employee Self Service (ESS)

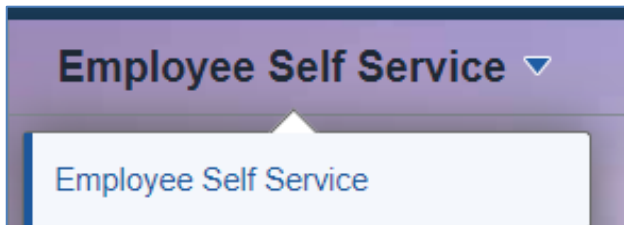
Employee Tax Withholding

Purpose

This guide will walk thru the steps for using the Employee Self Service W4/WH4 PDF Form. The form allows you to update your tax withholding status by yourself within PeopleSoft HCM. Please note, you will need at least Adobe Reader to perform this operation, the preferred browsers for this project are Edge and Chrome.

Employee Tax Withholding

1. **Navigate** to [Employee Self Service](#) at the top left of the homepage.

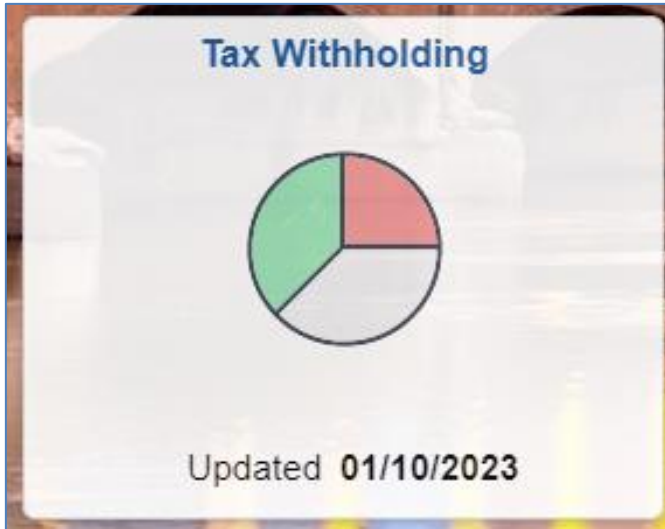


2. Next, **navigate** to the [Payroll](#) tile.



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3. Select the **Tax Withholding** tile.



4. The **Tax Withholding** page displays. On the page you will see information for **Federal Tax Withholding**, **State Tax Withholding**, and **Local Tax Withholding**.
5. Select the **Federal Withholding Details** by selecting the arrow on the right-hand side of the row.

Form Type	Jurisdiction	Withholding Details	
Federal	Federal	Tax Status Married	Dependent Amount 0.00
		Other Income 0.00	Deductions 0.00
		Extra Withholding 30.00	Other
State	Indiana	Tax Status Married	Withholding Allowances 2
		Additional Amount 0.00	Additional Allowances
		Additional Percentage	Other
		Other Allowances	
Local	HENDRICKS	Tax Status Married	Withholding Allowances 2
		Additional Amount	Additional Allowances
		Additional Percentage	Other
Local	MARION	Tax Status n/a	Withholding Allowances
		Additional Amount	Additional Allowances
		Additional Percentage	Other

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- The **Federal Tax Withholding Forms** page displays. In the **Updateable Forms** section, **select** the **Federal Withholding Allowance Certificate** arrow.

Federal Tax Withholding Forms

Company State of Indiana

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.

You can make changes 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.

Updateable Forms

Form Description
Federal Withholding Allowance Certificate >

- A warning message will pop up, review the message then **select OK** to proceed with downloading the W-4 PDF on your computer.

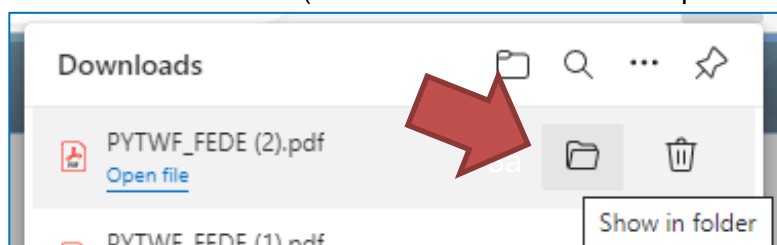
WARNING

The system will download to your computer a copy of the tax form which contains personal information. You should only continue if you are using a trusted and secure computer. You should not continue if you are using a shared computer or public computer (such as those in a library or internet café); doing this could leave your personal information vulnerable.

