# Central Payroll Bureau

# Employee Self Service (ESS)

## Tax Elections for New Employees – Overview

This job aid provides instructions for new employees to complete their initial Federal (W-4), State, and Local Tax Withholding Elections in Workday as part of the onboarding process. Employees will enter their withholding information using the applicable tax forms to establish their payroll tax elections.

## Applicable Roles:

- Employee (ESS)

This job aid provides system navigation only and is not tax advice. Review the IRS W-4 instructions and your state guidance or consult a tax professional if you're unsure. If you cannot access or complete your Tax Elections onboarding tasks in Workday, contact HR/Payroll Support for assistance.

**Job Aid**

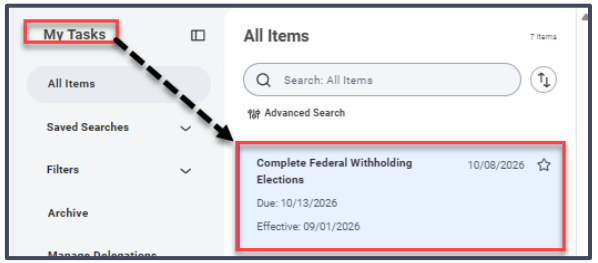


# ESS – Tax Elections for New Employees

**Description:** This job aid guides new employees through completing their initial Federal (W-4) and State Tax Withholding Elections in Workday as part of the onboarding process.

## Steps:

1. From the Workday Homepage, click the **My Task**s icon  in the upper-right corner.




2. In **My Tasks**, locate and select Complete Federal Withholding Elections from the All Items list.

3. In the **Complete Federal Withholding Elections** task, review your employee information, including Company, Effective Date, Name, Social Security Number, and Address.




4. Under W-4 Data, select your applicable **Marital Status** (Filing Status) to begin completing your Federal W-4 withholding elections.



**Tip:** New employees must complete both the Federal and State and Local Withholding Elections tasks in My Tasks during onboarding. Be sure to submit each task separately.

# ESS – Tax Elections for New Employees (Cont'd)

**Description:** This section guides new employees through completing their initial Federal W-4 withholding elections in Workday as part of the onboarding process.

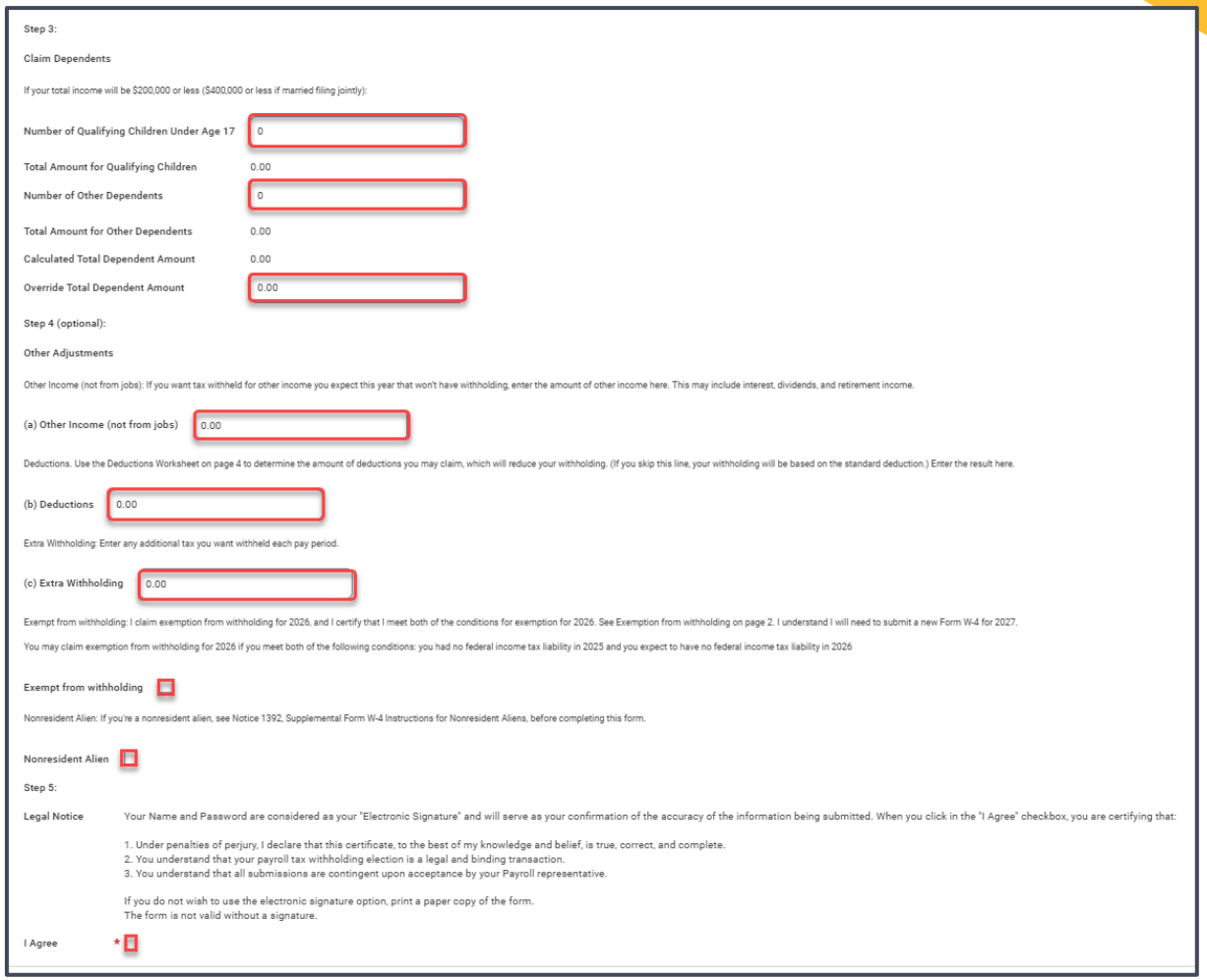
## Steps:

1. Complete the remaining applicable sections of the Federal W-4, including Multiple Jobs or Spouse Works, Claim Dependents, and Other Adjustments.

