Adding or Updating Employee Federal Tax Settings

15 Steps [View most recent version](#)

Created by	Creation Date	Last Updated
APS Staff	Apr 17, 2024	May 16, 2024

STEP 1

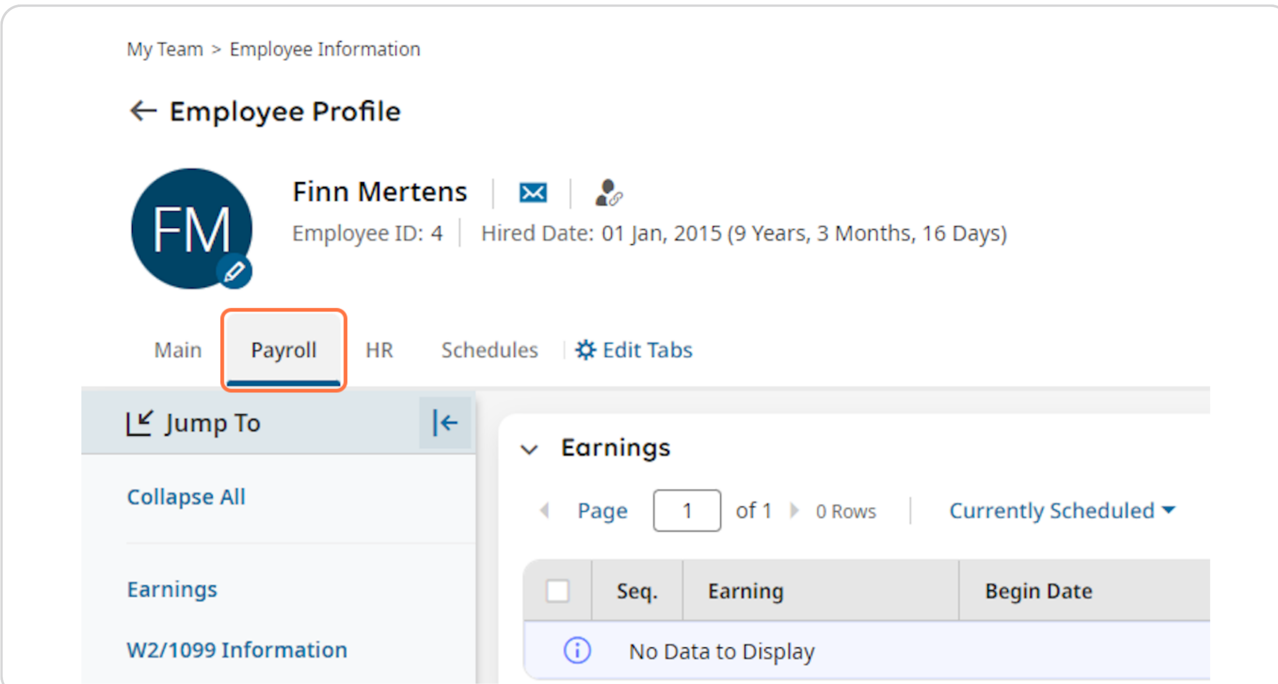
My Team > Employee Information > Employee Profile

You can add and update federal tax settings for individual employees from their personal employee information profile. Begin by navigating to the profile for the employee you need to update.

STEP 2

Payroll Tab

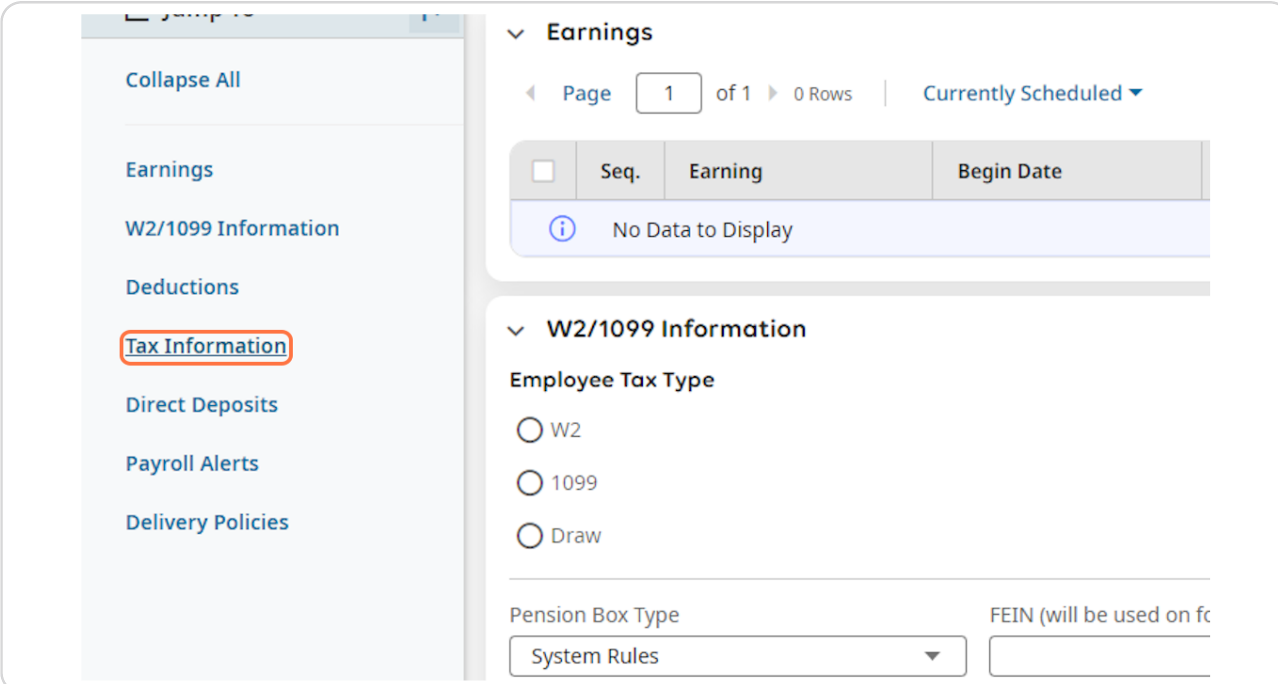
The payroll tab houses all of the pertinent information for processing payroll for an employee. All of the employee's tax settings are located here.



