

## Pay Info: Change Tax Withholding Information in Bear Trax

All Employees


### Introduction

#### Purpose:

The purpose of this task is to view and make changes to your withholding information on your Federal (W-4) and State tax forms.

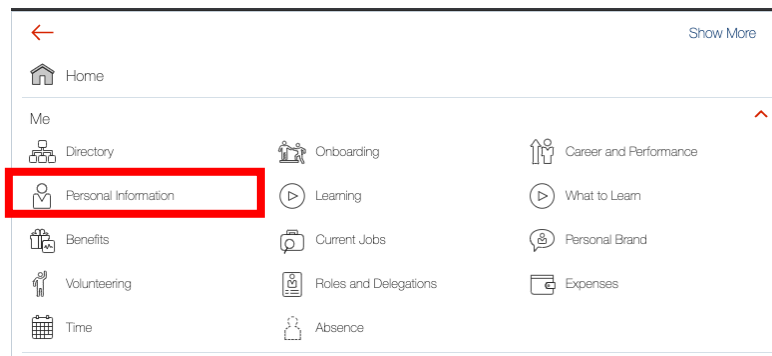
#### How to

#### Access:

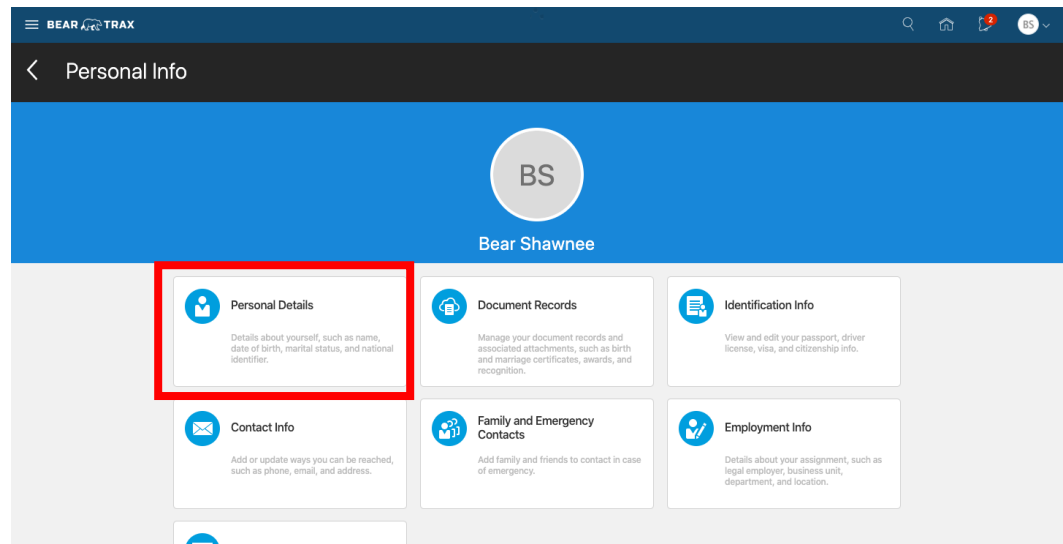
Go to the [Home Screen](#) by clicking the  icon.

Click the  icon.

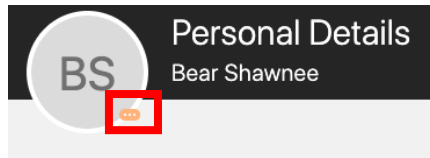
Select "Personal Information" from the navigator menu



