

# How to: Change your tax information (withholdings)



This Guide will provide step by step instructions on how to change your federal and state withholdings.

**\*\*NOTE: It is highly recommended that you consult a tax professional and download the form(s) for reference before making any changes to your federal and state withholdings. \*\***

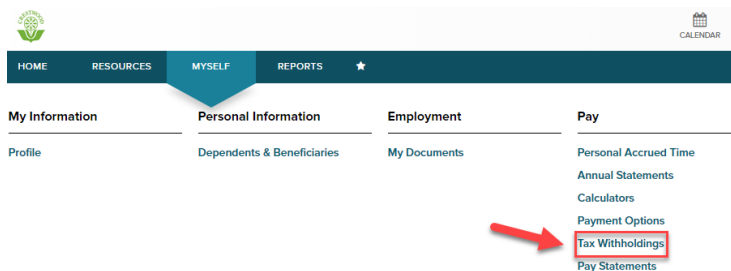
Step 1: Navigate to ADP: <https://workforcenow.adp.com/workforcenow/login.html>

Step 2: Enter your credentials (set up during open enrollment)

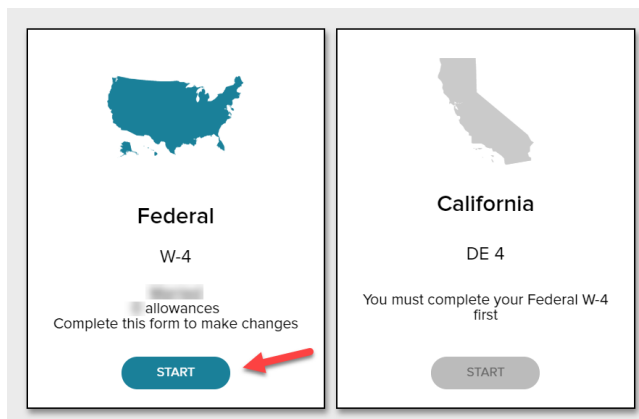
Step 3: Click under Myself



Step 4: Click on Tax Withholdings which is under the Pay category



Step 5: Under Federal click Start



Step 6: Read the information and Download the w4 form (if necessary) then click Next

#### Before You Begin



Your employer uses Form W-4 to withhold the proper amount of federal income tax from your paycheck. The IRS recommends that you submit a new W-4 each year, or any time your personal or financial situation changes.

You can fill out your W-4 using this convenient tool. However, some questions may require the use of supplemental worksheets and instructions. Therefore, it may be useful for you to [download a blank copy of the W-4](#) for reference.

If you need assistance completing your Form W-4, consult your tax professional.



Step 7: *Carefully review* the personal information and click **Next**

Is this information correct?

Your first name, middle, and last name

XXXXXXXXXX

Your home address

XXXXXXXXXX


Madera, CA XXXXX

US

Your Social Security number

Reveal

XXX-XX-XXXX

 If you click Reveal, use caution to prevent your sensitive information from being viewed by others.

If your last name differs from the one on your Social Security card, check this box. Then call 1-800-772-1213 for information on how to get a replacement card.



Step 8: Answer the non-resident alien question and then click **Next**

Are you a non-resident alien?

You are considered a non-resident alien if you are not a US citizen and do not meet either the **green card test** or the **substantial presence test** for the calendar year (January 1 - December 31).

- I'm a non-resident alien.
- I'm a US citizen or a resident alien.



Step 9: Answer the marital status question and click **Next**

What is your filing/marital status?

- Single (also applies if married but legally separated, or spouse is a non-resident alien)
- Married
- Married, but withhold at higher Single rate



Step 10: Refer to Section 7 of the form (if you downloaded it) and answer the tax exempt withholding question and click **Next**

Are you tax exempt?

Refer to Section 7 of [Form W-4](#), Employee's Withholding Allowance Certificate for more instructions.

I claim exemption from withholding for the current year, 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.

I do not claim exemption from withholding

Step 11: Enter the total # of allowance you're claiming (referring to your form) and any additional amount you want held from each paycheck (if applicable) then click **Next**

How many allowances are you claiming?

Refer to [Form W-4](#), Employee's Withholding Allowance Certificate for worksheets and instructions.

Total number of allowances you are claiming (from line H or the applicable worksheet)

Do you want to withhold additional taxes?

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

Step 12: *Thoroughly* review the document for accuracy then check the box to confirm everything is correct. If it's not correct you the previous button to go back and fix it. Print the completed form now for your records, then click Done

Under the penalties of perjury, I certify that the number of withholding allowances claimed on this certificate does not exceed the number to which I am entitled or, if claiming exemption from withholding, that I am entitled to claim the exempt status.