STEP 3

Tax Information

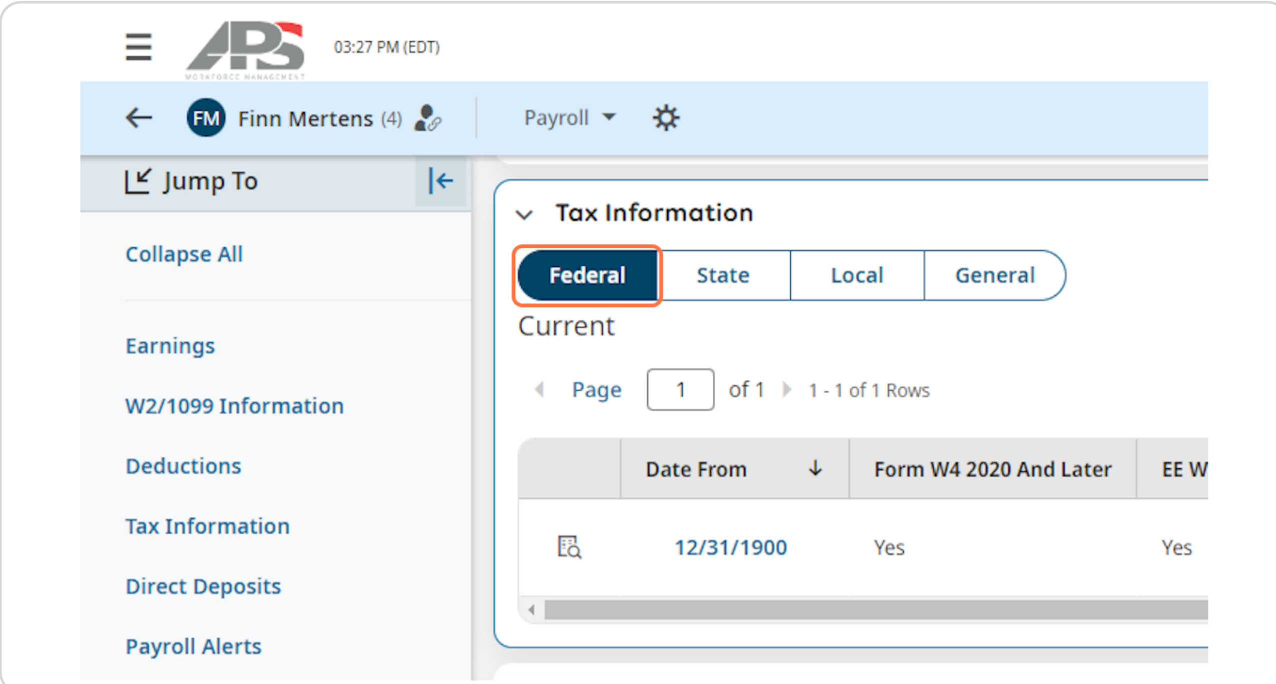
Locate the tax information widget by using either the Jump-To panel, or by scrolling down to the Tax Information widget.



