The purpose of this Business Process Procedure is to set up or change your tax withholding information in the Integrated HR-Payroll System.

**Business Process Procedure Overview**

The **Tax Withholding Information** service is located in the *My Personal Data* section of ESS. Employees can use this service to set up or change their **Federal** and **State** tax withholding information.

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❌ **CRITICAL!**	**Employees CANNOT change their Withholding Information until their Agency HR has entered their original information into the system. If the Tax Withholding screen displays as blank, the employee must contact their Agency HR.**

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❌ **CRITICAL!**	**Employees CANNOT use ESS to file as EXEMPT for Federal or State Taxes. If an employee wishes to add or remove EXEMPT status, they must contact their Agency HR to complete the necessary forms.**

Maintain Tax Withholding Data

1. From the Integrated HR-Payroll System Home Page, click into the My Data (ESS) tab.
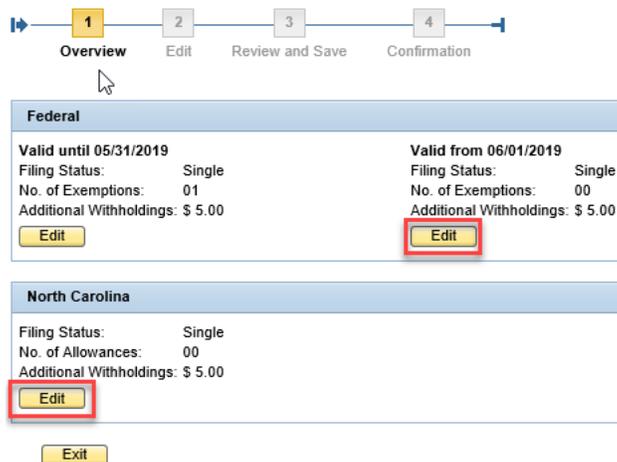
My Data (ESS)
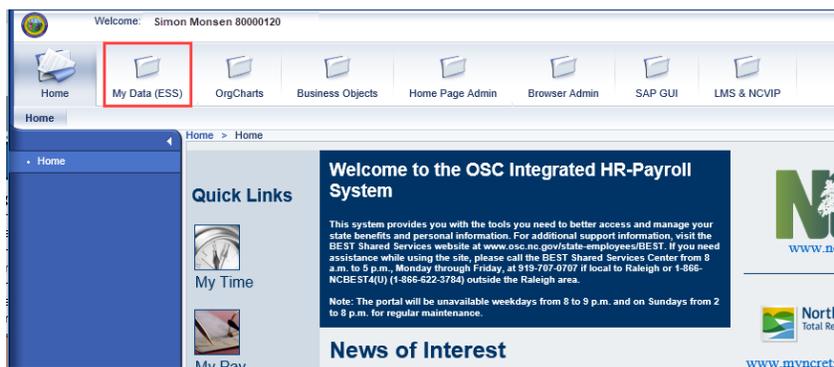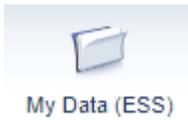
1. Click **My Personal Data**.
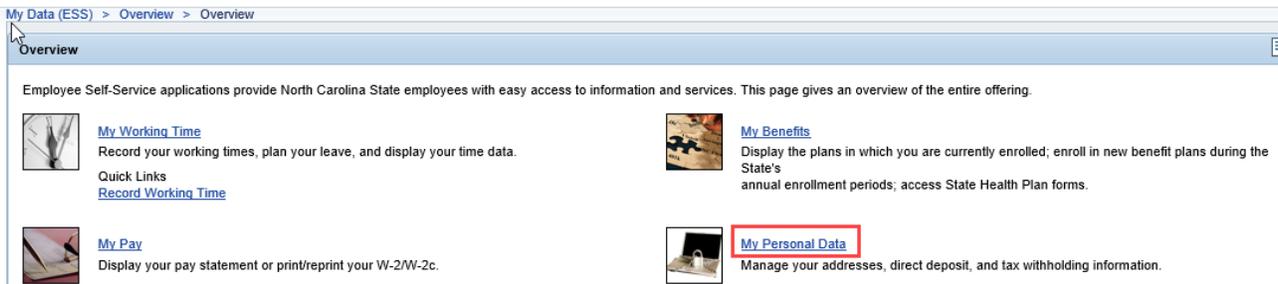
2. The **My Personal Data** screen will be displayed. Click **Tax Withholding Information**.
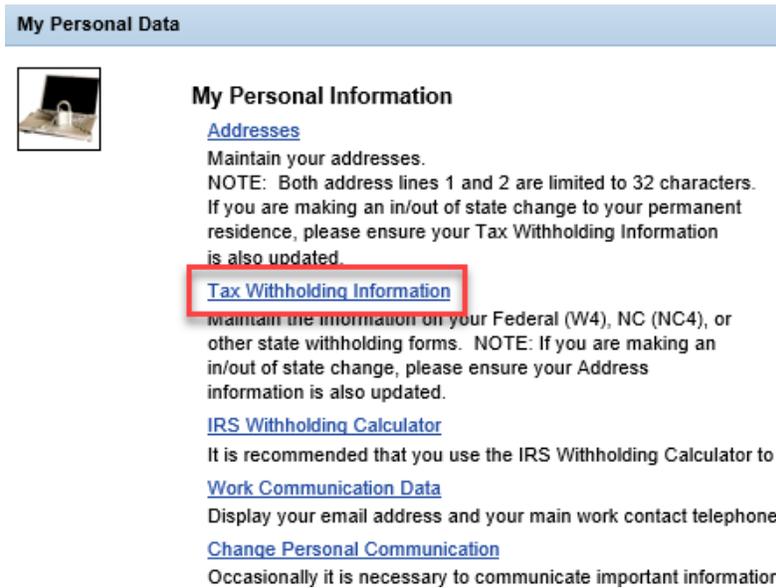
3. The **Tax Withholding** screen will be displayed with the current Federal and State Withholding status. Click the Edit button Edit under either **Federal** or **State.**

