

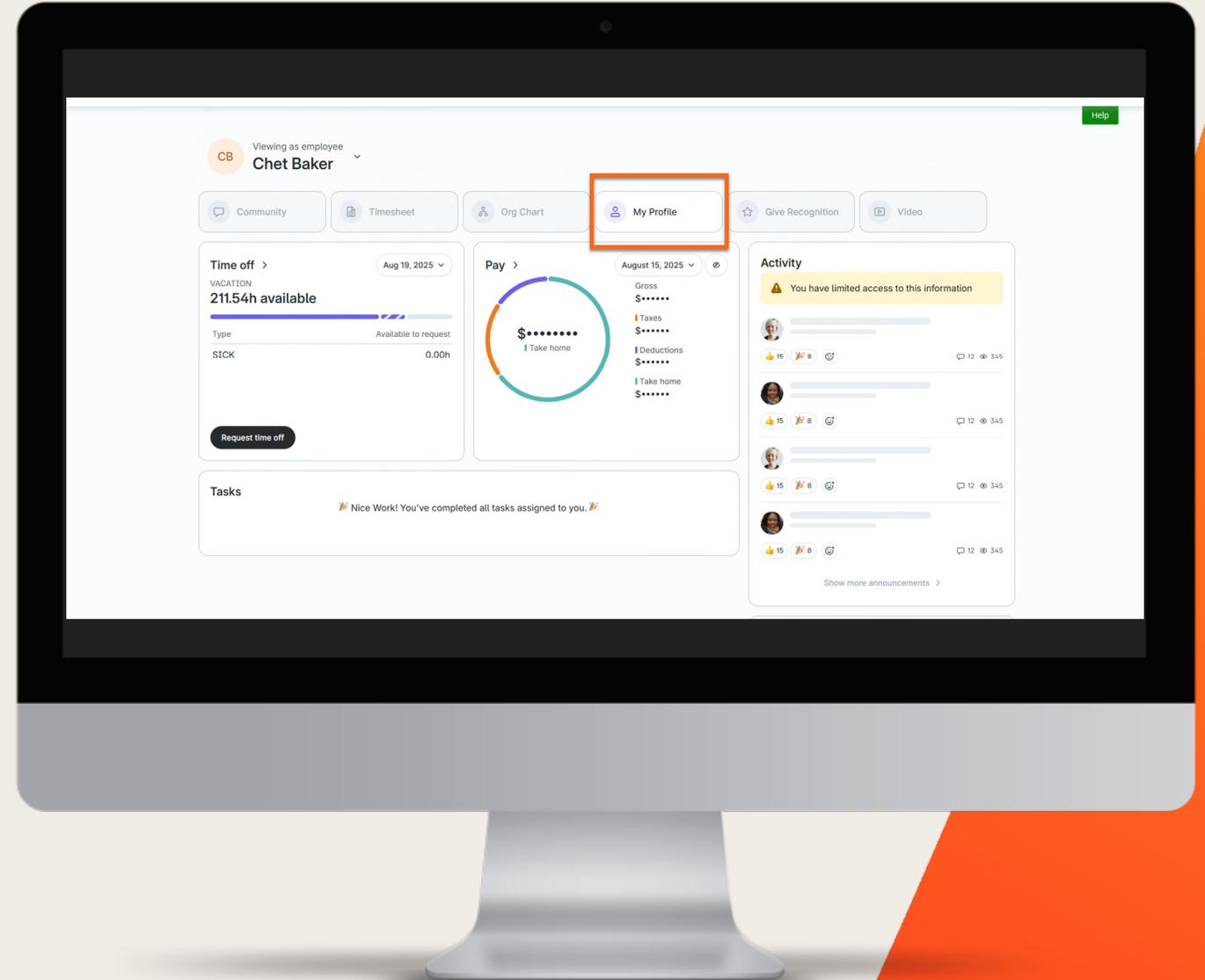


How To Review/Edit Your Tax Information

How To Review/Edit Personal Information

Desktop

- Start from HOME
- Click on 'My Profile' button in the Quick Actions tile



How To Review/Edit Your Tax Information

- Your HR Record will Open
- Click on 'Pay' tab
- Click on 'Tax Setup' link
- Please review your:
 - Federal Income Tax Withholding (FITW)
 - State Income Tax Withholding (SITW)
- To edit, click the blue Pencil icon on the far-right side of the screen