STEP 4

Federal Tax Settings

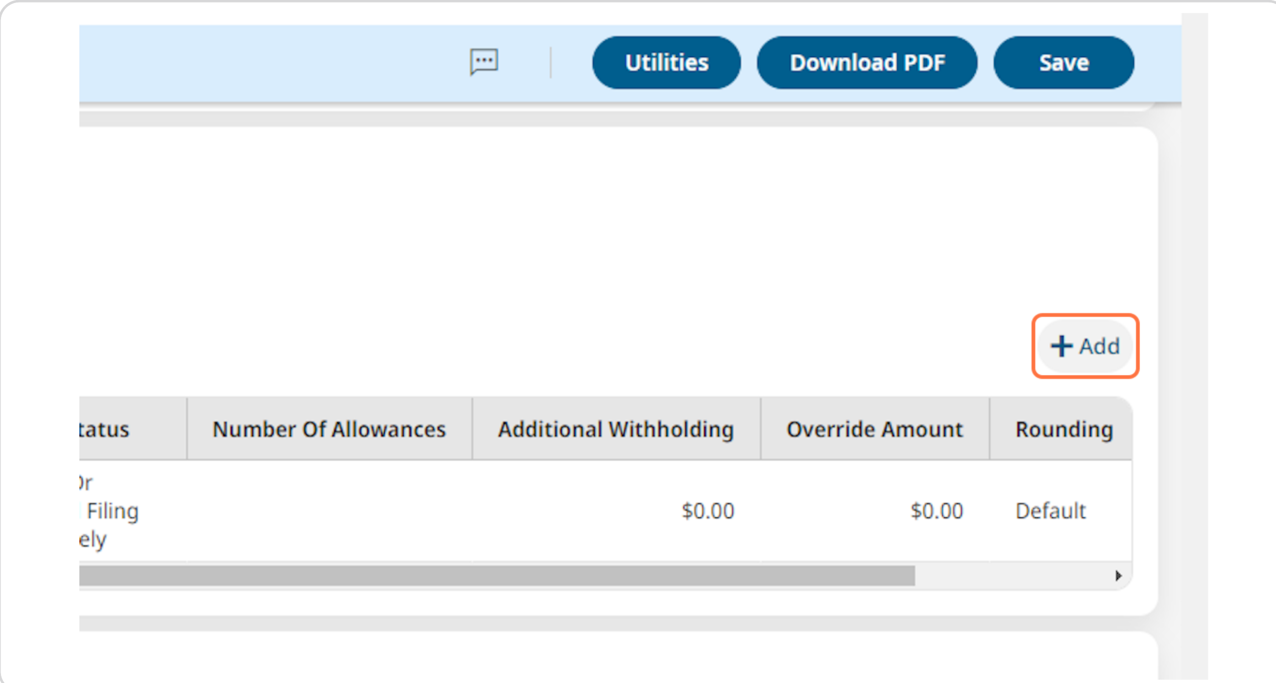
You will notice at the top of the widget that the Federal, State, and Local tax settings are located here. Ensure that the federal tax section is selected to continue.



STEP 5

Begin By Adding New Settings

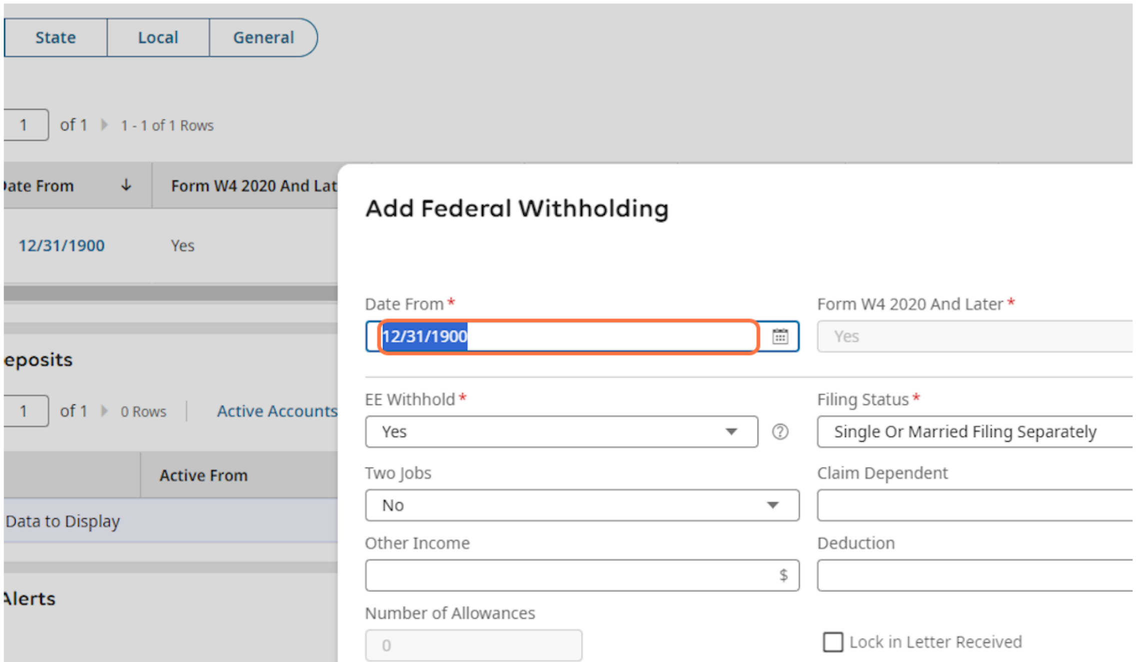
Locate and click on the +Add button located on the right of the widget. This will open a popup to add federal withholding information. All information needed to fill out the federal withholding information will be found on the employee's W-4.



