

## Job Aid: HR-29 Employee Self Service-W4

Last Update: 7/26/22



## Document Version History

Date	Version #	Comments
07/26/2022	<b>1.0</b>	<b>Initial Version</b>

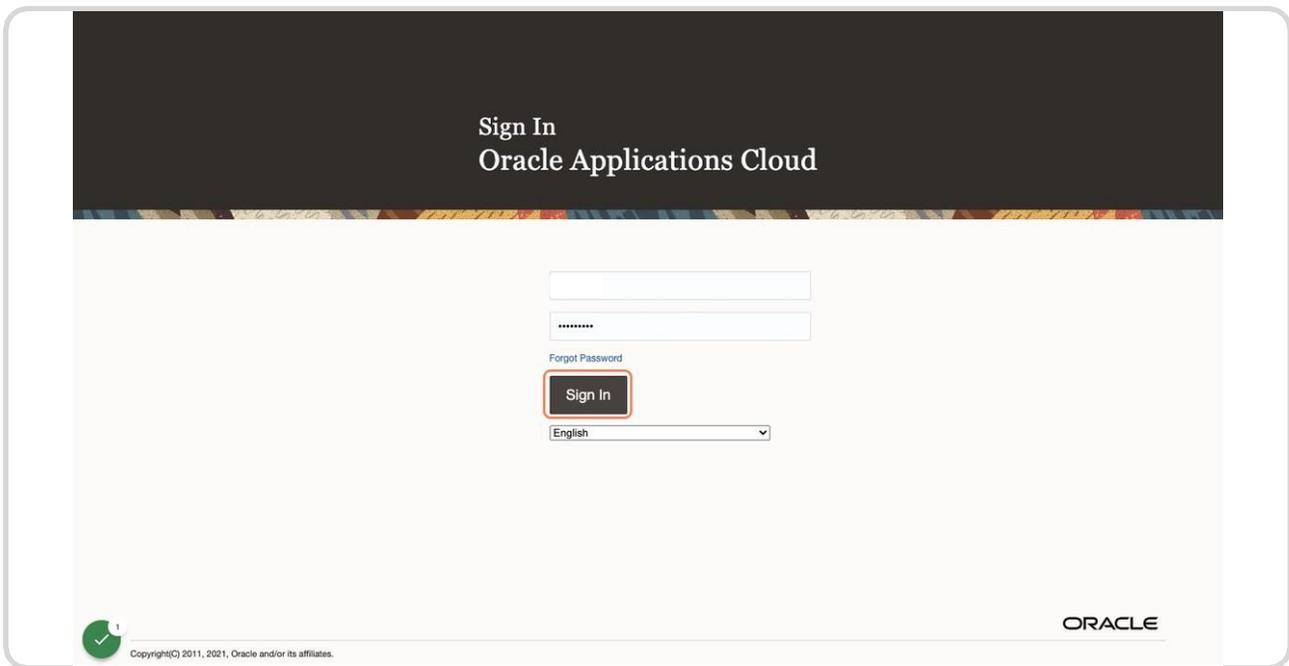
## Pre-Requisites/ Job Descriptions

**This job aid is applicable to the following Oracle Cloud job descriptions:**

ID	Description
1.	Employee

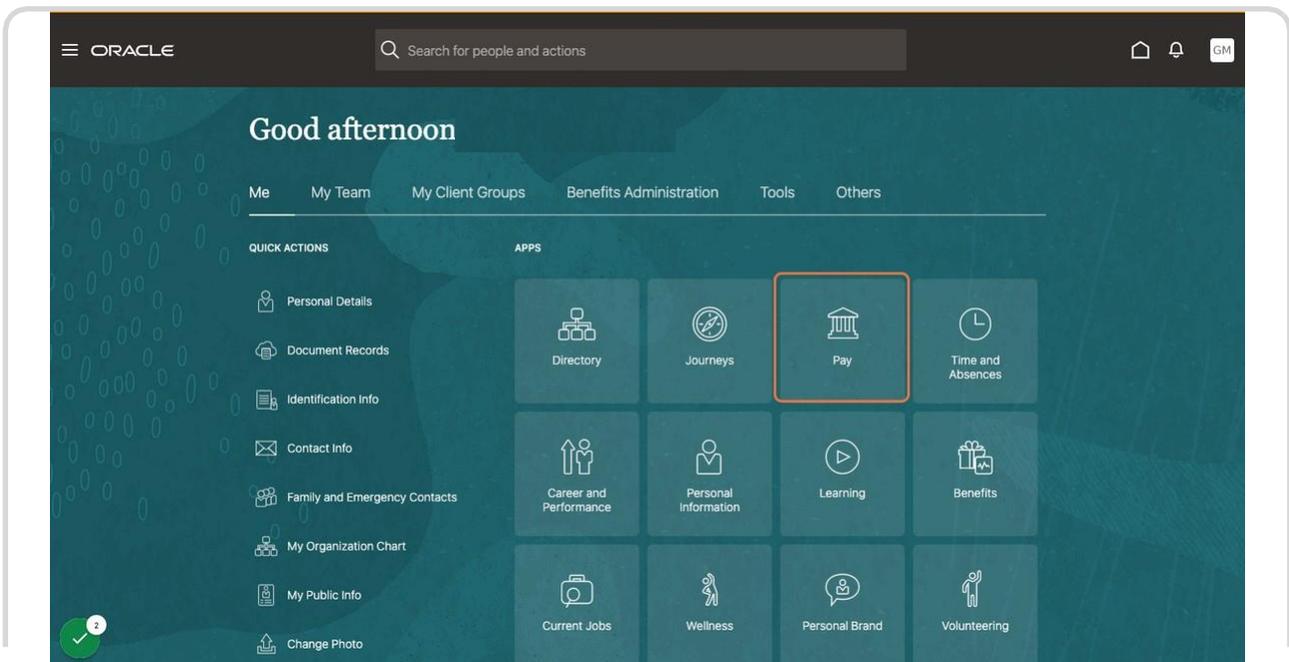
STEP 1

Click on “Sign In”