7 OK Cancel

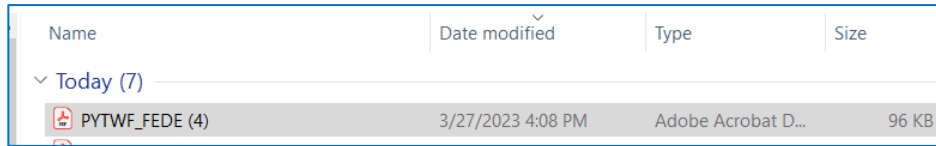
Note: To edit your W4 you need to enter it through the Adobe Application, NOT through a website. The steps below outline how to make sure you open it in the Application.

- Once you select OK, the downloads tab will appear on the right of your screen.
 - Click on the folder icon (DO NOT click on the PDF “open file” blue link)

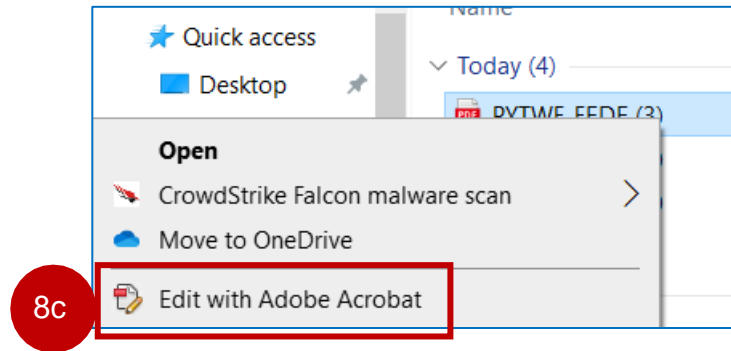


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- b. This prompt will open your downloads. Once the downloads folder opens, you 'right click' on the file



- c. Select edit with Adobe Acrobat.

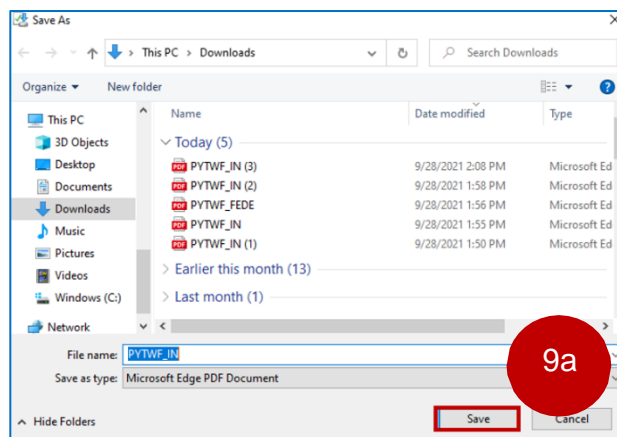


Step 9 is an alternative option if Step 8 does not work for you. Please skip to step 10 if step 8 worked.

9. Save the PDF (e.g. PYTWF_FEDE.pdf) in a location on your PC.

*Note: The downloaded PDF may also appear at the bottom of your web browser, however, **do NOT** use this option because the Submit option will NOT be available in a later step.*

- a. Use the **Save As** feature to rename file and save it to your preferred location.
b. Once you have used the **Save As** option, open the PDF file with Adobe Acrobat Reader DC and make your desired updates.



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10. Once the PDF opens you will notice that the fields in the form are now "fillable" and the green **Submit** button is available.
 - c. * You **must** select a status in **section c** to successfully Submit the form.
 - d. **Select** the green **Submit** button from within the PDF.
11. A security warning may display. Review the message and then **select Allow**.