The screenshot displays the Paylocity HR & Payroll interface for Sarah Garcia. The 'Pay' tab is selected, and the 'Tax Setup' section is visible. The 'Tax Setup' section includes fields for Tax Codes (2), Tax Form (W2), SUI State (IL), Retirement Plan, and Statutory. Below these are tables for Federal Income Tax (FITW) and State and Local Taxes. The FITW table has one row with a blue pencil icon in the Actions column. The State and Local Taxes table has one row for IL - Illinois SITW. A red circle with the number 3 highlights the blue pencil icon in the FITW table's Actions column.

Tax Code	Filing Status	Exemption 1	Exemption 2	Type	Amount	Percent	Pre-Filled Form	Actions
FITW - Federal Income Tax	Single	0	N/A	Default	Default	Default	Federal W-4	

Tax Code	Filing Status	Exemption 1	Exemption 2	Type	Amount	Percent	Pre-Filled Form	Actions
IL - Illinois SITW	Single	0	0	Default	Default	Default		

How To Review/Edit Your Tax Information

- Please read the information box about Tax Code on the left-hand side of your screen
- Enter in your [updated] elections in the Mint Green boxes on the far-right side

The screenshot displays the 'Edit Tax' page for Marie Adams, a Customer Support Representative. The page features a 'New Federal W-4 Form' notification, a 'Federal Tax Details' section, and a 'W-4 Tax Form' section. The 'Federal Tax Details' section includes a 'Tax Code' dropdown set to 'Federal Income Tax', a 'Notes' section with a warning about the new W-4 form, and a 'Save' button. The 'W-4 Tax Form' section includes a 'Filing Status' dropdown set to 'Married', a 'Multiple Jobs or Spouse Works' checkbox, and input fields for 'Dependents', 'Other Income', 'Deductions', and 'Extra Withholding', all with 'Mint Green' boxes for values. The 'Amount' field is set to '\$ 0'. A 'Cancel' button is also present.

< Edit Tax

Marie Adams Leave
Customer Support Representative [3]
On leave since 1/9/2023

New Federal W-4 Form
The IRS has released a new version of the Federal W-4 form. If you plan on making any changes to your federal withholding, you will need to update to the new form. Once you make changes, you will not be able to change back to the previous W-4.
[Learn More](#)

Federal Tax Details

Tax Code: Federal Income Tax

Notes: Before completing this page, please be sure to review the instructions contained in the Blank Federal W-4 Form link on the right side of this page. If you meet the following criteria for Exemption from Withholding, use the "Exempt From Withholding" option in the drop down for Line 4c. This status expires on February 15th of the year following the declaration of exemption status. To claim exempt, fill your total tax on your previous year's.

W-4 Tax Form

2019 or Prior 2020 or Later [Blank Federal W-4 Form](#)