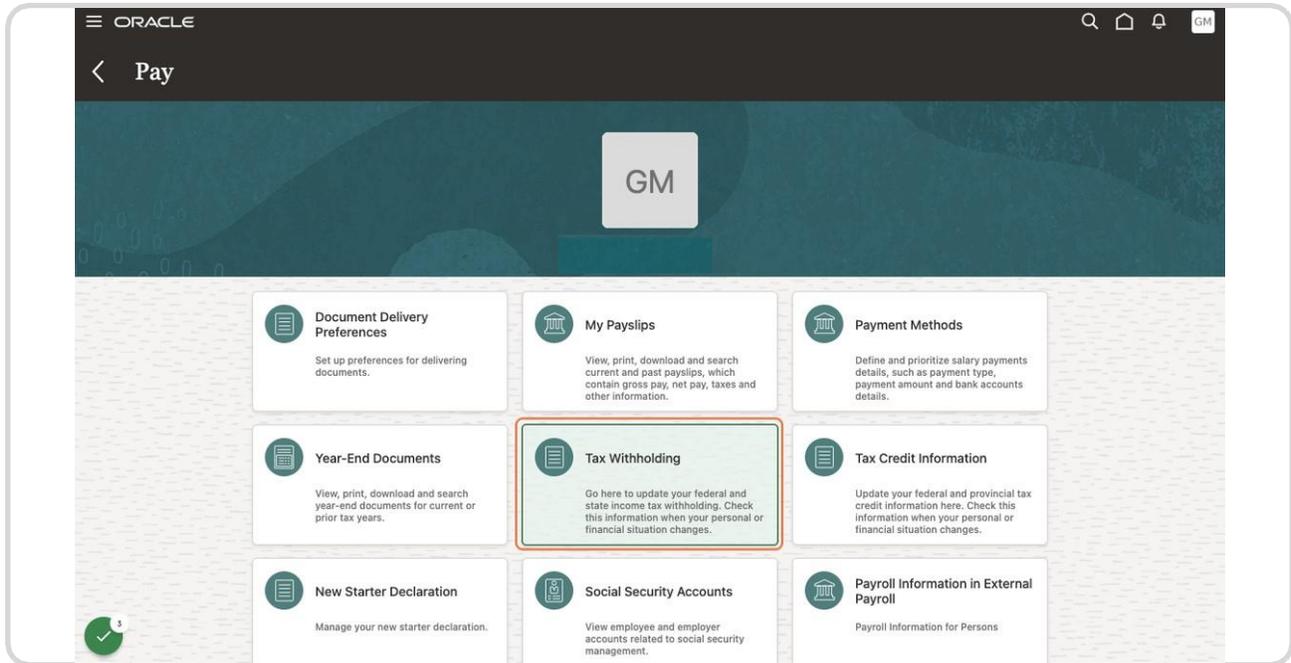
STEP 2

Under Me, click on the tile “Pay”



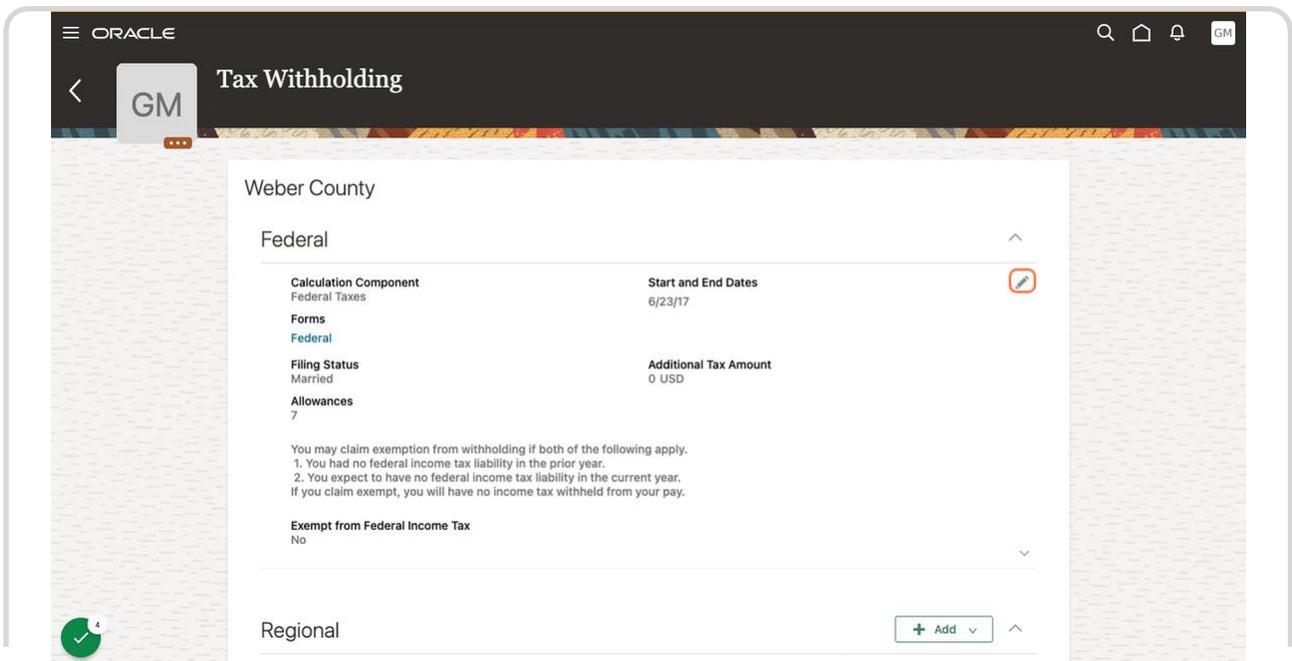
STEP 3

Click on the tile “Tax Withholding”



STEP 4

Under Federal section, click on Pencil symbol to edit.