Note: You may need to clear your cache prior to opening the Employee's Withholding Certificate.

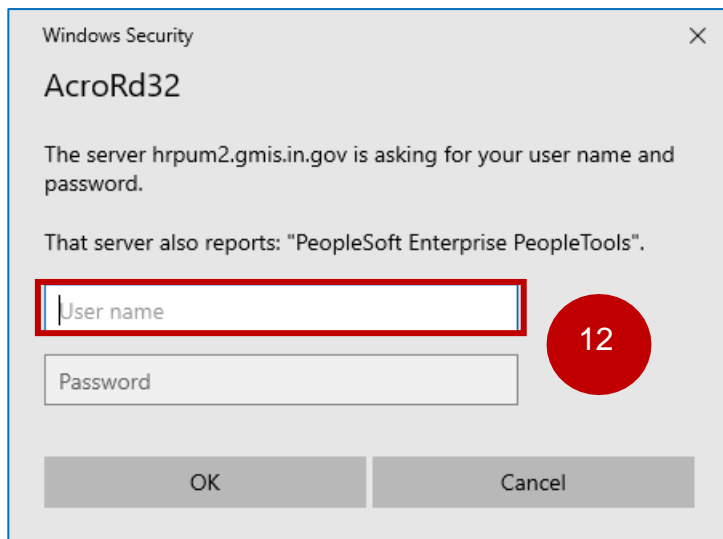
Form W-4		Employee's Withholding Certificate		OMB No. 1545-0074
Department of the Treasury Internal Revenue Service			Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Give Form W-4 to your employer. Your withholding is subject to review by the IRS.	
			2023	
Step 1: Enter Personal Information	(a) First name and middle initial [REDACTED]	Last name [REDACTED]	(b) Social security number [REDACTED]	
	Address [REDACTED]		Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to www.ssa.gov .	
	City or town, state, and ZIP code [REDACTED]			
	(c) <input type="checkbox"/> Single or Married filing separately <input type="checkbox"/> Married filing jointly or Qualifying surviving spouse <input type="checkbox"/> Head of household (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.)			
Complete Steps 2-4 ONLY if they apply to you; otherwise, skip to Step 5. See page 2 for more information on each step, who can claim exemption from withholding, other details, and privacy.				
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) Reserved for future use. (b) Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below; or (c) If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is generally more accurate than (b) if pay at the lower paying job is more than half of the pay at the higher paying job. Otherwise, (b) is more accurate <input type="checkbox"/>			
	TIP: If you have self-employment income, see page 2.			
Complete Steps 3-4(b) on Form W-4 for only ONE of these jobs. Leave those steps blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3-4(b) on the Form W-4 for the highest paying job.)				
Step 3: Claim Dependent and Other Credits	If your total income will be \$200,000 or less (\$400,000 or less if married filing jointly): Multiply the number of qualifying children under age 17 by \$2,000 \$ [REDACTED] Multiply the number of other dependents by \$500 \$ [REDACTED]			
	Add the amounts above for qualifying children and other dependents. You may add to this the amount of any other credits. Enter the total here		3 \$ [REDACTED]	
Step 4 (optional): Other Adjustments	(a) Other income (not from jobs). If you want tax withheld for other income you expect this year that won't have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income		4(a) \$ [REDACTED]	
	(b) Deductions. If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use the Deductions Worksheet on page 3 and enter the result here		4(b) \$ [REDACTED]	
	(c) Extra withholding. Enter any additional tax you want withheld each pay period		4(c) \$ [REDACTED]	
	Exemption from withholding. By claiming exemption from withholding, you certify that you owed no Federal income tax in 2022, and that you expect to owe no Federal income tax in 2023. If you claim exemption from withholding, no income tax will be withheld from your paycheck.			
Step 5: Sign Here	Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete. [REDACTED]		2023-04-13	
	Employee's signature (This form is not valid unless you sign it.)		Date	
Employers Only	Employer's name and address State of Indiana 200 W. Washington St. Indianapolis, IN 46204	First date of employment	Employer identification number (EIN) 356000158	
For Privacy Act and Paperwork Reduction Act Notice, see page 3. Cat. No. 10220Q Form W-4 (2023)				
Submit				

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12. Once you click the SUBMIT button, you will receive a pop up. You **must** enter your credentials to successfully submit the form.