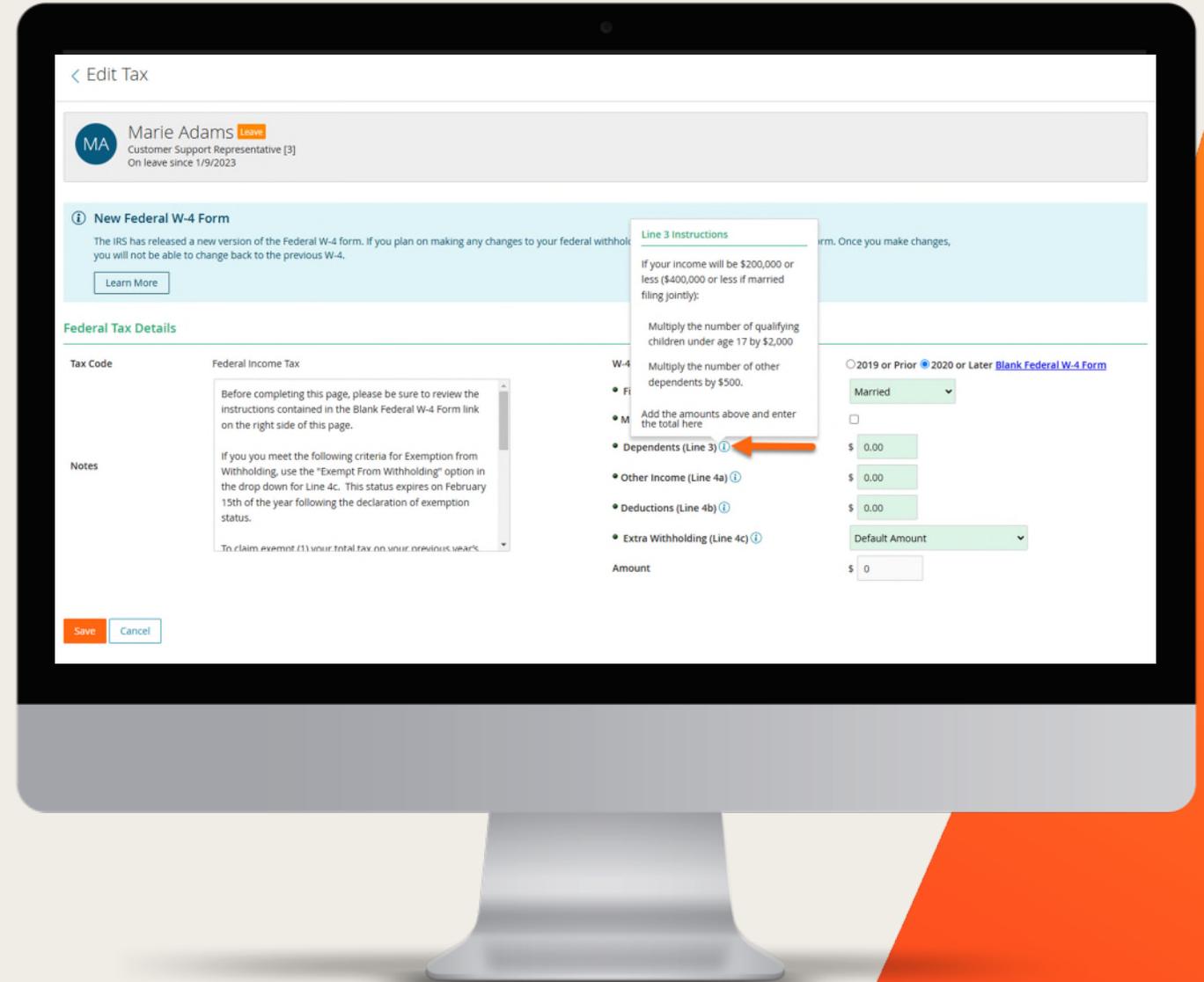
- Filing Status: Married
- Multiple Jobs or Spouse Works (Line 2c):
- Dependents (Line 3): \$ 0.00
- Other Income (Line 4a): \$ 0.00
- Deductions (Line 4b): \$ 0.00
- Extra Withholding (Line 4c): Default Amount

Amount: \$ 0

[Save](#) [Cancel](#)

How To Review/Edit Your Tax Information

- If you have any questions about what information can be entered into the corresponding value boxes, click on the icon  to get a detailed explanation from the IRS's website
- For any assistance on what information you could enter into the value boxes, please consult a Tax Professional to get their legal and professional guidance
- When complete, click the orange 'Save' button



How To Review/Edit Your Tax Information

- You will be asked to Save and Confirm your changes
- Please read carefully
- Click 'Save & Confirm'