I agree under penalty of perjury to the declaration above and understand that this form is not valid until I have provided my electronic signature by acknowledging and clicking Done.

**Date: Nov 22 2019**

Lastly you'll get a notification letting you know if you want to update State withholding to do that individually.

**Important!**

Your federal tax withholding will be used for federal tax calculation purposes only. If you would like to change your state tax withholding or would like the state withholding to be the same as federal, you must submit the state withholding form(s).

OK

Next, if you'd like to update your state withholding you're taken right to that screen (if you don't want to, you can logout at this point)

Step 1: Click **Start** under California



The screenshot shows two side-by-side panels. The left panel is titled 'Federal' and features a map of the United States. Below the map, it says 'W-4' and 'EDIT'. The right panel is titled 'California' and features a map of California. Below the map, it says 'DE 4' and 'Complete this form to make changes'. A red arrow points to the 'START' button in the California panel.

Step 2: Review the information and download the form for reference and click **Next**

Before You Begin

You can use one Form W-4 for both Federal and State tax withholdings. However, you should complete Form DE 4 to claim your California Personal Income Tax (PIT) withholding if:

- (1) You want to claim a different marital status, number of regular allowances, or additional dollar amount at the state level
- (2) You want to claim additional allowances for estimated deductions at the state level



**Important:** Federal tax brackets and withholding methods do not reflect state PIT withholding tables. Therefore, if you do not complete a Form DE 4 **your state income tax may be significantly underwithheld**, especially if you have multiple sources of household income.

You can complete your Form DE 4 using this convenient tool. However, some questions may require the use of supplemental worksheets and instructions. Therefore, it may be useful for you to [download a blank copy of the DE 4](#) for reference.

If you need assistance completing your Form DE 4, consult your tax professional.

CANCEL

NEXT

Step 3: Reviewing the information *for accuracy* and click **Next**

Is this information correct?

Your first name, middle, and last name  
████████████████████

Your home address  
████████████████████  
Madera, CA ██████████  
US

Your Social Security number  Reveal  
XXX-XX-██████

**⚠** If you click Reveal, use caution to prevent your sensitive information from being viewed by others.

If your last name differs from the one on your Social Security card, check this box. Then call 1-800-772-1213 for information on how to get a replacement card.

Step 4: Answer the filing/marital status question then click **Next**

What is your filing/marital status?

SINGLE or MARRIED (with two or more incomes)

Married (one income)

HEAD OF HOUSEHOLD

Step 5: Review the California Tax Exempt policy and make a selection then click **Next**

Are you tax exempt?

I certify under penalty of perjury that I am not subject to California withholding. I meet the conditions set forth under the Service Member Civil Relief Act, as amended by the Military Spouses Residency Relief Act:

- My spouse is a member of the Armed Forces present in California in compliance with military orders;
- I am present in California solely to be with my spouse; and
- I maintain my domicile in another state.

I do not claim exemption from withholding

Step 6: Using the form as a reference select the # of allowances from Worksheet A & B and any additional amount you want withhold (if applicable) then click **Next**

California Tax Withholding [DOWNLOAD BLANK FORM DE 4](#)

How many allowances are you claiming?

Number of allowances for Regular Withholding Allowances, Worksheet A

Number of allowances from the Estimated Deductions, Worksheet B

Total Allowances: 1

Do you want to withhold additional taxes?

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

Step 7: Reviewing the form thoroughly to be sure it is accurate, use the previous button if you need to make any changes. Print the completed form now if you wish to have it for your records. When you're confident the information is correct check the box to confirm and click Done.

Under the penalties of perjury, I certify that the number of withholding allowances claimed on this certificate does not exceed the number to which I am entitled or, if claiming exemption from withholding, that I am entitled to claim the exempt status.

I agree under penalty of perjury to the declaration above and understand that this form is not valid until I have provided my electronic signature by acknowledging and clicking Done.

**Date: Nov 22 2019**

[CANCEL](#) [PREVIOUS](#) [DONE](#)

[PRINT COMPLETED FORM](#)

You're finished, you'll see that the CA form is pending review and approval

This form is pending review & approval



**California**

DE 4

(Once approved you'll get an email from a DoNotReply@cbhi.net email confirming it's been approved)

Please logout of ADP at the top right of the screen

[CALENDAR](#) [LOG OUT](#)