Section 1: enter your username, your username is the 1st initial of your first name and the last 6 numbers of your PeopleSoft (also located on the back of your badge)

Section 2: enter your network password.



Windows Security

AcroRd32

The server hrpum2.gmis.in.gov is asking for your user name and password.

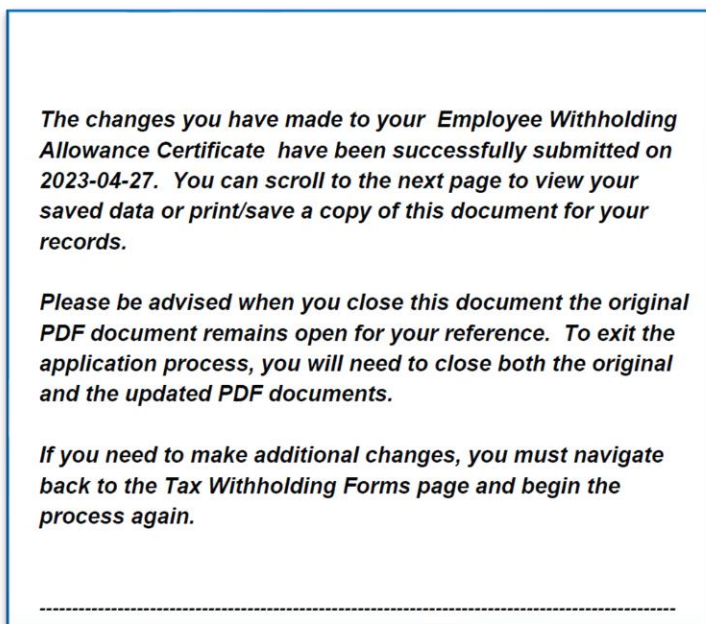
That server also reports: "PeopleSoft Enterprise PeopleTools".

User name

Password

OK Cancel

Once you select **ok**, you will receive a message that the form has been successfully submitted.



The changes you have made to your Employee Withholding Allowance Certificate have been successfully submitted on 2023-04-27. You can scroll to the next page to view your saved data or print/save a copy of this document for your records.

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.

If you need to make additional changes, you must navigate back to the Tax Withholding Forms page and begin the process again.

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13. Back in PeopleSoft, **select** the **State Withholding Details** by **selecting** the arrow on the right-hand side of the row.

Form Type	Jurisdiction	Withholding Details	
Federal	Federal	Tax Status Married Other Income 0.00 Extra Withholding 30.00	Dependent Amount 0.00 Deductions 0.00 Other
State	Indiana	Tax Status Married Additional Amount 0.00 Additional Percentage Other Allowances	Withholding Allowances 2 Additional Allowances Other
Local	HENDRICKS	Tax Status Married Additional Amount Additional Percentage	Withholding Allowances 2 Additional Allowances Other
Local	MARION	Tax Status n/a Additional Amount Additional Percentage	Withholding Allowances Additional Allowances Other

13. Select the **Indiana Withholding Allowance Certificate**

State Tax Withholding Forms

Company State of Indiana

You may complete Indiana Form 48845 so the Payroll Department can calculate the correct amount of tax to withhold from your pay. Indiana income tax is withheld from your wages based on what you claim on the Employee's Withholding Exemption Certificate and County Status Certificate (48845). You can file a new 48845 form anytime your tax situation changes.

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.