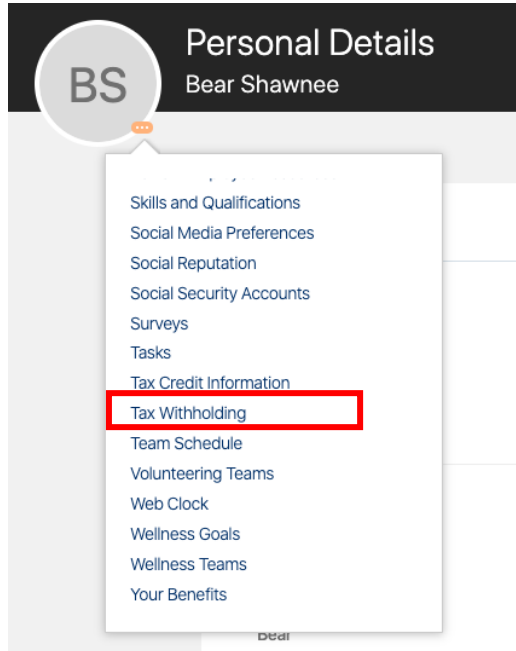
Select **Personal Details** from this screen.



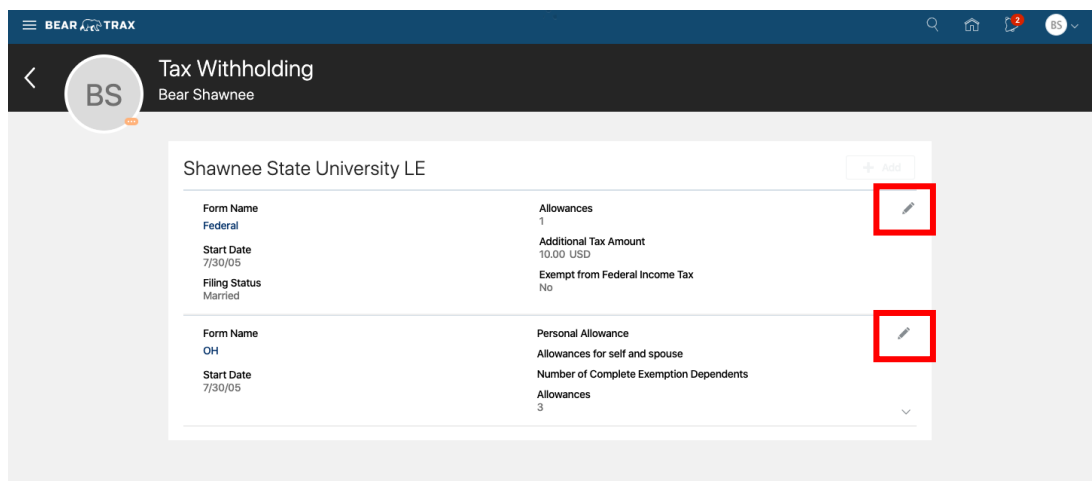
Click the orange "..." to expand a list.



Scroll down this list and select **Tax Withholding**.



From this screen, you can view your current tax withholding information as well as make changes to your withholdings for both your federal and state taxes.



**Helpful Hints:**

Be sure to keep in mind that...

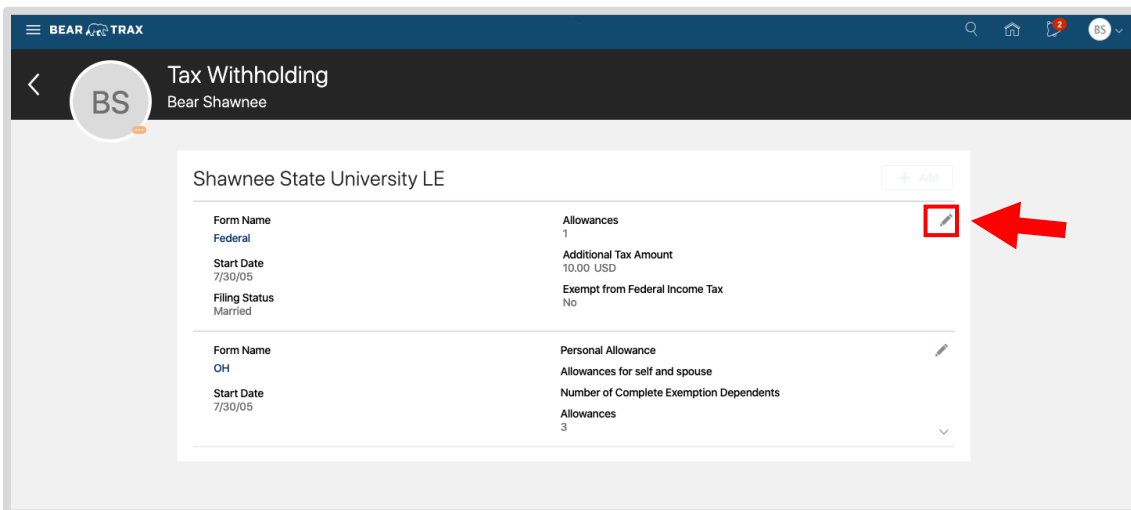
- You can view your future and past withholding amounts from this screen on the right-hand side of the screen.
- You can change your withholding preferences and delay the effective date.
- You can export your tax reporting information to a Microsoft Excel spreadsheet from this screen.