2. Review the Legal Notice, select **I Agree**, and click **Submit** to complete your Federal Withholding Elections.

3. Return to My Tasks and select Complete State and Local Withholding Elections from the All Items list.

**Tip:** Review all applicable sections of your Federal W-4 carefully before submitting. Verify that your filing status, dependent information, and any additional withholding amounts are accurate.






# ESS - Tax Elections for New Employees – W-4 Reference

**Description:** This section provides helpful guidance for new employees completing their initial Federal W-4 withholding elections in Workday as part of the onboarding process.



**Step 1** (Filing Status): Pick the status that matches today—it drives your baseline withholding.

**Step 2** (Multiple Jobs/Spouse): Complete this section if you have more than one job or are married filing jointly and your spouse also works. Use the IRS Tax Withholding Estimator if you need assistance.

**Step 3** (Dependents): Enter the applicable amounts for qualifying children and other dependents. Workday calculates the total dependent amount.

**Step 4** (Other Adjustments): Enter any applicable Other Income (not from jobs), Deductions, or Extra Withholding per paycheck. Select Exempt only if you meet the IRS eligibility requirements.

**Step 5** (Legal Notice): Review the legal notice, select I Agree, and click Submit to complete your federal withholding elections.

# ESS - Tax Elections for New Employees- State & Local

**Description:** This section guides new employees through completing their initial Maryland MW507 State and Local Tax Withholding Elections in Workday as part of the onboarding process.

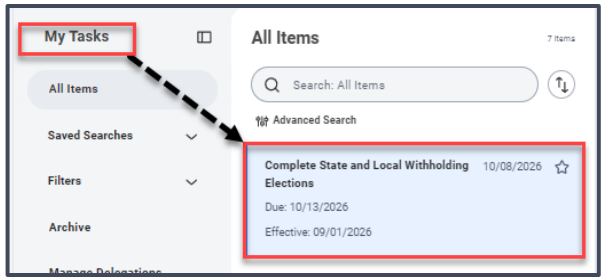
## Steps:

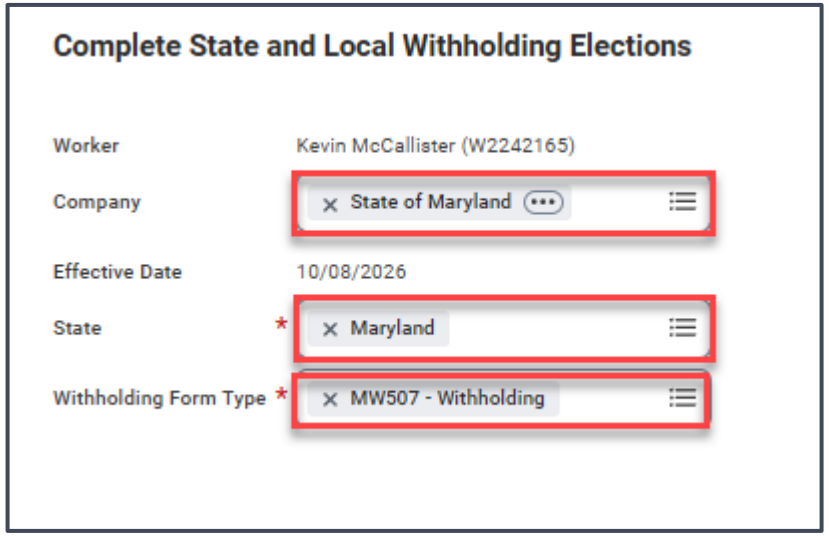
1. From **My Tasks**, locate and select Complete State and Local Withholding Elections from the **All Items** list.
2. In the **Complete State** and **Local Withholding Elections** task, review the **Company**, **Effective Date**, **State**, and **Withholding Form Type** fields.

   **Note:** Complete the fields if they are not auto-populated.
3. Click **OK**.



**Tip:** Federal and State and Local Withholding Elections are separate onboarding tasks. Complete and submit both tasks to establish your initial payroll tax withholding information.



# ESS - Tax Elections for New Employees- State & Local Tax

**Description:** This section guides new employees through completing their initial Maryland MW507 State and Local Tax Withholding Elections in Workday as part of the onboarding process.

**Steps:**

1. Confirm that the applicable withholding form is **MW507 – Withholding** for Maryland.
2. Complete the required Maryland MW507 withholding information:
   - County of Residence
   - Marital Status
   - Number of Exemptions (if applicable)
   - Additional Withholding (if applicable)
3. If eligible to claim exemption from Maryland withholding, select Exempt and complete the Reason for Exemptions and Effective Year fields.
4. If applicable, select Military Spouse Exemption and complete the State of Domicile field.
5. Review and select the **I agree** checkbox.
6. Click **Submit**.