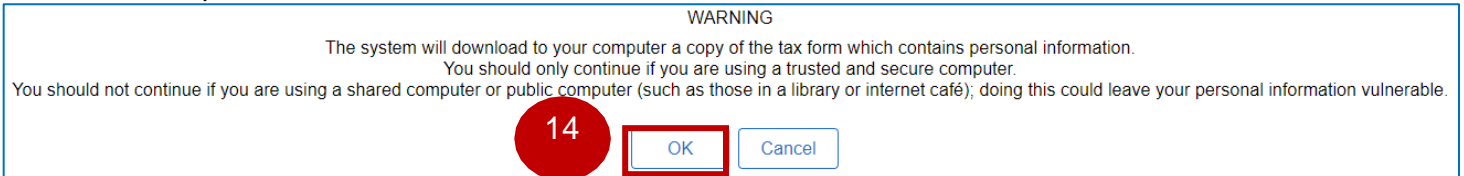
You can make changes to your withholding allowances online using the downloaded updateable PDF form and submit the changes for processing by your payroll department. Be sure to print or save a copy of the completed form for your records.

Updateable Forms

Form Description
Indiana Withholding Allowance Certificate

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14. A warning message will display. Review the message then **select OK** to proceed.

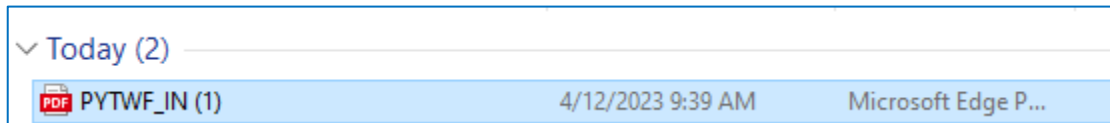


Note: To edit your WH4 you need to enter it through the Adobe Application, NOT through a website. The steps below outline how to make sure you open it in the Application.

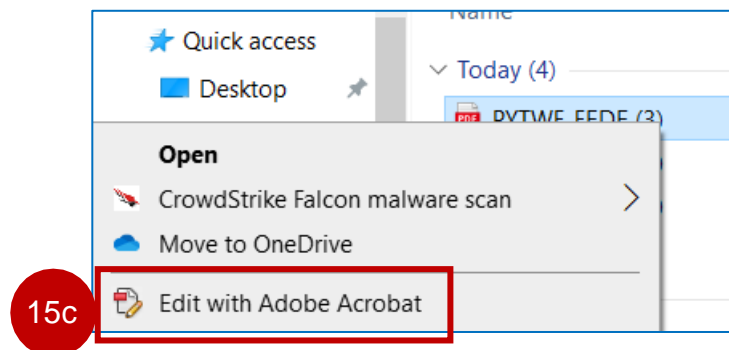
15. The downloads tab will appear on the right of your screen.
- Click on the folder icon (**DO NOT click on the PDF “open file” blue link**)



- This prompt will open your downloads. Once the downloads folder opens, you **‘right click’** on the file



- Select edit with Adobe Acrobat.



Step 16 is an alternative option if Step 15 does not work for you. Please skip to step 17 if step 15 worked.

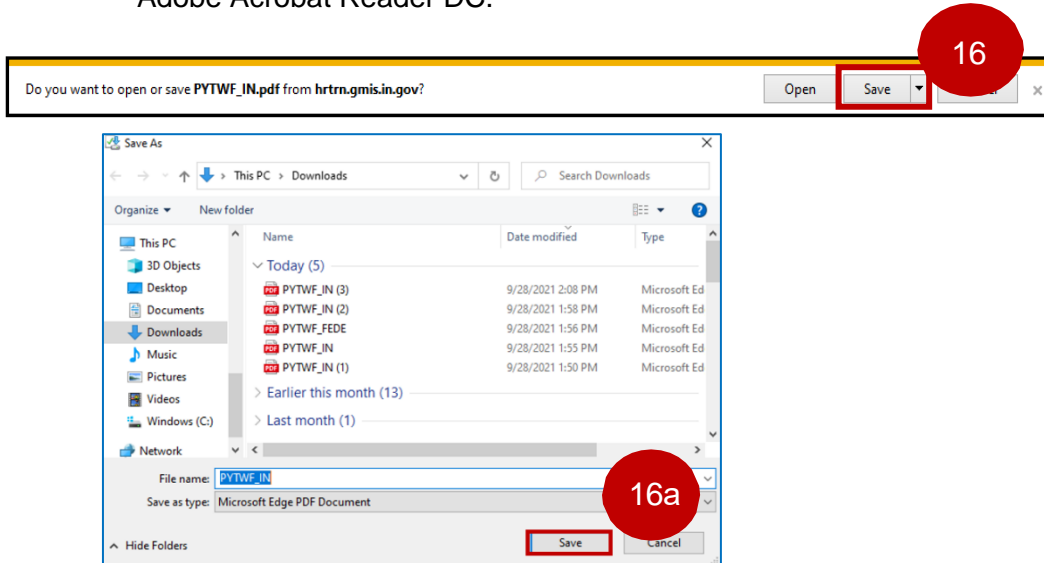
16. Save the PDF (e.g. PYTWF_IN.pdf) in a location on your PC.