**Procedure:** Complete the following steps to make changes to your tax withholdings:

## Edit your Federal (W-4) Withholdings

Follow these instructions to edit your Federal Withholdings:

1. Click the “pencil” icon next to your Federal tax filing status.



The screenshot shows a mobile application interface for 'Tax Withholding' for 'Bear Shawnee'. The user is logged in as 'BS'. The main content area is titled 'Shawnee State University LE' and contains a table of withholding entries. The first entry is 'Federal' with a pencil icon next to it, which is highlighted by a red arrow. The second entry is 'OH' with a pencil icon next to it. The table has columns for 'Form Name', 'Start Date', and 'Allowances'. The 'Federal' entry has a start date of 7/30/05 and 1 allowance. The 'OH' entry has a start date of 7/30/05 and 3 allowances. There is an '+ Add' button in the top right corner of the table.

Form Name	Start Date	Allowances
Federal	7/30/05	1
OH	7/30/05	3

2. Fill in the necessary information/changes.

Note: Make sure to check **I Agree**. Then click Save.

Shawnee State University LE

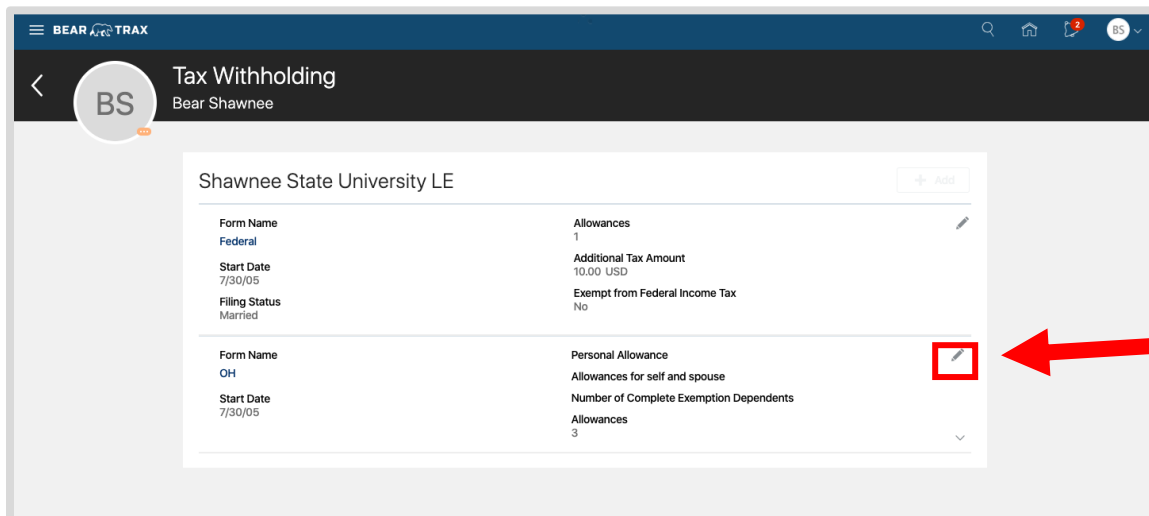
<p>Form Name Federal</p> <p>*When does this change start? 5/6/20</p> <p>Filing Status [Dropdown]</p> <p>Multiple Jobs [Dropdown]</p> <p>Extra Withholding 10.00 USD</p> <p>Exempt from Federal Income Tax No</p> <p><input type="checkbox"/> I Agree</p>	<p>Qualifying Dependents Amount 0 USD</p> <p>Other Dependents Amount 0 USD</p> <p>Total Dependents Amount 0 USD</p> <p>Other Income Amount 0 USD</p> <p>Deductions Amount 0 USD</p>
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\*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.

