# Advantage ESS 3.11-On Demand Training
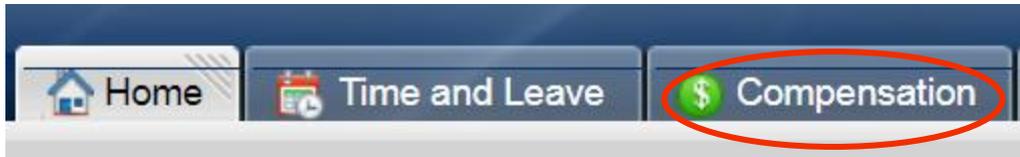
**Class Title:** Create Federal W-4

Creation Date:  05/09/2018
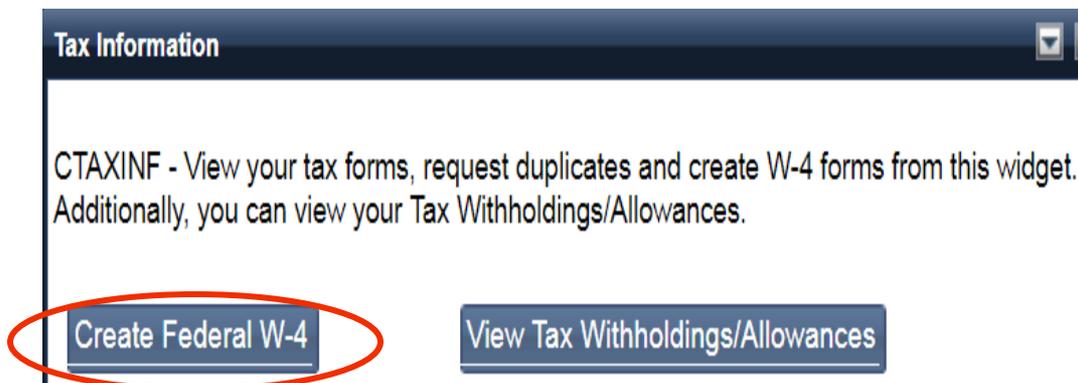Revision Date:  07/09/2018

# Goal & Objectives

**Goal:** After taking this class, staff will know how to change their **FEDERAL** Withholding Tax Liability in ESS 3.11

**Objectives:**
Show staff the steps required to change their own **FEDERAL** Withholding Tax Liability

**ESS 3.11**

Select the **Compensation** tab



Go to the **Tax Information** section and select the **Create Federal W-4** tab

**ESS 3.11**

**Federal W-4**

CFEDW41 - Complete your Federal W-4 form by filling out and verifying the information below. In order to view the Form W-4 worksheet for detailed information, click the following link: http://www.irs.gov/pub/irs-pdf/fw4.pdf

**Employee Information**

| | |
|---|---|
| First Name | Home Address |
| Middle Initial | City/Town |
| Last Name | State |
| Social Security Number | Zip Code |

**Withholding Tax Information**

CFEDW42 - All information in the following section must be filled out accurately and completely.

Last W-4 File Date : 04/24/2018

*Federal Tax Marital Status :

Total number of allowances you are withholding. (If you are claiming EXEMPT, leave this line blank) :

Additional amount, if any, you want withheld from each paycheck. (If you are claiming EXEMPT, leave this line blank) :

I claim exemption from withholding for 2018, and I certify that I meet both of the following conditions for exemption. . Last year I had a right to a refund of all federal income tax withheld because I had no tax liability, and . This year I expect a refund of all federal income tax withheld because I expect to have no tax liability. If you meet both conditions, write "Exempt" here     None ▼

If your last name differs from that shown on your social security card, check here : ☐
You must call 1-800-772-1213 for a new card.

Whether you are entitled to claim a certain number of allowances or exemption from withholding is subject to review by the IRS. Your employer may be required to send a copy of this form to the IRS.