STEP 5

Click on Date Selector to select when this change is to start

The screenshot shows the Oracle HR Self Service interface for 'Federal Taxes'. The 'Basic Information' section includes 'Calculation Component' (Federal Taxes), 'Component Sequence' (1), and a date field for 'When does this change start?' with the value '6/6/22'. A red circle highlights the date field, and a small icon next to it indicates a date selector. The 'Withholding Status' section includes 'Filing Status' (Select a value), 'Multiple Jobs' (Select a value), 'Exempt from Federal Income Tax' (No), and 'Qualifying Dependents Amount' (0 USD). The 'Forms' section shows 'Federal'. A green checkmark icon is visible in the bottom left corner.

STEP 6

Select the date when you want the change to start on the system.

The screenshot shows the same Oracle HR Self Service interface as in Step 5, but with a date selector calendar open over the 'When does this change start?' field. The calendar is for June 2022, and the date '6' is selected. The rest of the form fields and layout are identical to the previous screenshot.

### STEP 7

## Select the Filing Status Drop down arrow

The screenshot shows the Oracle Federal Taxes form. The 'Filing Status' dropdown menu is open, displaying options: 'Select a value', 'Head of household', 'Married filing jointly or Qualifying widow(er)', and 'Single or Married filing separately'. A red box highlights the dropdown arrow. The form includes sections for 'Basic Information' (Calculation Component: Federal Taxes, Component Sequence: 1, Start Date: 6/6/22) and 'Withholding Status' (Extra Withholding: 0 USD, Other Income Amount: 0 USD). Buttons for 'Save and Close' and 'Cancel' are visible at the top right.

### STEP 8

## Select the "Filing Status" that is appropriate for you. In this example, the option 'Married Filing Jointly' is chosen

This screenshot shows the same Oracle Federal Taxes form as in Step 7, but with the 'Married filing jointly or Qualifying widow(er)' option selected in the 'Filing Status' dropdown menu. The dropdown menu is still open, and the selected option is highlighted with an orange box. The rest of the form, including the 'Basic Information' and 'Withholding Status' sections, remains the same. The 'Save and Close' and 'Cancel' buttons are still present at the top right.

STEP 9

Select the “Multiple Jobs” dropdown arrow

The screenshot shows the 'Federal Taxes' form with the 'Multiple Jobs' dropdown menu open. The dropdown menu has 'No' selected, which is highlighted with a red box. The form includes fields for 'When does this change start?' (6/8/22), 'Filing Status' (Married filing jointly or Qualifying widow(er)), 'Extra Withholding' (0 USD), 'Exempt from Federal Income Tax' (No), 'Qualifying Dependents Amount' (0 USD), 'Other Dependents Amount' (0 USD), 'Other Income Amount' (0 USD), and 'Deductions Amount' (0 USD). A green checkmark icon is visible in the bottom left corner.

STEP 10

Select 'No' from the dropdown unless you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works

The screenshot shows the 'Federal Taxes' form with the 'Multiple Jobs' dropdown menu open. The 'No' option is selected and highlighted with a red box. The form includes fields for 'When does this change start?' (6/8/22), 'Filing Status' (Married filing jointly or Qualifying widow(er)), 'Extra Withholding' (0 USD), 'Exempt from Federal Income Tax' (No), 'Qualifying Dependents Amount' (0 USD), 'Other Dependents Amount' (0 USD), 'Other Income Amount' (0 USD), and 'Deductions Amount' (0 USD). A green checkmark icon is visible in the bottom left corner.

STEP 11

Select "Exempt from Federal Income Tax" dropdown arrow.

The screenshot shows the 'Federal Taxes' form with the 'Exempt from Federal Income Tax' dropdown menu open. The 'No' option is highlighted, and a red box is drawn around the dropdown arrow. The form includes fields for 'When does this change start?' (6/6/22), 'Filing Status' (Married filing jointly or Qualifying widow(er)), 'Multiple Jobs' (No), 'Extra Withholding' (0 USD), 'Other Income Amount' (0 USD), 'Deductions Amount' (0 USD), and 'Total Dependents Amount' (0 USD). A green checkmark icon is visible in the bottom left corner.

STEP 12

Select "No" unless you qualify for exempt status criteria listed above.

The screenshot shows the 'Federal Taxes' form with the 'Exempt from Federal Income Tax' dropdown menu open. The 'No' option is highlighted with a red box. The form includes fields for 'When does this change start?' (6/6/22), 'Filing Status' (Married filing jointly or Qualifying widow(er)), 'Multiple Jobs' (No), 'Extra Withholding' (0 USD), 'Other Income Amount' (0 USD), 'Deductions Amount' (0 USD), and 'Total Dependents Amount' (0 USD). A green checkmark icon is visible in the bottom left corner.

STEP 13

Enter amount value in “Extra Withholding” field for any additional tax you want withheld each pay period

The screenshot shows the 'Federal Taxes' form. At the top, there are buttons for 'Delete', 'Save and Close', and 'Cancel'. Below the title, there is a date field for 'When does this change start?' with the value '6/6/22'. The 'Withholding Status' section includes a dropdown for 'Filing Status' (Married filing jointly or Qualifying widow(er)), a dropdown for 'Multiple Jobs' (No), and an 'Exempt from Federal Income Tax' dropdown (No). The 'Extra Withholding' field is highlighted with an orange box and contains the value '500 USD'. Below this are fields for 'Qualifying Dependents Amount', 'Other Dependents Amount', 'Total Dependents Amount', 'Other Income Amount', and 'Deductions Amount', all with a value of '0 USD'. At the bottom, there is a declaration: '\*Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.' with a checked 'I agree' checkbox.

