

# How To: Submit or Update Tax Information

This job aid provides an overview of the steps required to submit or update your federal and state tax information in PeopleSoft.

## Step 1:

Log onto your PeopleSoft account via pshcm.dc.gov while at a DCPS location.

Note: Tax information cannot be submitted via the out-of-network web address, ess.dc.gov, while at home.



**PeopleSoft Support Site**

**Navigation**

- Home
- PeopleSoft Log in**
- Self Service (SS)
- Information for Agencies-Staff
- PeopleSoft 9.0 Upgrade
- PeopleSoft 9.0 Time and Labor Training
- PeopleSoft 9.0 HR and TAM Training
- PeopleSoft 9.0 ELM - Learning and Development
- Release Information
- PeopleSoft Feedback-Comments
- Sitemap

**Recent site activity**

[View All](#)

**Navigation**

---

**PeopleSoft Log in**

---

[Log in to PeopleSoft here](#) (log in from work)

[ESS.dc.gov](#) (log in to Self Service from home)

---

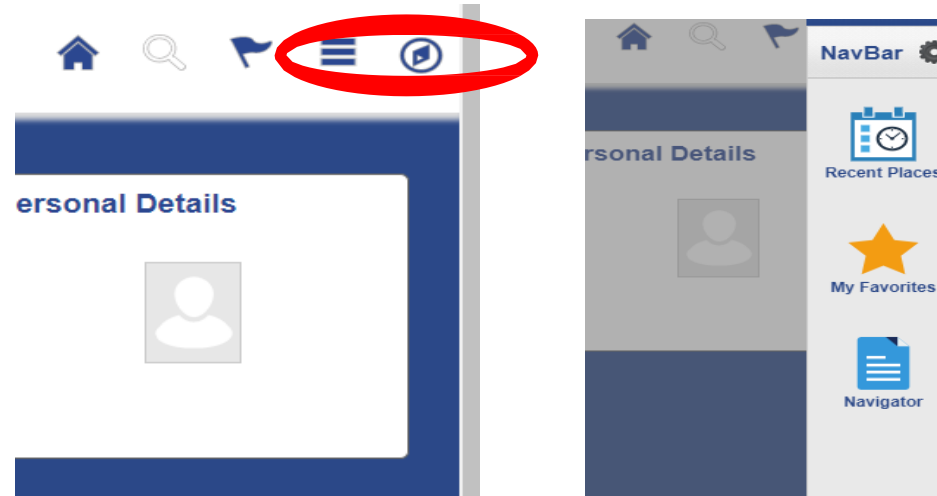
**Help with PeopleSoft Log in**

Contact the DCHR Answers at (202) 442-9700, 8:00am - 5pm, Monday through Friday, if you are having issues logging in.

Or, contact the OCTO Help Desk at (202) 727-8700, 8:00am - 6pm, Monday through Friday.

## Step 2:

Select the Navigation icon-the slanted diamond at the top right corner of your page. Once you click this icon, a drop-down menu will appear. You'll then select "Navigator" to pull up the full navigation menu:



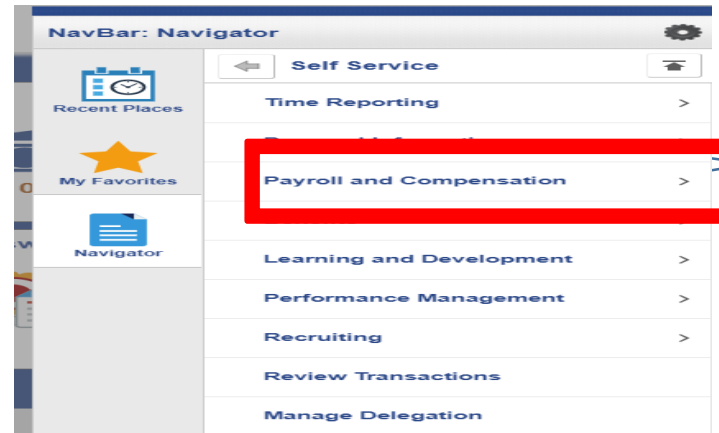
The first screenshot shows the top navigation bar with icons for Home, Search, and a slanted diamond icon (Navigation) circled in red. Below it is a 'Personal Details' section with a user profile picture.

The second screenshot shows the dropdown menu that appears after clicking the navigation icon. It includes a 'NavBar' header with a gear icon, and three menu items: 'Recent Places' (calendar icon), 'My Favorites' (star icon), and 'Navigator' (document icon).