Note: The downloaded PDF may also appear at the bottom of your web browser, however, do NOT use this option because the Submit option will NOT be available in a later step.

- Use the **Save As** feature to rename file and save it to your preferred location.

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- b. Once you have used the **Save As** option, open the PDF file with Adobe Acrobat Reader DC.

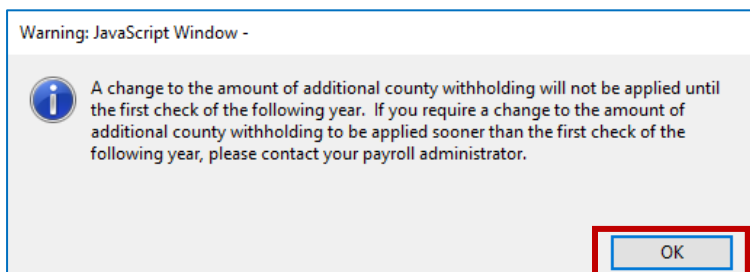


17. Once the PDF opens you notice that the fields in the form are now "fillable" and the green **Submit** button is available.

Note: You may need to clear your cache prior to opening the Employee's Withholding Certificate.

18. * You **must** select a County of residence and County of employment to successfully submit the form. **(Please remember to select your county of residence in which you resided as of January 1).**

19. Please note if you choose an additional County withholding amount in line 9 you will receive a warning message, you can bypass this message by selecting **OK** and continue to enter the withholding amount.



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20. When finished making desired updates, **select** the green **Submit** button from within the PDF.

21. A security warning may display. Review the message and then **select Allow**.

State of Indiana
Form WH-4
State Form 48846
(R8 / 9-22)

Employee's Withholding Exemption and County Status Certificate
This form is for the employer's records. Do not send this form to the Department of Revenue.
The completed form should be returned to your employer.

Full Name: [Redacted] Social Security Number or ITIN: [Redacted]
Home Address: [Redacted] City: [Redacted] State: [Redacted] ZIP Code: [Redacted]

Indiana County of Residence as of January 1: **None** (See instructions)
Indiana County of Principal Employment as of January 1: **None** (See instructions)

How to Claim Your Withholding Exemptions

- You are entitled to one exemption. If you wish to claim the exemption, enter "1" [Redacted]
Nonresident aliens must skip lines 2 through 7. See instructions
- If you are married and your spouse does not claim his/her exemption, you may claim it, enter "1"..... [Redacted]
- You are allowed one (1) exemption for each dependent. Enter number claimed..... [Redacted]
- Additional exemptions are allowed if: (a) you and/or your spouse are over the age of 65 and/or (b) if you and/or your spouse are legally blind.
Check box(es) for additional exemptions: You are 65 or older or blind Spouse is 65 or older or blind
Enter the total number of boxes checked..... [Redacted] 0
- Add lines 1, 2, 3, and 4. Enter the total here [Redacted] 0
- You are entitled to claim an additional exemption for each qualifying dependent (see instructions)..... [Redacted]
- You are entitled to claim an additional exemption for each adopted qualifying dependent (see instructions)..... [Redacted]
- Enter the amount of additional state withholding (if any) you want withheld each pay period \$ [Redacted]
- Enter the amount of additional county withholding (if any) you want withheld each pay period..... \$ [Redacted]

I hereby declare that to the best of my knowledge the above statements are true.
Signature: [Redacted] Date: 2023-04-13

Submit

12. Once you click the **SUBMIT** button, you will receive a pop up. You **must** enter your credentials to successfully submit the form.

