



# Self Service Guide to Federal W-4 Tax Information

# Guide to Federal W-4 Tax Information

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## **Objectives**

The purpose of this module is to teach employees how where to go to set up their own Federal Tax Information in PeopleSoft using Self-Service.

## **Before You Begin**

You must have the following:

- ✓ PeopleSoft URL
- ✓ Self Service User ID and Password
- ✓ Applicable Federal Tax Information

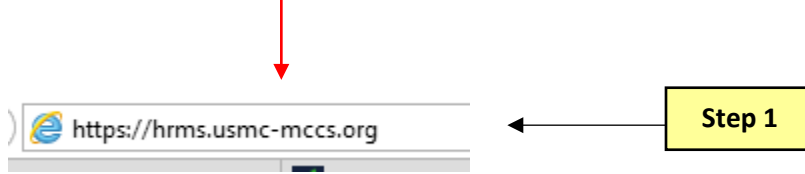
## **When to Use**

- ✓ Initiating Federal Tax Information
- ✓ Updating Federal Tax Information

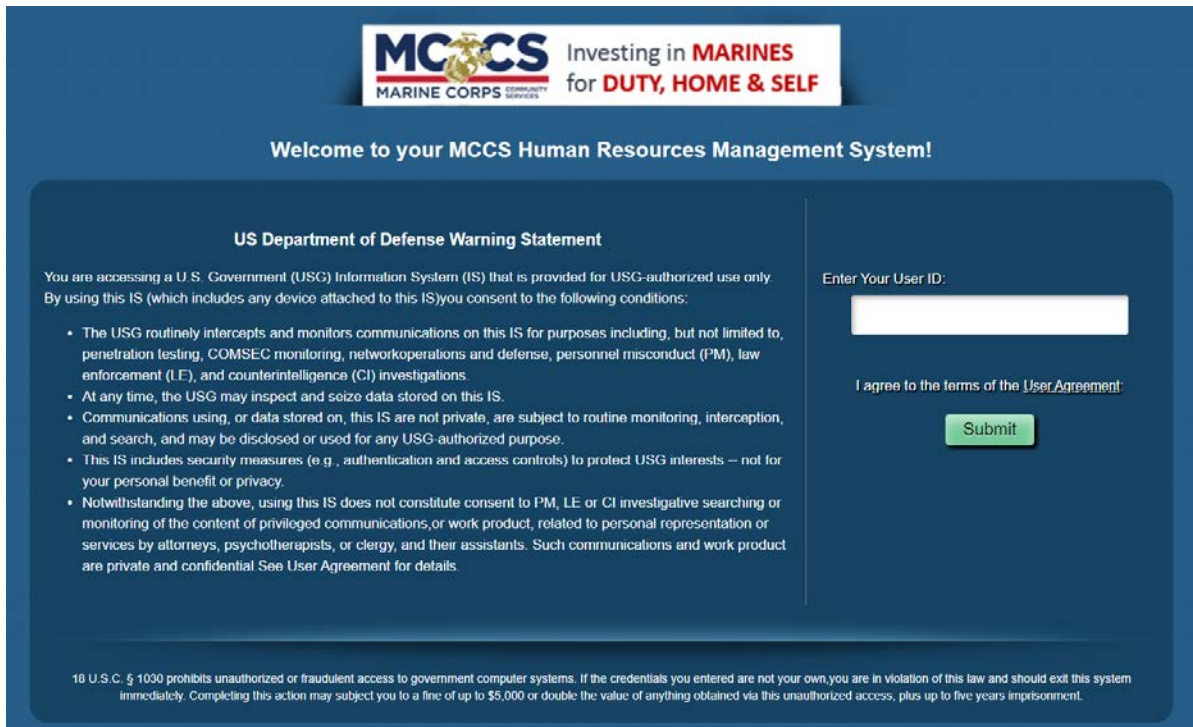
**NOTE:** For assistance with completing your Federal Tax Information, see instructions for Form W-4 on the IRS website or consult your tax advisor.