STEP 6

Date From

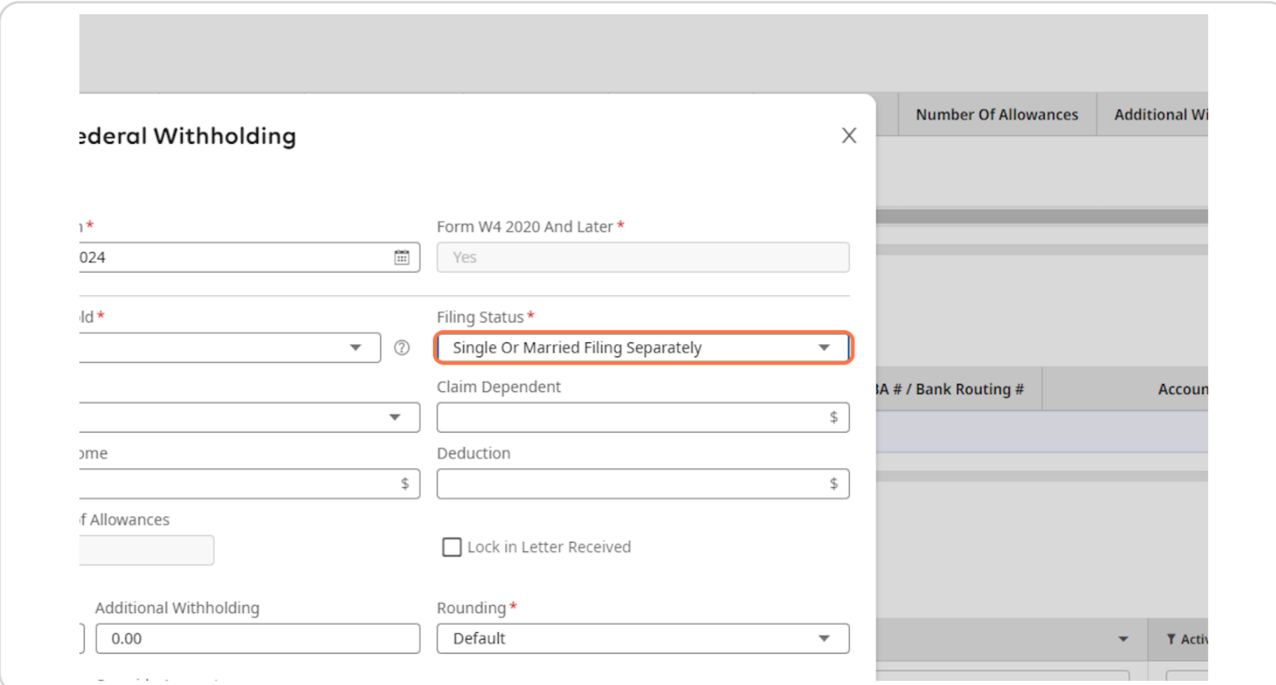
For a new employee, this needs to be set to their hire date. For an existing employee whose settings you are updating, the date should be set based on the date the employee turned in a new W-4.



STEP 7

Filing Status

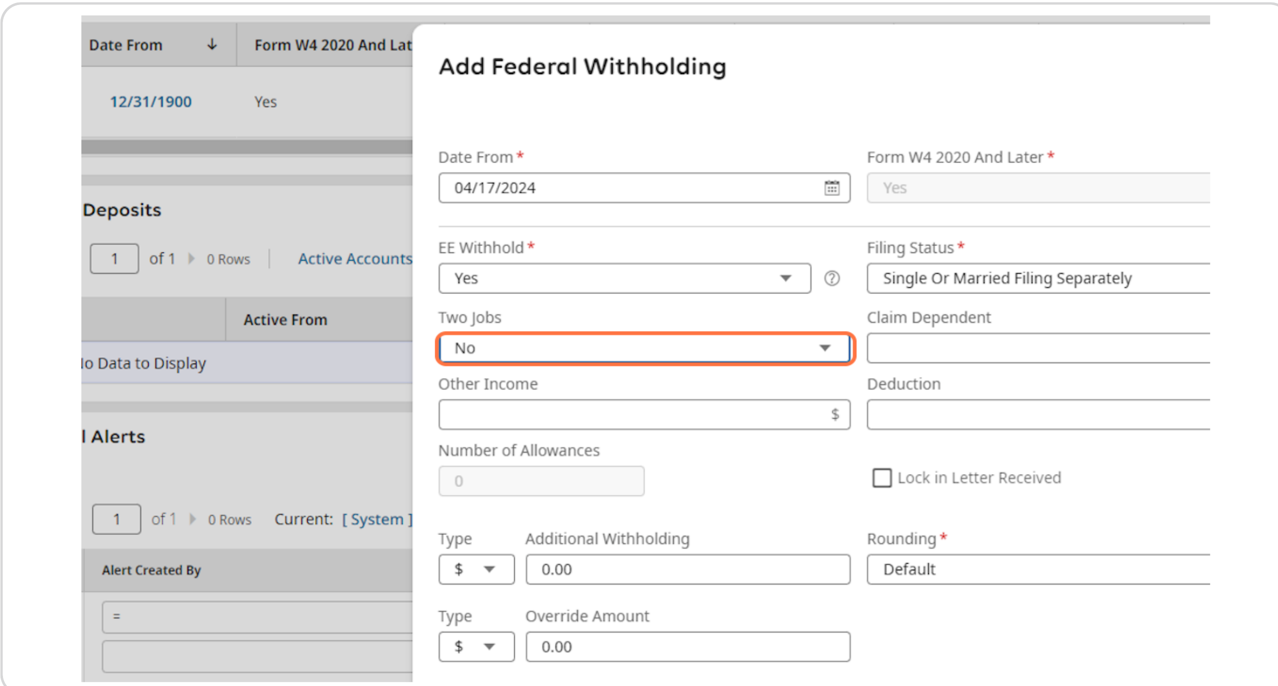
Select the filing status located in **Step 1.(c) of the W-4 form**. If the employee did not select a filing status, or selected more than one filing status, contact the employee to verify the correct setting.