4. Update the tax withholding information as needed.

Field Name	Description
Filing Status	Filing status of the individual.
No. of Exemptions	The number of exemptions claimed by the employee
Non-Resident Alien	Employee whose legal residence status is Non-Resident Alien
Additional Withholdings	Items that are being withheld for a payroll action
Social Security/Name Mismatch	Indicate if your SS card is different than your last name.

NOTE: The **Tax Authority** field defaults from your current Permanent address. If you are now filing in a different state, make sure to also update your Address in ESS.

5. Carefully read the Declaration. This serves as your electronic signature approving the change. Once read, check the box to certify.

❌ **CRITICAL!**	Checking this box serves as your electronic signature approving the change. The system will not allow you to save the record until the Declaration checkbox is selected.

6. The **Valid as of Future Date** reflects when the change will take effect. This date can be changed to take effect in a different payroll period.

   NOTE: All withholding changes must be future dated by at least seven days to adhere to payroll processing deadlines. Make sure to change your withholding information as soon as possible so that the change takes effect for the correct payroll period.

7. Once the information has been updated, click the Review button.

8. The updated information will be displayed. If there are any errors, click the Previous Step button to return and correct the mistake. If the information is correct, click the Save button.

5. The message, "The changes you made to your Tax data were saved" will appear.
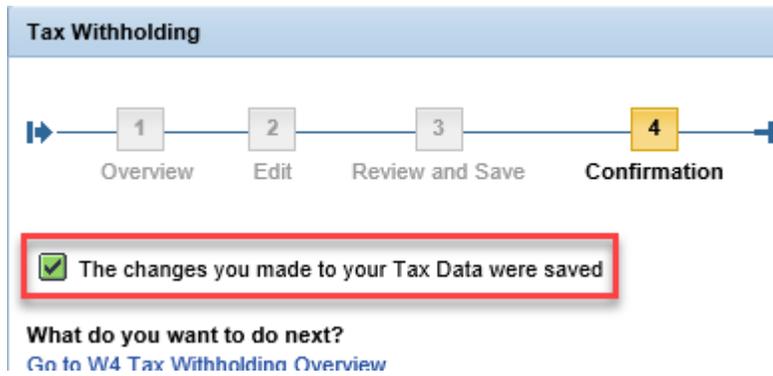
Change Record

- 2/4/21 – Updated format, assigned reference number, and made accessible – Claire Ennis
- 8/6/21 – Updated for accessibility, Alt Text added – D. Genzlinger