**Step 1:** Enter the following URL link into the address bar on Internet Explorer.

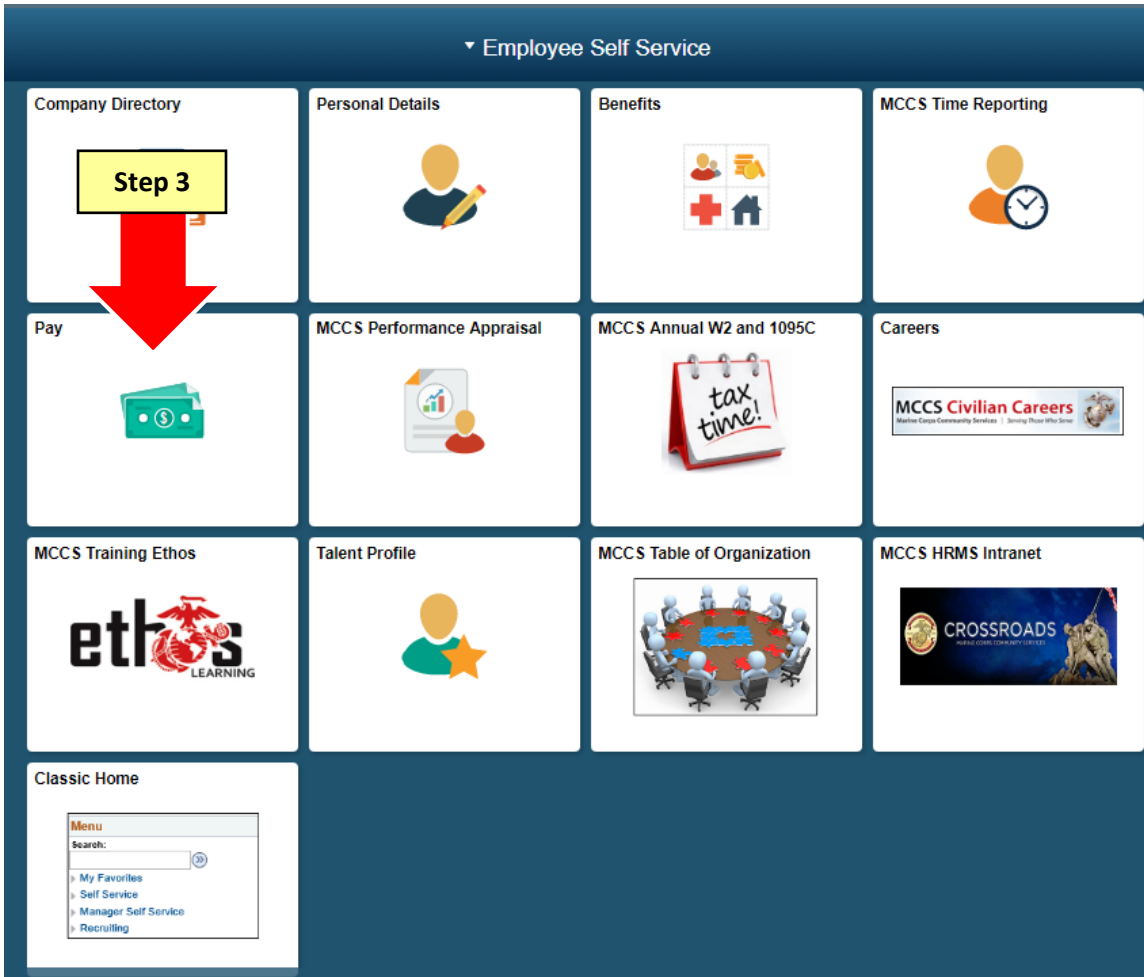
<https://hrms.usmc-mccs.org>



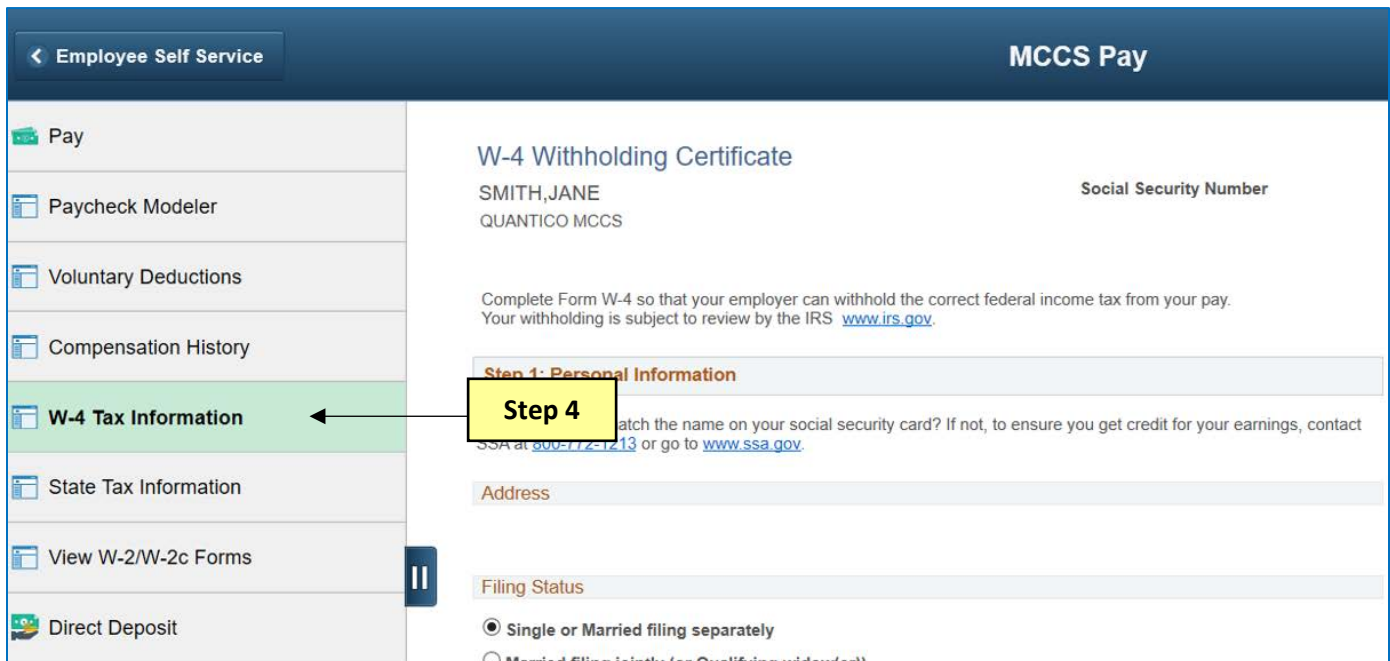
**Step 2:** Log into Self Service by entering your User ID and Password.



**Step 3:** Select the Pay tile.



**Step 4:** Select the W-4 Tax Information tab from the menu.



**Step 5:** Review your address information for accuracy.

**W-4 Withholding Certificate**

SMITH, JANE Social Security Number  
QUANTICO MCCS

Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Your withholding is subject to review by the IRS [www.irs.gov](http://www.irs.gov).

**Step 1: Personal Information**

Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at [800-772-1213](tel:800-772-1213) or go to [www.ssa.gov](http://www.ssa.gov).

**Address**

101 MAIN STREET  
TOWN VA 12345

**Filing Status**




**Step 6:** Update the applicable filing status under the Filing Status section.

**Filing Status**

**Single or Married filing separately**

**Married filing jointly (or Qualifying widow(er))**

**Head of Household** (Check only if you are unmarried and pay more than half the cost of keeping up a home for yourself and a qualifying individual).



**NOTE:** Complete Steps 7 through 9 ONLY if they apply to you. To see if you are exempt from withholding or for additional assistance with completing your Federal Tax Information, see instructions for Form W-4 on the IRS website.

**Step 7:** Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works.

**Step 8:** Complete this step to claim dependents.

**Step 9:** Complete this step if you have other adjustments for other income, deductions, or extra withholding.

**NOTE:** Select the View Instructions link in each section to display additional information about each section.

### Step 2: Multiple Jobs or Spouse Works

Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all these jobs.