## How To: Submit or Update Tax Information

### Step 3:

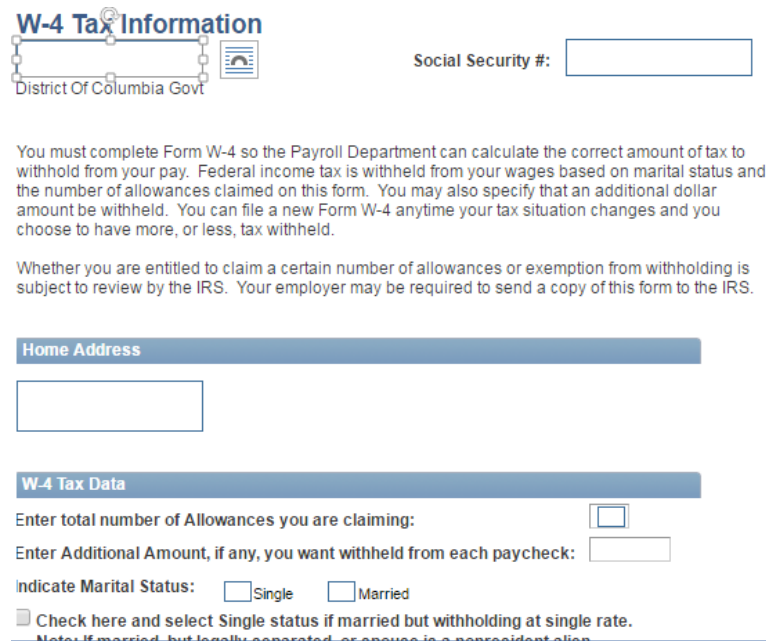
Then, select “Self Service” within the Navigator list, which will then show a list of categories within your account to select. You will select “Payroll and Compensation” to view payroll related functions, including “W-4 Tax Information” to update Federal taxes, and “State Tax Information” to update State Tax information.



### Completing the W-4

When you select the “W-4 Tax Information” option, complete all fields as requested, including the number of allowances you’d like to claim and your marital status.

Complete fields as appropriate and click the submit button at the bottom of the page.



The image shows the 'W-4 Tax Information' form. At the top left is the 'District Of Columbia Govt' logo. To the right is a 'Social Security #' field with an empty input box. Below this is a paragraph of instructions: '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.' Below this is another paragraph: '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.' The form has several sections: 'Home Address' with an empty input box, 'W-4 Tax Data' with 'Enter total number of Allowances you are claiming:' (input: 0), 'Enter Additional Amount, if any, you want withheld from each paycheck:' (input: empty), 'Indicate Marital Status:' with radio buttons for 'Single' and 'Married', and a checkbox for 'Check here and select Single status if married but withholding at single rate.' Below the checkbox is a note: 'Note: If married, but legally separated, or spouse is a nonresident alien'.

## How To: Submit or Update Tax Information

### Completing State Tax Information

When you select the “State Tax Information” section, you will need to complete and submit two separate pages. First, indicate the state to which you’d like to pay taxes. Submit the form by selecting the “Submit” icon.

Next, you will be brought to a state/local jurisdiction tax form. Complete all fields as appropriate, and click the “Submit” button.

**Page 1**

State Tax Information

**State Tax Information**

District Of Columbia Govt

Social Security #: [Redacted]

You must complete a state/local jurisdiction tax form so the Payroll Department can calculate the correct amount of tax to withhold from your pay.

**Home Address**

[Redacted]

**State Tax Data**

Select Jurisdiction:

District of Columbia

Maryland

Virginia

Other

Submit

**Page 2**

State Tax Information

District Of Columbia Govt

Social Security #: [Redacted]

You must complete a state/local jurisdiction tax form so the Payroll Department can calculate the correct amount of tax to withhold from your pay.

**Home Address**

[Redacted]

**State Tax Data**

If subject to withholding, enter the number of exemptions claimed on:

(a) Subtotal of Personal Exemptions - line 4 of the form VA-4 Personal Exemption Worksheet:

(b) Subtotal of Exemptions for Age and Blindness line 7 of the form VA-4 Personal Exemption Worksheet:

(c) Total Exemptions - line 8 of the form VA-4 Personal Exemption Worksheet:

Enter the amount of additional withholding requested: ( see form VA-4 for instructions )

[Virginia Form VA-4](#)

**Claim Exemption**

**Note:** If you are selecting a state other than Maryland, Virginia, or Washington, D.C., PeopleSoft will not withdraw state taxes and you will need to work with that state’s IRS division to pay taxes manually and directly to the state.

Note: The “Exempt” box should only be selected within the W4 and State Tax sections if you meet the IRS’ exemption standards. If you are unsure if you meet this status, please consult a tax professional or the IRS website, [www.irs.gov](http://www.irs.gov).

Note: Direct Deposit changes will reflect on the following pay period after submission, provided the changes were made before payroll was processed for the following paycheck. To review the DC Government pay schedule and processing deadlines, click here: [2017 Payroll Schedule](#)

Questions regarding the tax preference process can be directed to the OCFO (Payroll) at 202-442-5300 or the Time and Labor Team at [dcps.timeandlabor@dcc.gov](mailto:dcps.timeandlabor@dcc.gov).