## Edit your State Withholdings

Follow these instructions to edit your State Withholdings:

1. Click the "pencil" icon next to the state item requiring revision.



BEAR TRAX

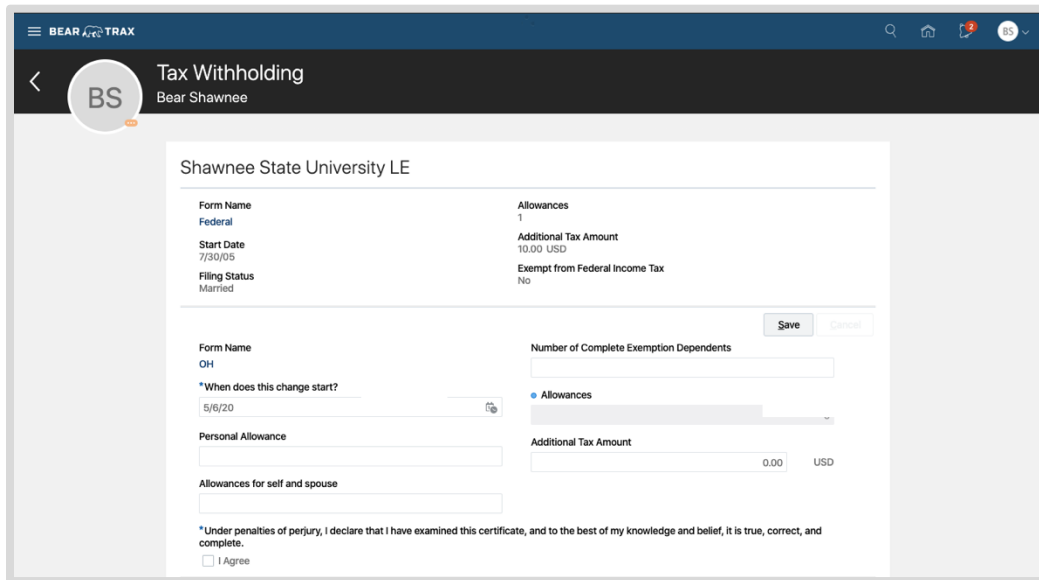
BS Tax Withholding Bear Shawnee

Shawnee State University LE

<p>Form Name Federal</p> <p>Start Date 7/30/05</p> <p>Filing Status Married</p>	<p>Allowances 1</p> <p>Additional Tax Amount 10.00 USD</p> <p>Exempt from Federal Income Tax No</p>
<p>Form Name OH</p> <p>Start Date 7/30/05</p>	<p>Personal Allowance Allowances for self and spouse</p> <p>Number of Complete Exemption Dependents Allowances 3</p>

2. Fill in the necessary information/changes.

Note: Make sure to check **I Agree**. Then click Save.



For example, if you are claiming a personal exemption for yourself, type a '1' on line 1

## Final Notes

By following these steps, you have successfully changed the withholding preferences for your Federal W-4 and/or State Employee's Withholding Exemption Certificate.