STEP 8

Two Jobs

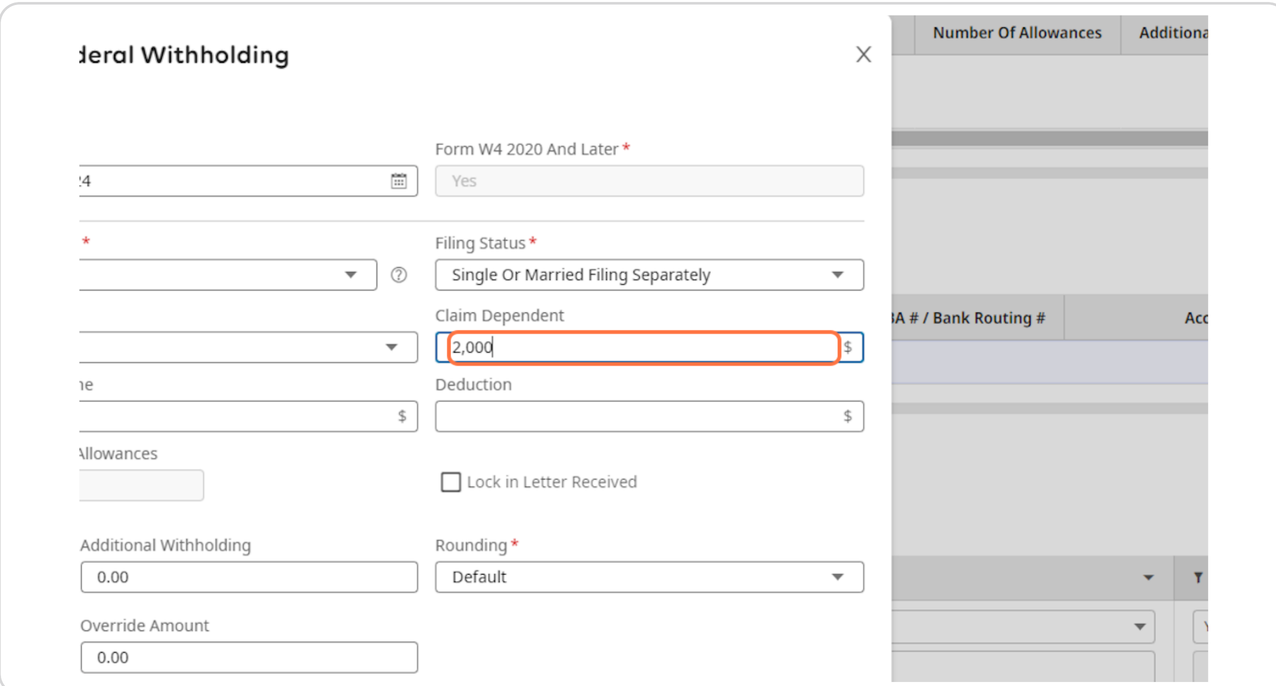
Select yes if the employee marked the box for **Step 2 of the W-4 form**, otherwise select no.