STEP 14

If your income will be \$200,000 or less (\$4,000 or less if married filing jointly): Multiply the number of qualifying children under age 17 by \$2,000; Multiply the number of other dependents by \$500. Add the dollar amounts above and enter the total amount here. Above dollars should be added in the yellow highlighted box in the below screenshot.

The screenshot shows the 'Federal Taxes' form. At the top, there are buttons for 'Delete', 'Save and Close', and 'Cancel'. Below the title, there is a date field for 'When does this change start?' with the value '6/6/22'. The 'Withholding Status' section includes a dropdown for 'Filing Status' (Married filing jointly or Qualifying widow(er)), a dropdown for 'Multiple Jobs' (No), and an 'Exempt from Federal Income Tax' dropdown (No). The 'Extra Withholding' field contains the value '500 USD'. The 'Qualifying Dependents Amount' field is highlighted with a yellow box and contains the value '0 USD'. Below this are fields for 'Other Dependents Amount', 'Total Dependents Amount', 'Other Income Amount', and 'Deductions Amount', all with a value of '0 USD'. At the bottom, there is a declaration: '\*Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.' with a checked 'I agree' checkbox.

STEP 15

Workers can fill in the amount details in other fields, and then the 'Total Dependent amount' in the bottom.

The screenshot shows the 'Federal Taxes' form with the following fields and values:

- When does this change start?**: 6/6/22
- Withholding Status**:
  - \*Filing Status**: Married filing jointly or Qualifying widow(er)
  - Extra Withholding**: 500 USD
  - Multiple Jobs**: No
- Exempt from Federal Income Tax**: No
- Qualifying Dependents Amount**: 0 USD
- Other Dependents Amount**: 0 USD
- Total Dependents Amount**: 0 USD
- Other Income Amount**: 0 USD
- Deductions Amount**: 0 USD

At the bottom, there is a declaration: **\*Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.** with a checked **I agree** checkbox.

STEP 16

Click the "I agree" checkbox, to declare that this information is true, correct, and complete.

This screenshot is identical to the one in Step 15, but the **I agree** checkbox at the bottom is now checked, indicating that the user has agreed to the terms of the declaration.

STEP 17

Click on “Save and Close” to record this information in the system.

**Federal Taxes** [Delete] [Save and Close] [Cancel]

\*When does this change start?  
6/6/22

**Withholding Status**

\*Filing Status  
Married filing jointly or Qualifying widow(er)

Multiple Jobs  
No

Extra Withholding  
500 USD

You may claim exemption from withholding if both of the following apply.  
1. You had no federal income tax liability in the prior year.  
2. You expect to have no federal income tax liability in the current year.  
If you claim exempt, you will have no income tax withheld from your pay.

Exempt from Federal Income Tax  
No

Qualifying Dependents Amount  
0 USD

Other Dependents Amount  
0 USD

Total Dependents Amount  
0 USD

Other Income Amount  
0 USD

Deductions Amount  
0 USD

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

STEP 18

For additional notes and guidance, Click on ‘Federal’ link. Please make use of the IRS Estimator for the most accurate withholding.

Weber County TEST/UAT Environment (Last Refresh: 19/MAY/2022)

Webber County

Tax Withholding

GM

Weber County

Federal

Calculation Component  
Federal Taxes

Start and End Dates  
6/6/22

Forms  
Federal

Filing Status  
Married filing jointly or Qualifying widow(er)

Multiple Jobs  
No

Extra Withholding  
500 USD

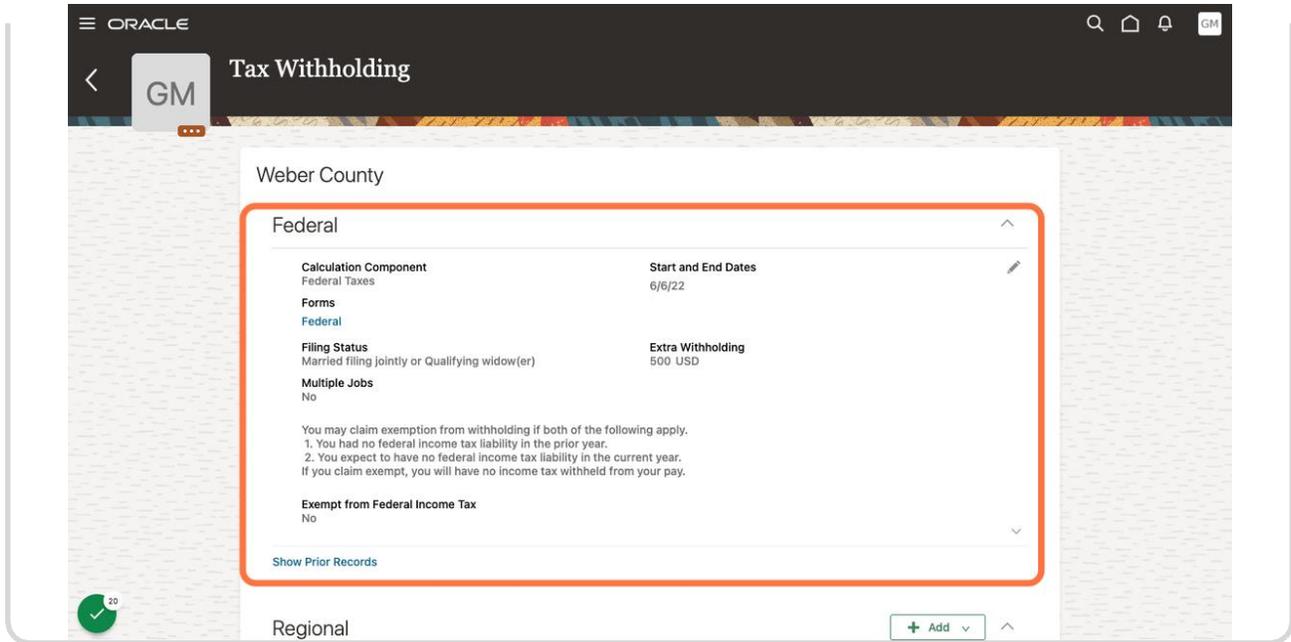
You may claim exemption from withholding if both of the following apply.  
1. You had no federal income tax liability in the prior year.  
2. You expect to have no federal income tax liability in the current year.  
If you claim exempt, you will have no income tax withheld from your pay.

