

Quick Reference:

Updating W-4 Tax Information

STEP 1
Sign In to PeopleSoft using your OU 4 x 4 and password.

STEP 2
Navigate to Self Service → Payroll and Compensation → W4 Tax Information

Important Information: Your W-4 defaults to Marital Status: Single and Allowances: 0 when you are hired at the University of Oklahoma.

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STEP 3

Verify your personal information has automatically populated in the form

W-4 Tax Information

John Smith
University of Oklahoma

Social Security Number 123-45-6789

You must complete Form W-4 so the Payroll Department can calculate the correct amount of tax to withhold from your pay. Federal income tax is withheld from your wages based on marital status and the number of allowances claimed on this form. You may also specify that an additional dollar amount be withheld. You can file a new Form W-4 anytime your tax situation changes and you choose to have more, or less, tax withheld.

Whether you are entitled to claim a certain number of allowances or exemption from withholding is subject to review by the IRS. Your employer may be required to send a copy of this form to the IRS.

Home Address

W-4 Tax Data

Enter total number of Allowances you are claiming

Enter Additional Amount, if any, you want withheld from each paycheck

Indicate Tax Status

Single Married

Check here and select Single status if married but withholding at single rate.
Note: If married, but legally separated, or spouse is a nonresident alien, select 'Single' status.

Check here if your last name differs from that shown on your social security card.
You must call 1-800-772-1213 for a new card.

Exemption

I claim exemption from withholding for the year 2017 and I certify that I meet
of the following conditions for exemption

Exemption Conditions

I certify that I had a right to a refund of ALL Federal income tax withheld because I had NO tax liability.

I certify that I expect a refund of ALL Federal income tax withheld because I expect to have NO tax liability.

Check this box if you meet both conditions to claim exempt status.

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.

Submit

STEP 6

Click Submit to save your changes.

STEP 4

Enter the total number of allowances you are claiming.
Enter any additional amount you want withheld from each paycheck.

STEP 5

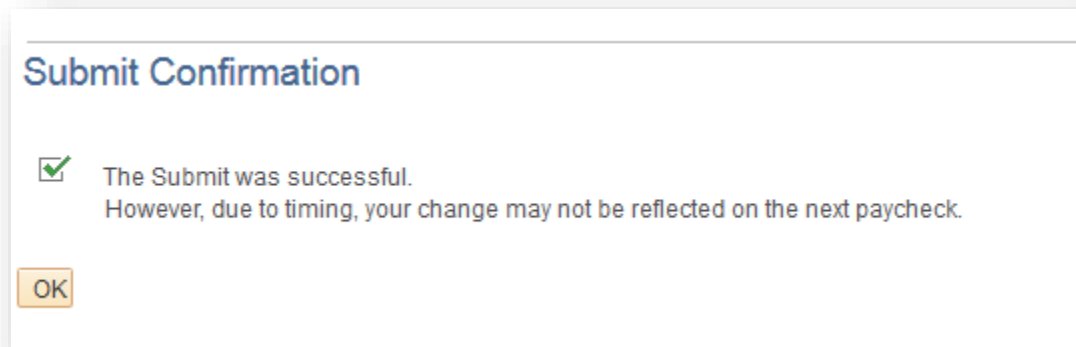
Select your marital status.
Check the related boxes that apply to you.

Important Information: If you are an Oklahoma Resident for state taxes, a change in marital status and/or allowances on your federal W-4 will also update your marital status and/or allowances on your Oklahoma state taxes.

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You will receive a confirmation notification (see below).



Important Information: Please allow one pay period for changes to take effect.