STEP 9

Claim Dependent

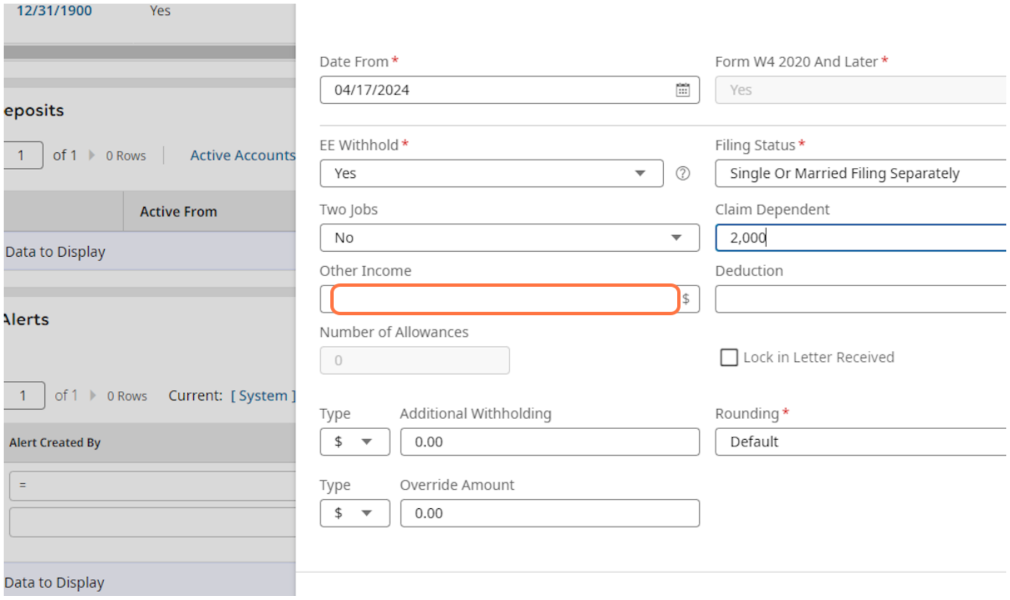
Enter only the total dollar amount for Step 3 of the W-4 form. If the employee filled the total out incorrectly or only listed the total number of dependents and not a dollar amount, you will need to confirm with them the correct amount based on the calculation from the W-4 if they want their taxes to be withheld correctly.



STEP 10

Other Income

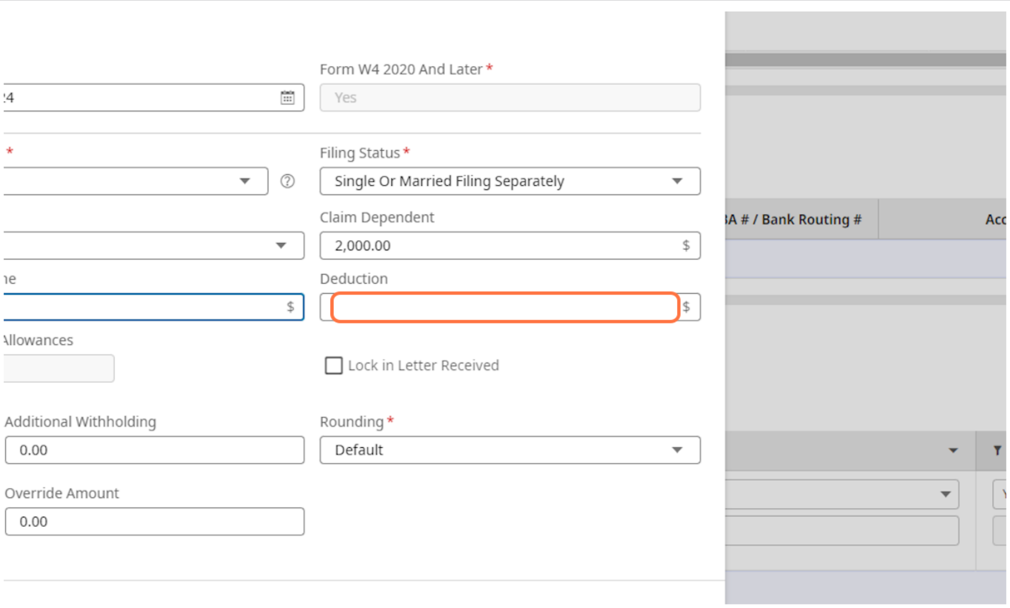
Enter the dollar amount from Step 4(a) of the W-4 form.