Exempt from Federal Income Tax  
No

Show Prior Records

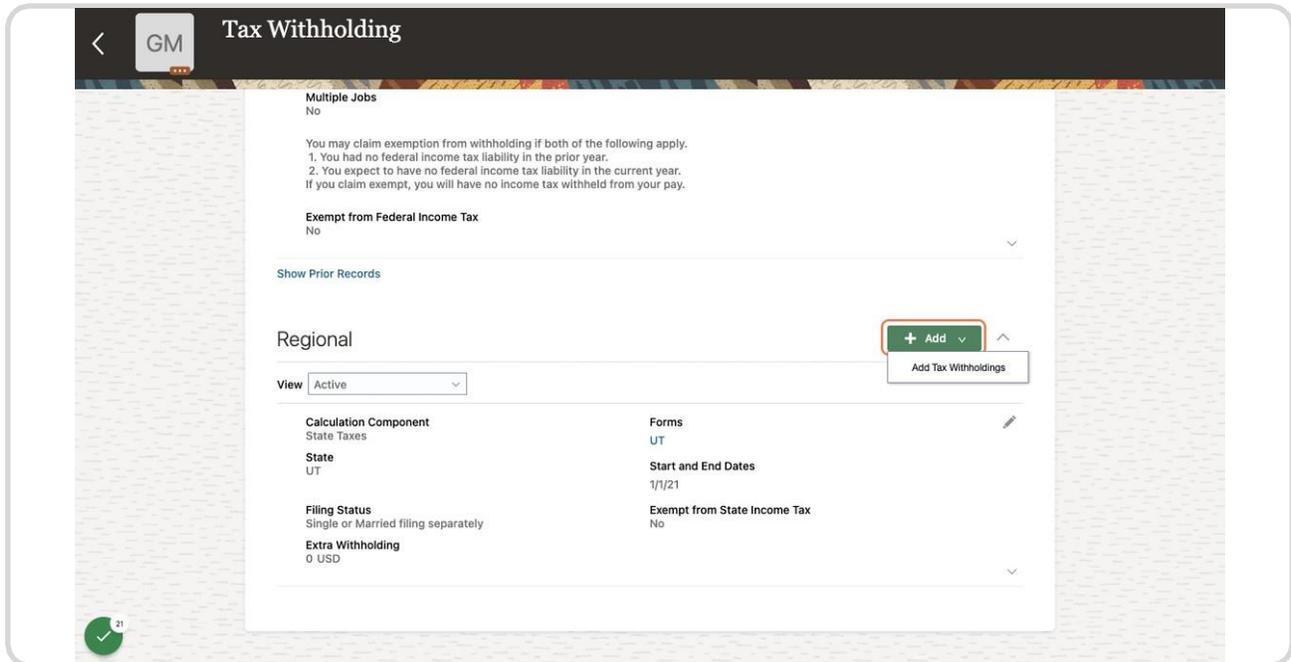
STEP 19

Here you can see the information you just entered for the federal income tax withholding.



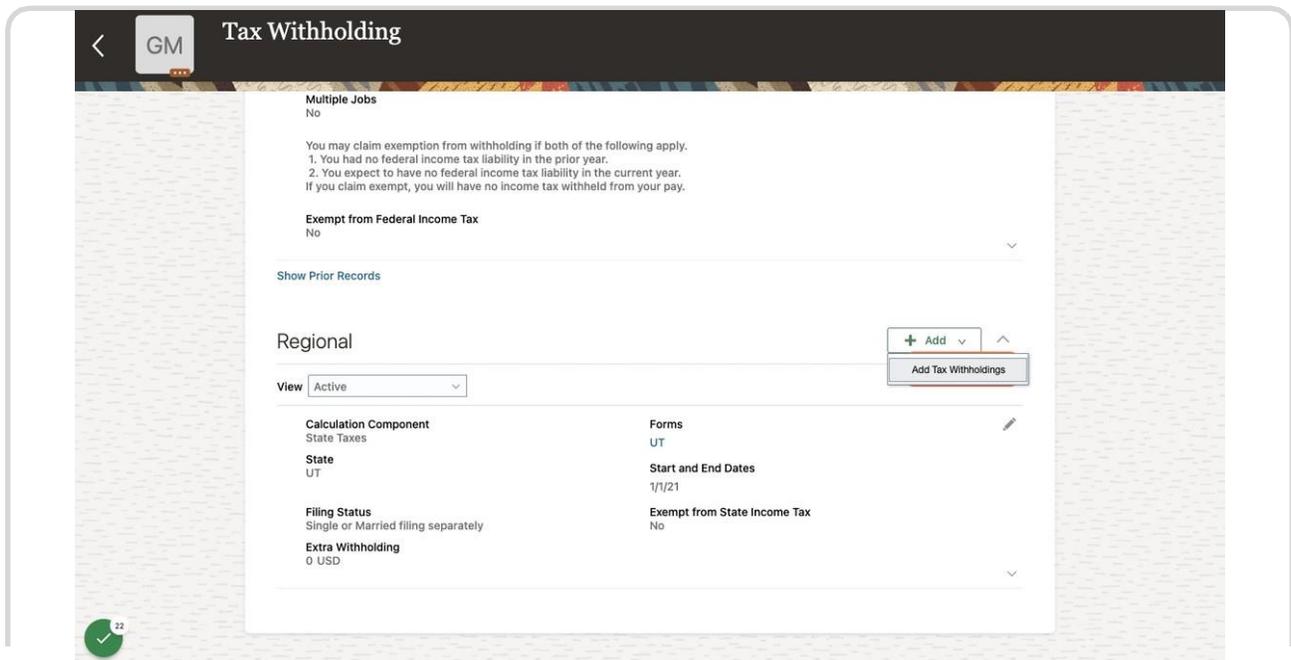
STEP 20

To add your state withholdings, click “+ Add” drop down under Regional section.



