

ESS Withholding Forms: Federal and State

Version 1.1 | July 15, 2022

This job aid provides instructions for adding and updating Employee Federal (Form W4) and State (Form DE 4) Withholdings on the Employee Self-Service (ESS) page, <https://ess.erp.sdcoe.net>. The ESS pages for Federal and State are replicates of the forms themselves. You will be able to view the actual W4 and DE 4 forms on each page.

ESS Withholding Forms: Federal

Disclaimer about the Federal Tax Withholding Form:

DISCLAIMER: Please note that, when you update your W-4 information and save your changes, the changes you make will supersede any settings you previously had in place. Settings you had in place previously will NOT be carried over into changes you make on this form, so it is critical that you complete the form by including ALL deductions and necessary changes.

Please also note that the changes you make will take effect on the day that you make them. Because of this, please be aware of the dates on which payroll runs. If you need for changes to take effect as of a certain payroll, please contact your Payroll Department to find out the W-4 deadline for the current month.

I agree to hold harmless and indemnify the School District(s), Charter School(s) and SDCOE and their officers, employees and agents from any claim or demand of whatever nature, including those based upon negligence of the District, School or SDCOE and their officers, employees and agents for failure or delay in making changes requested on the W-4.

This authorization replaces any previous agreements made by me and will remain in effect until changed or cancelled by submission of a new W-4 form to the District, School or SDCOE office in which I am currently employed. All District, School and SDCOE assignments, both current and future will automatically be linked to the most recent W-4 form received by my current employer(s).

1. To access Withholding Forms, in **Employee Self Service**, click the **Payroll and Compensation** tile



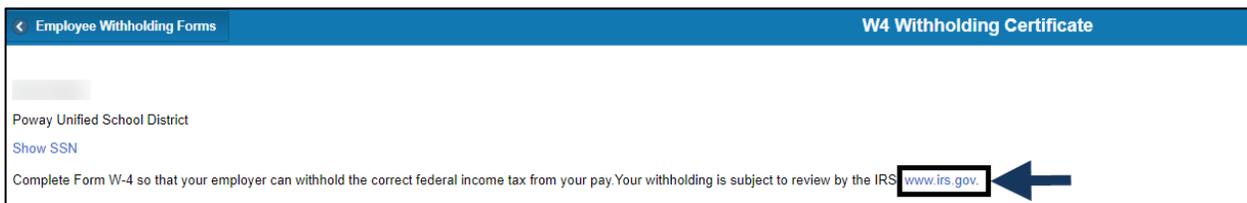
2. Click on **Employee Withholding Forms**



3. Click > to edit your **Federal** withholding.

Employee Withholding Forms			
Company	Description	Jurisdiction	
1 061	Poway Unified School District	Federal	
2 061	Poway Unified School District	State - CA	>

4. Click the www.irs.gov link to view the W4 Form. This opens in a new tab. You may want to leave it open for reference as you complete the W-4 form in ESS.



Step 1: Personal Information:

- **Address** – If address needs updating, refer to the Personal Information section of ESS
- **Filing status.**

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 or go to www.ssa.gov.

Address

San Diego CA

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).

Only Complete Steps 2 – 4 if they apply to you.

Exemption Form is after Step 4: To see if you are exempt from withholding or you have concerns about your privacy, see instructions for Form W-4 on the IRS website.

Step 2: Multiple Jobs or Spouse Works: Read this section carefully. Click **View Instructions** to determine if you qualify.

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 No

Step 2 con't: Read the instructions carefully. **Multiple Jobs or Spouse Works:** Click the box if you meet the criteria.

[Hide Instructions](#)

Do only one of the following.

(a) Use the estimator at www.irs.gov/M4App for most accurate withholding, or
 (b) Use the Multiple Jobs Worksheet and enter the result in Step 4 (c) below for roughly accurate withholding, or
 (c) If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld.

CAUTION: If you have privacy concerns, choose (a) or (b). If you and/or your spouse have income from self-employment, including as an independent contractor, choose (a).

Multiple Jobs or Spouse Works No

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: Read this section carefully. Click **View Instructions** for further details.

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: Click **View Instructions** for further details.

Step 4: Other Adjustments

[View Instructions](#)

(a) Other Income

(b) Deductions

(c) Extra Withholding

Claim Exemption from Withholding: Read carefully and check if you meet both conditions.

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 None

Read carefully and Click Submit when finished.

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.

Email notification will be sent to alert you that a change was made to your information. If you did not make the change, please contact your payroll administration team at your district.

Withholding Updated Successfully. Employee will receive a notification email

ESS Withholding Forms: State (DE 4)

Disclaimer about the State Tax Withholding Form:

DISCLAIMER: Please note that, when you update your DE 4 information and save your changes, the changes you make will supersede any settings you previously had in place. Settings you had in place previously will NOT be carried over into changes you make on this form, so it is critical that you complete the form by including ALL deductions and necessary changes.

Please also note that the changes you make will take effect on the day that you make them. Because of this, please be aware of the dates on which payroll runs. If you need for changes to take effect as of a certain payroll, please contact your Payroll Department to find out the DE 4 deadline for the current month.

I agree to hold harmless and indemnify the School District(s), Charter School(s) and SDCOE and their officers, employees and agents from any claim or demand of whatever nature, including those based upon negligence of the District, School or SDCOE and their officers, employees and agents for failure or delay in making changes requested on the DE 4.

This authorization replaces any previous agreements made by me and will remain in effect until changed or cancelled by submission of a new DE 4 form to the District, School or SDCOE office in which I am currently employed. All District, School and SDCOE assignments, both current and future will automatically be linked to the most recent DE 4 form received by my current employer(s).

1. To access Withholding Forms, in **Employee Self Service**, click the **Payroll and Compensation** tile



2. Click on **Employee Withholding Forms**



3. Click > to edit your State withholding.

Employee Withholding Forms			
Company	Description	Jurisdiction	
1 061	Poway Unified School District	Federal	>
2 061	Poway Unified School District	State - CA	 

4. **Personal Information:** Click the **Official State Tax Form** link to view the DE 4 Form.

- **Address** – If address needs updating, refer to the Personal Information section of ESS

Personal Information:

Poway Unified School District

Show SSN

Official State Tax Form 

Address

San Diego CA

5. **Filing Status:** Read carefully and fill out the form as desire

Filing Status

SINGLE or MARRIED (with two or more incomes)

MARRIED (one income)

HEAD OF HOUSEHOLD

1. Number of allowances for Regular Withholding Allowances, Worksheet A

Number of allowances from the Estimated Deductions, Worksheet B

Total Number of Allowances (A + B) when using the California Withholding Schedules for 2020

OR

2. Additional amount of state income tax to be withheld each pay period (if employer agrees), Worksheet C

OR

3. I certify under penalty of perjury that I am not subject to California withholding. I meet the conditions set forth under the Service Member Civil Relief Act, as amended by the Military Spouses Residency Relief Act.

Check "box" here None

6. **Read carefully and Click Submit when finished.**

Under the penalties of perjury, I certify that the number of withholding allowances claimed on this certificate does not exceed the number to which I am entitled or, if claiming exemption from withholding, that I am entitled to claim the exempt status.

Submit

Email notification will be sent to alert you that a change was made to your information. If you did not make the change, please contact your payroll administration team at your district.

Withholding Updated Successfully. Employee will receive a notification email

OK