STEP 11

Deduction

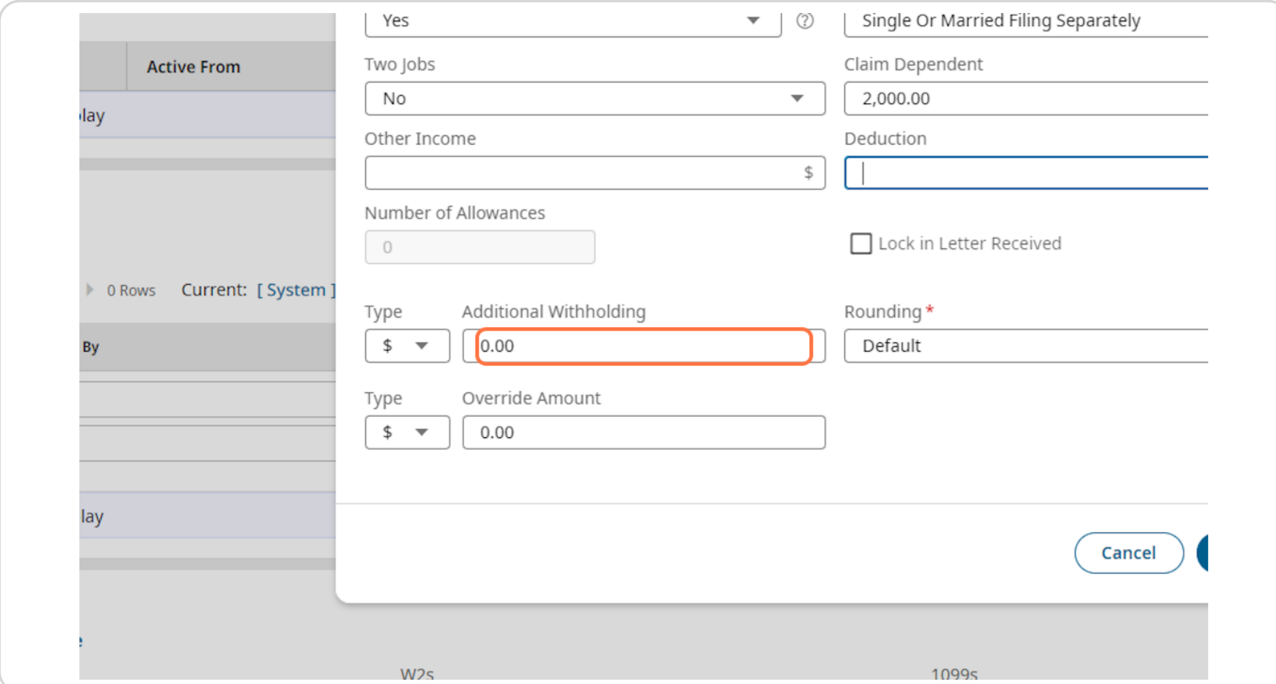
Enter the dollar amount from Step 4(b) of the W-4 form.



STEP 12

Additional Withholding

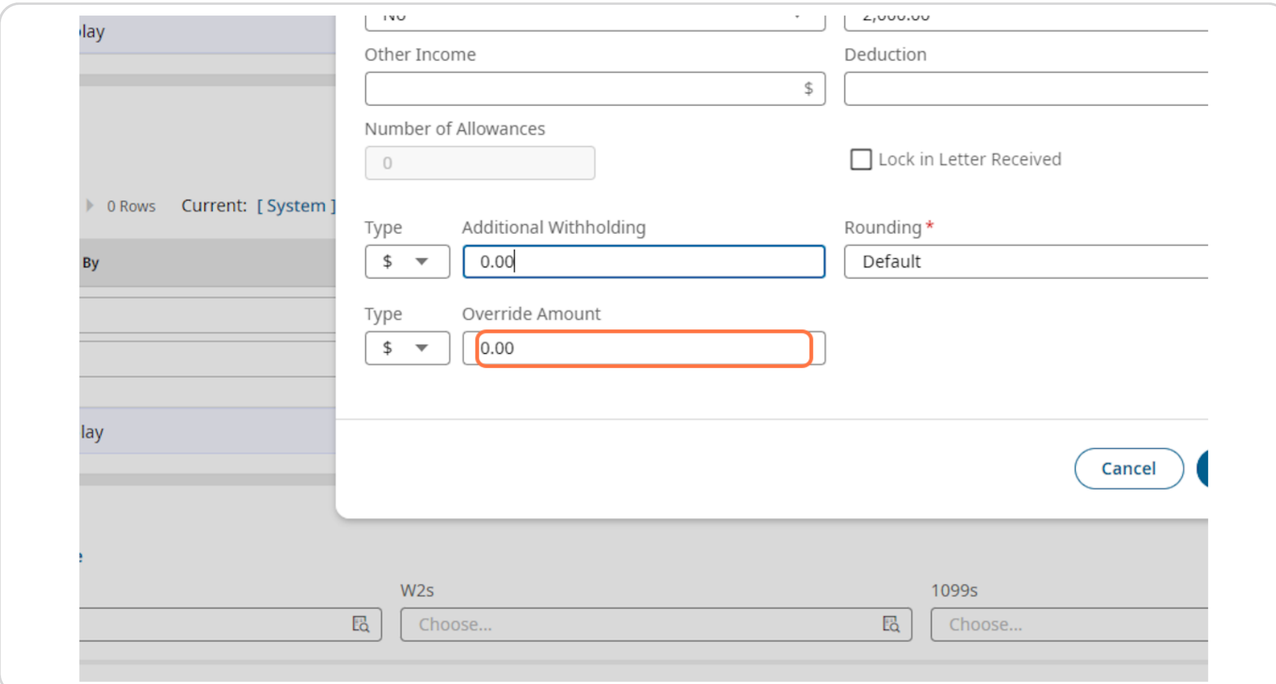
Enter the dollar amount from Step 4(c) of the W-4 form.