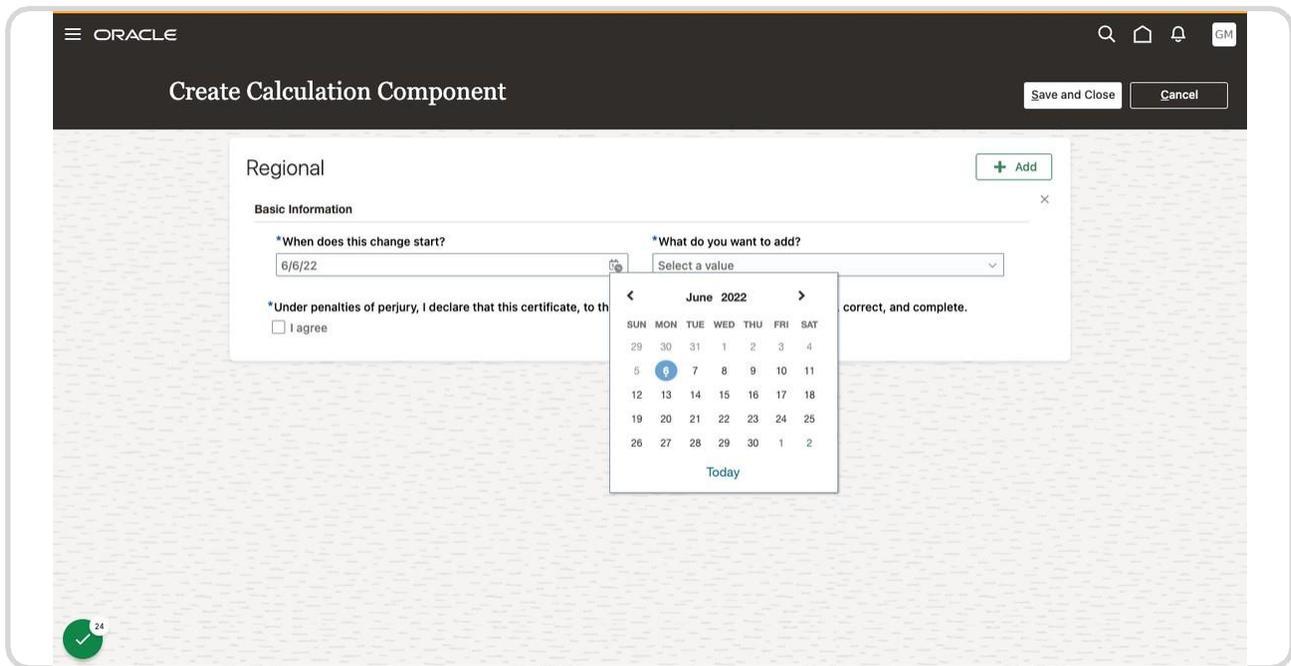
STEP 21

Select and click on “Add Tax Withholdings” option.



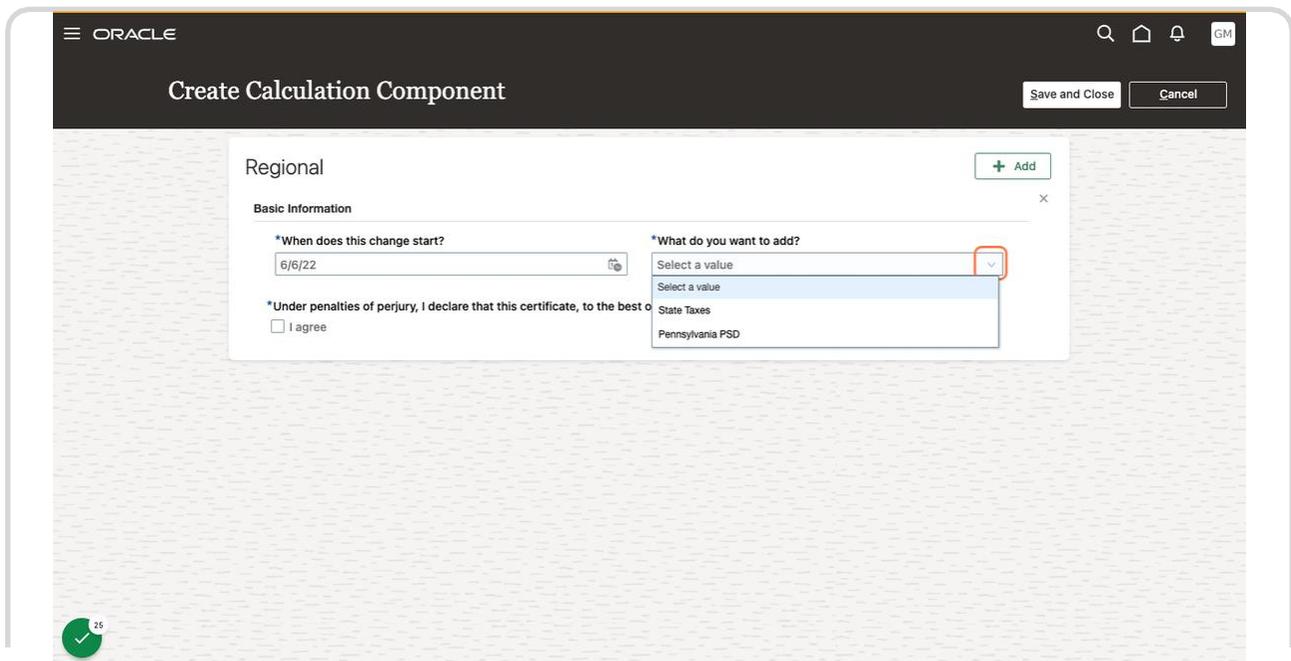
STEP 22

Select the date this tax withholding should start.