Section 1: enter your username, your username is the 1st initial of your first name and the last 6 numbers of your PeopleSoft number (also located on the back of your badge)

Section 2: enter your network password.

12

Windows Security

AcroRd32

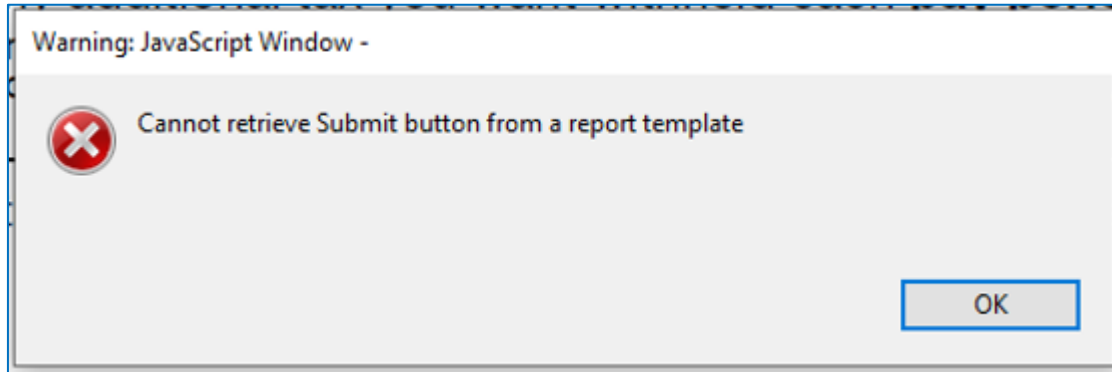
The server hrpum2.gmis.in.gov is asking for your user name and password.
That server also reports: "PeopleSoft Enterprise PeopleTools".

User name [Redacted]
Password [Redacted]

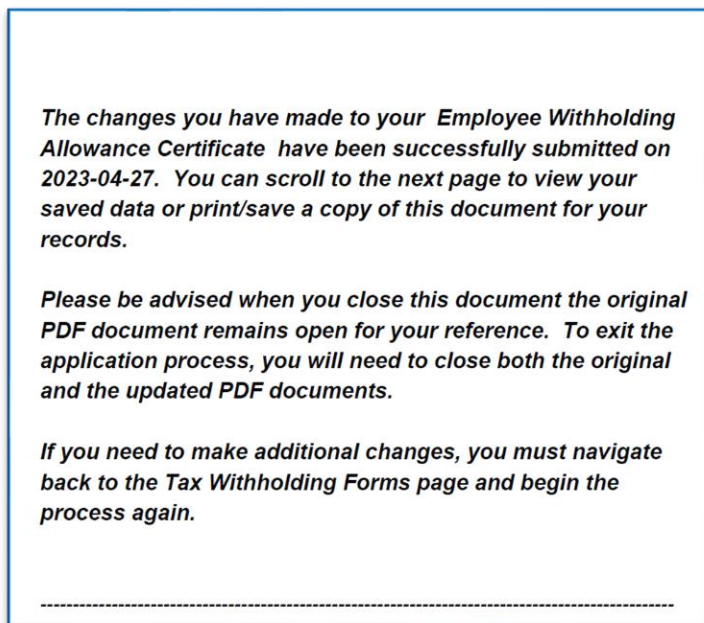
OK Cancel

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If you receive the following message when submitting your form, select **OK** and your form will be submitted.



Once you select **ok**, you will receive a message that the form has been successfully submitted.



End of procedure.