[View Instructions](#)

Multiple Jobs or Spouse Works

Complete Steps 3 through 4(b) on Form W-4 for only one of these jobs. Leave those steps blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3 through 4(b) on the Form W-4 for the highest paying job.)

### Step 3: Claim Dependents

[View Instructions](#)

If your income will be \$200,000 or less (\$400,000 or less if married filing jointly):

Multiply the number of qualifying children under age 17 by \$2,000

Multiply the number of other dependents by \$500

Other tax credits

Total

### Step 4: Other Adjustments

[View Instructions](#)

(a) Other Income

(b) Deductions

(c) Extra Withholding

**Step 10:** Select the checkbox if you meet the conditions to claim exempt status.

**Step 11:** Once all data has been entered, select Submit.

**Claim Exemption from Withholding**

I claim exemption from withholding for the year  and I certify that I meet BOTH of the following conditions for exemption from withholding:

- Last year I owed no federal income tax.
- This year I expect to owe no federal income tax.

Check this box if you meet both conditions to claim exemption from tax withholding

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.

**Step 12:** You will receive a submission confirmation. Click OK.

**NOTE:** Due to timing, your change may not be reflected on the next paycheck.

**Submit Confirmation**

The Submit was successful.  
However, due to timing, your change may not be reflected on the next paycheck.