STEP 13

Override Amount

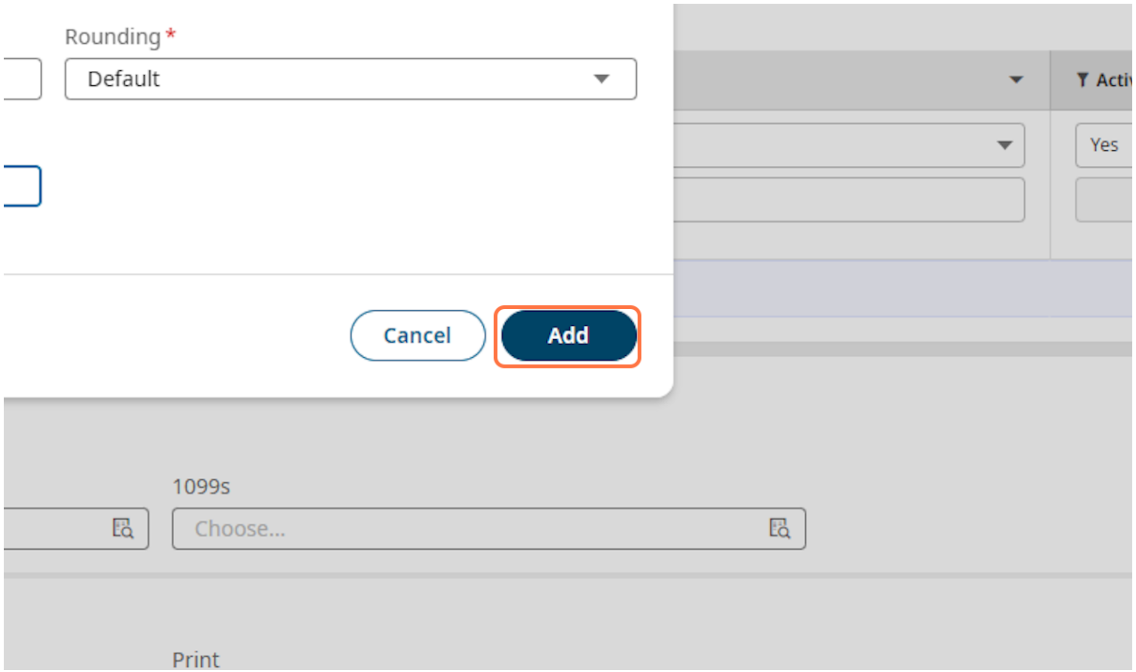
Very rarely, an employee will want to withhold a different amount than what the federal income tax calculation is. You can use the Override Amount field to enter either a dollar or percentage for the employee's personal override to take effect. The "Type" field to the left of the Override Amount is where you select if the override amount is a dollar amount or a percentage of the employee's subject wages.



STEP 14

Double Check and Add

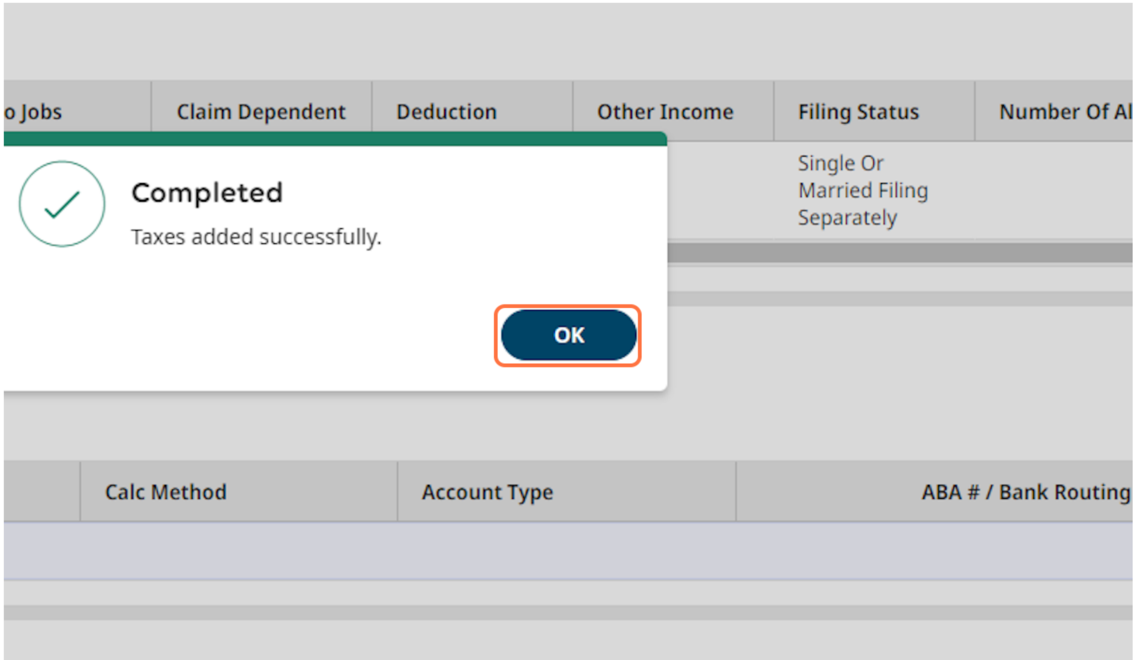
Once you have completed entering the tax settings, click the Add button at the bottom of the popup to add the new tax settings.



STEP 15

Completed

Once the system has accepted the new tax settings, a notification will show that it has been completed.



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