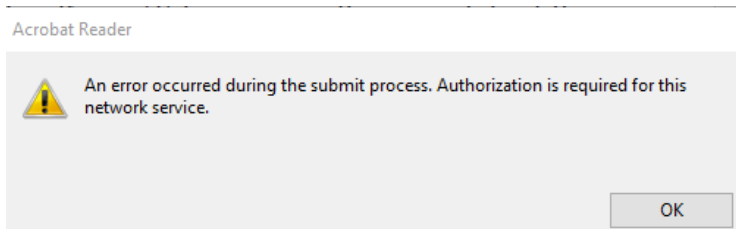
Indiana Auditor of State
Tera Klutz, CPA

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Directions to Prevent Tax Form Errors

You will need to have Adobe Reader access to successfully submit tax forms; submit an IOT ticket if you do not have Adobe Reader.

Error message: Authorization is required



There are 2 possible reasons employees are getting these errors.

- Error 1: The preferred email address is not updated.
- Error 2: The credentials are entered incorrectly.

ERROR 1

Agency Payroll Instructions:

You can rule out Error 1 by verifying the email address on file under Modify a Person (Navigation: Menu>Workforce Administrator>Personal Information>Modify a Person)

Under the Contact Information tab, you can view the employee's email addresses. If the employee does NOT have an Active Directory¹ ("AD") email address on file – STOP. The employee cannot submit electronic forms; the employee must submit a paper form.

If your agency determines the employee should have an AD email address but does not have one listed, you can submit an IOT ticket with the request.

If the employee DOES have an AD email address on file, make sure it is selected as the preferred email address. If the AD email address is not selected as the preferred email address, the employee will need to update their preferred email address.

Employee Instructions:

Update your preferred email address:

1. Log into Employee Self-Service within your HCM homepage
2. Select the Personal Details tile
3. Select the Contact Details tile
4. Under email address, select the state AD email address and check the preferred box/save
5. Log out and log back in before attempting to submit tax forms again

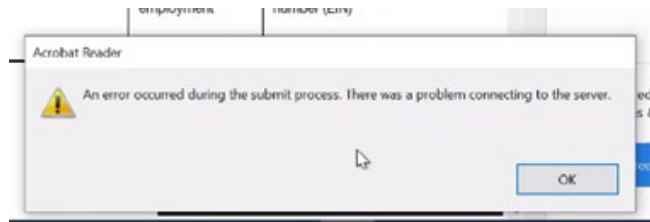
ERROR 2

Login credentials error

- Username: 1st initial of your 1st name and last 6 of your PeopleSoft number ex: J123456
- Password: Your network password

If errors continue after following the above steps, please reach out to AOS payroll at Payrolldept@auditor.in.gov for further assistance.

Error message: Connecting to the server



If employees are getting the above error message, instruct the employees to submit a paper form. The form must be a hard copy and display the employees' signature, we cannot accept the ESS electronic version (with the submit button).

Error message: Submit button is not on the form

If the SUBMIT button is not on the form, the form was not downloaded correctly. Refer to job aid [Payroll-03-Complete Tax Forms W-4 and WH-4](#) for step-by-step instructions.



Indiana Auditor of State Tera Klutz, CPA

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If further errors occur after following the job aid, reach out to AOS payroll at Payrolldept@auditor.in.gov for further guidance.

Error message: Additional county withholding

When an employee selects the additional county withholding section in the WH-4 form, the below message will pop up. The employees can continue by bypassing this message by selecting ok. Your additional county withholding will be updated.

Warning: JavaScript Window -



A change to the amount of additional county withholding will not be applied until the first check of the following year. If you require a change to the amount of additional county withholding to be applied sooner than the first check of the following year, please contact your payroll administrator.

OK

If further issues occur, you can contact AOS payroll at Payrolldept@auditor.in.gov for guidance.

Verifying Employee Tax Entries

Agency Payroll can verify employees' tax entries following the below navigation:

- Navigator
- Menu
- Payroll for North America
- Employee Pay Data USA
- Tax Information
- Update Employee Tax Data

ⁱ The Active Directory includes all employee email addresses within the state network. There are several offices who are not part of the state network and therefore, their employees' email addresses would not be included.