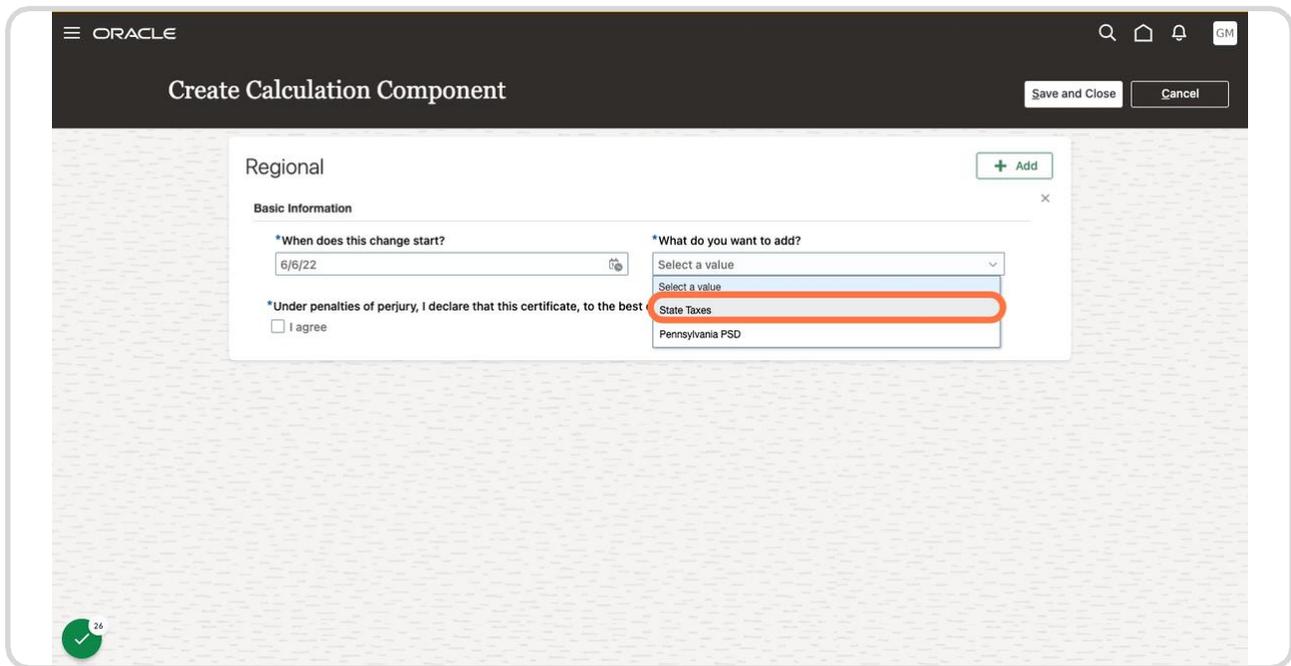
STEP 23

Click on 'What do you want to add' dropdown arrow.



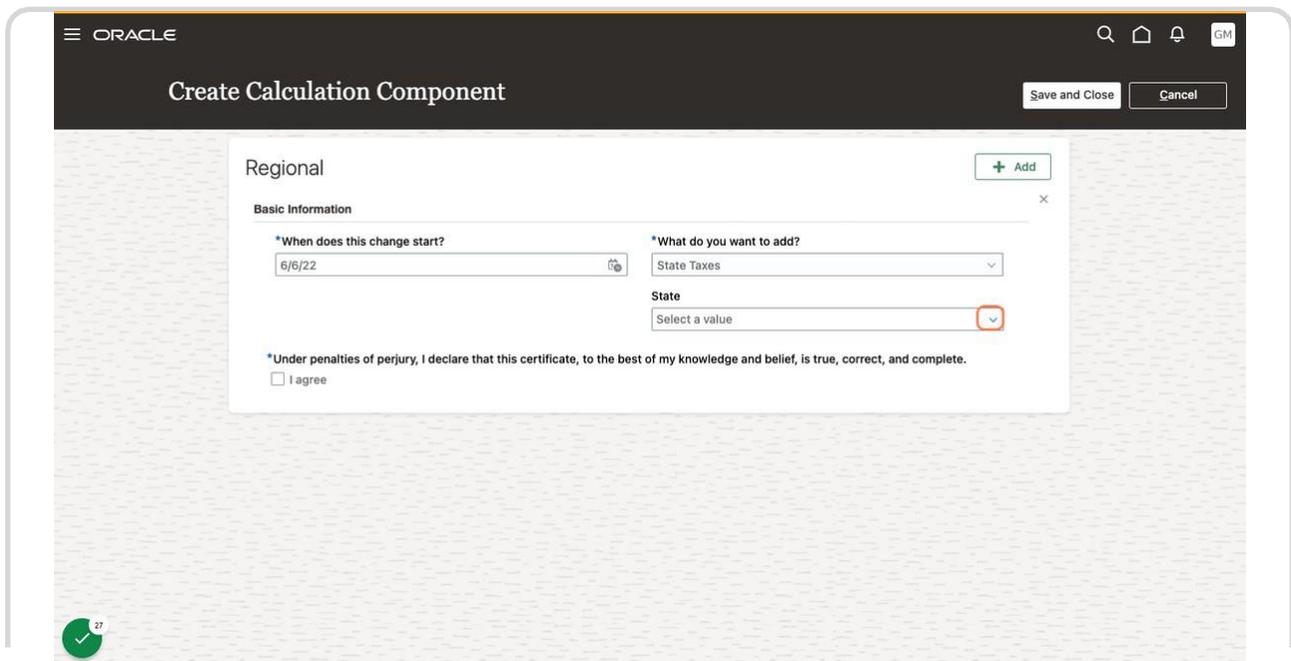
STEP 24

Select "State Taxes"



STEP 25

Click on "State" dropdown arrow.