**\*Must select Federal Tax Marital Status**

Complete your Federal W-4 form by filling out and verifying the required information

\*Federal Tax Marital Status :  [          ] 🔼     Select a **Federal Marital Tax Status** from the drop down Menu

**Choose**

Browse Clear

Tax Marital Status : [                    ]          Short Description : [                    ]

This is what you will see when
you open the drop down menu

| | Tax Marital Status | Short Description |
|---|---|---|
| Select | I | INDIVIDUAL |
| Select | M | MARRIED |
| Select | S | SINGLE |
| Cancel | First Previous Next Last | |

**ESS 3.11**

Enter the Total number of allowances you are withholding

Total number of allowances you are withholding. (If you are claiming EXEMPT, leave this line blank) : `0`

**If you are claiming EXEMPT, leave this line blank**

Enter Additional amount, if any, you want withheld from each paycheck

Additional amount, if any, you want withheld from each paycheck. (If you are claiming EXEMPT, leave this line blank) : `50.00`

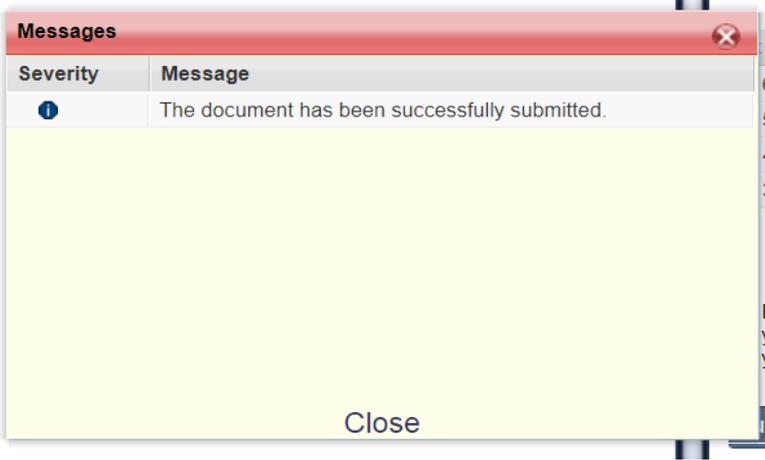**If you are claiming EXEMPT, leave this line blank**

IF you wish to claim EXEMPT, select Exempt from the drop down menu; otherwise, leave at None

I claim exemption from withholding for 2018, and I certify that I meet both of the following conditions for exemption. . Last year I had a right to a refund of all federal income tax withheld because I had no tax liability, and . This year I expect a refund of all federal income tax withheld because I expect to have no tax liability. If you meet both conditions, write "Exempt" here

None ▾

Exempt ▾

**Under IRS regulations, a Form W-4 is invalid if the employee writes "Exempt" on line 7 and also enters a number on line 5 or an amount on line 6**

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☑ Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete. (Form is not valid unless you electronically sign it by selecting this checkbox and selecting the Submit button)

Submit

| Messages | ✕ |
|---|---|
| **Severity** | **Message** |
| ℹ | The document has been successfully submitted. |

Close

You will see a verification message when the document has been successfully submitted

**Tax Information**

CTAXINF - View your tax forms, request duplicates and create W-4 forms fr
Additionally, you can view your Tax Withholdings/Allowances.

Create Federal W-4          View Tax Withholdings/Allowances

You can verify the change has been made by selecting the **View Tax Withholdings/Allowances** tab in the **Tax Information** section

**Federal Tax Information**

    **Federal Tax Marital Status :** MARRIED        **Federal Tax Allowance :** 0

**Additional Federal Withholdings**

| Type | Plan | Amount | Percent | From | To |
|------|------|--------|---------|------|-----|
| FEDTX ADDLBL | FED TAX-ADDL | 50.00 | | 04/01/2016 | 09/01/2016 |
| FEDTX ADDLBL | FED TAX-ADDL | 50.00 | | 09/02/2016 | 09/02/2016 |
| FEDTX ADDLBL | FED TAX-ADDL | 10.00 | | 05/08/2018 | 12/31/9999 |

The active tax withholding will be at the bottom

**ESS 3.11**

# Thank You!

## This concludes the User Training for How to Change **FEDERAL** Withholding in ESS 3.11

**ESS 3.11**