STEP 26

Select a state. For instance, state NM is selected

ORACLE

Create Calculation Component

Save and Close Cancel

Regional + Add

Basic Information

\*When does this change start? 6/7/22

\*What do you want to add? State Taxes

State NM

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

I agree

STEP 27

Select the "Filing Status" from the dropdown that is appropriate for you. In this example, option "Married filing jointly or Qualifying widower" is selected.

ORACLE

Create Calculation Component

Save and Close Cancel

Regional + Add

Basic Information

\*When does this change start? 6/7/22

\*What do you want to add? State Taxes

State NM

State Tax Information

Filing Status

Select a value

Head of household

Married filing jointly or Qualifying widower

Extra Withholding 0 USD

Exempt from State Income Tax

Select a value

\*Single or Married filing separately

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

I agree

STEP 28

Select “No” for Exempt from State Income Tax unless you qualify for exempt status.

The screenshot shows the 'Create Calculation Component' interface. A modal window titled 'Regional' is open, containing the following fields:

- Basic Information:**
  - \*When does this change start?: 6/7/22
  - \*What do you want to add?: State Taxes
  - State: NM
- State Tax Information:**
  - Filing Status: Married filing jointly or Qualifying widow(er)
  - Extra Withholding: 0 USD
  - Deductions Amount: 0 USD
  - Exempt from State Income Tax: No (highlighted with an orange circle)
- Declaration:** \*Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.  I agree

STEP 29

Click the checkbox “I Agree”, to declare that this information is true, correct, and complete.

This screenshot is identical to the one for Step 28, but the 'I agree' checkbox under the declaration section is now checked.

STEP 30

Click on "Save and Close"

**Create Calculation Component** [Save and Close] [Cancel]

**Regional** [Add]

**Basic Information**

\*When does this change start? 6/7/22

\*What do you want to add? State Taxes

State NM

**State Tax Information**

Filing Status Married filing jointly or Qualifying widow(er)

Extra Withholding 0 USD

Deductions Amount 0 USD

Exempt from State Income Tax No

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

I agree

STEP 31

Here is the regional income tax withholding information you have entered.

**Federal**

Filing Status Married filing jointly or Qualifying widow(er)

Extra Withholding 500 USD

Multiple Jobs No

You may claim exemption from withholding if both of the following apply.

1. You had no federal income tax liability in the prior year.
2. You expect to have no federal income tax liability in the current year.

If you claim exempt, you will have no income tax withheld from your pay.

Exempt from Federal Income Tax No

Show Prior Records

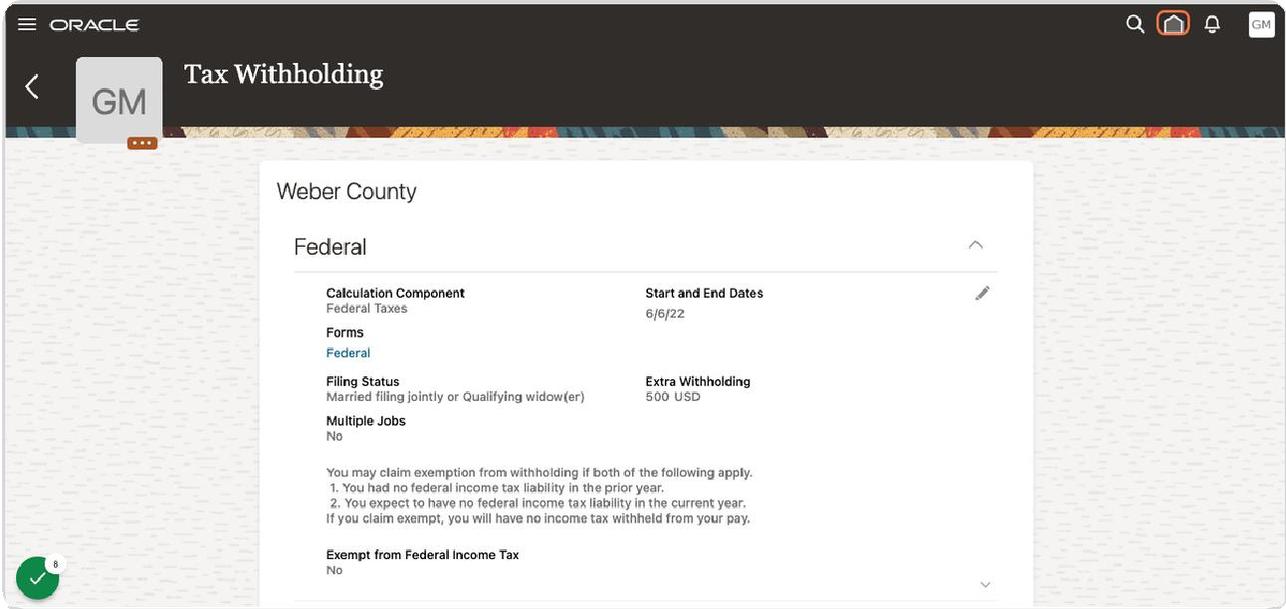
**Regional** [Add]

View Active

Calculation Component	Forms
State Taxes	NM
State	
NM	Start and End Dates
	6/7/22
Filing Status	Extra Withholding
Married filing jointly or Qualifying widow(er)	0 USD
Deductions Amount	Exempt from State Income Tax
0 USD	No

STEP 32

Click on Home icon to return to the main screen



STEP 33

