

Adjust Tax Withholdings in Paylocity Self-Service

After using the IRS withholding calculator to determine the appropriate amount of withholding amount for the current tax year, log onto your Paylocity Self Service user account to update tax withholdings and use the Check Calculator to determine how the adjustments will affect your net pay.

- **Log into Paylocity Self Service**

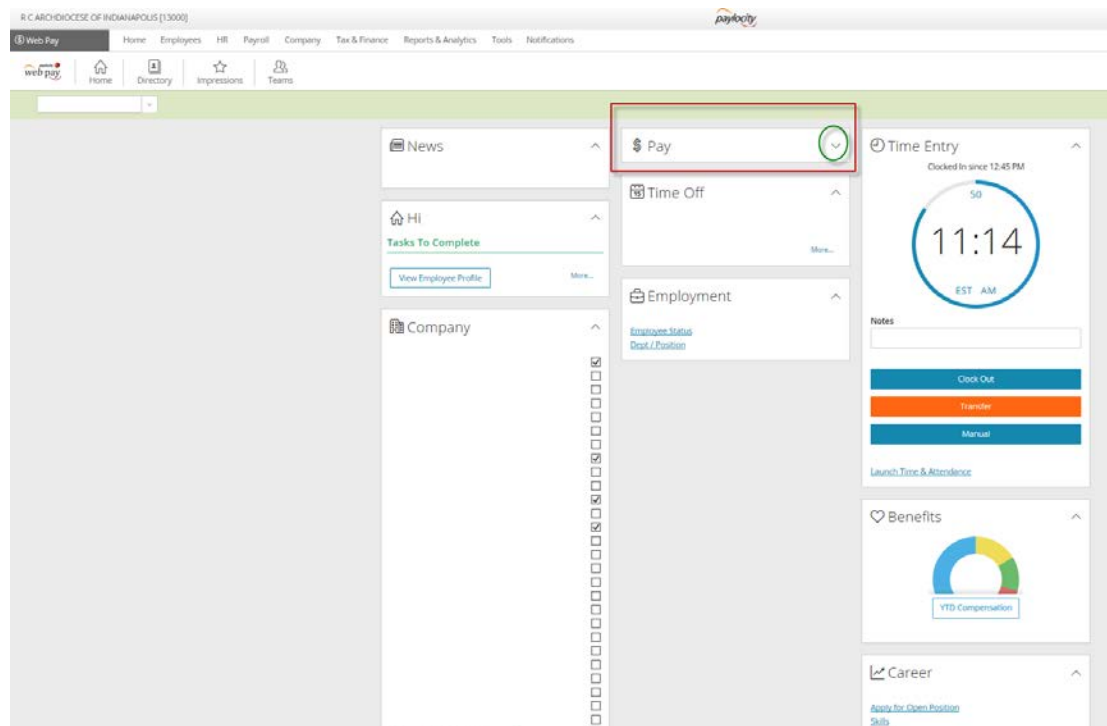
<https://access.paylocity.com/>

Enter your Company ID, Username, and Password.

Please contact your Business Manager for assistance with accessing your user account.

- **Update Withholdings**

When you log into Paylocity Self Service, you land on your self-service page which looks like this screen print. Click on the down area in the **Pay** area:



Click on the blue link that says [More](#):

The screenshot shows a dashboard with three main columns. The left column contains 'News', 'Hi, Tasks To Complete' (with a 'View Employee Profile' button and 'More...' link), and 'Company' (with a list of checkboxes). The middle column has a '\$ Pay' section with a table, a 'Go Paperless' button, and a 'More...' link highlighted by a red box and arrow. Below it is a 'Time Off' section and an 'Employment' section with links for 'Employee Status' and 'Dept / Position'. The right column is titled 'Time Entry' and shows 'Clocked In since 12:45 PM', a circular clock displaying '11:16 EST AM', and buttons for 'Clock Out', 'Transfer', and 'Manual'. A 'Notes' field and a 'Launch Time & Attendance' link are also present.

Date	Check #	Net Amount	Dir Dep
04/13/2018			✓
03/30/2018			✓

Click on the blue [Tax Exemptions](#) link:

This screenshot is similar to the first one but shows the 'Pay' section expanded. Below the 'Go Paperless' button, there are links for 'Direct Deposit Accounts', 'Tax Forms', 'Tax Exemptions' (highlighted with a red box and arrow), and 'Check Calculator'. The 'Time Entry' section on the right now shows 'Clocked In since 12:45 PM' and a circular clock displaying '11:17 EST AM'.

From this page, you can click on the blue Federal or State tax links to update withholdings:

Taxes

View / Sort Name [ID] (Dept)

Personal Work **Payroll Setup** Pay Time Off Schedules Web Time Integration

Rates **Taxes** Earnings Deductions Direct Deposit Labor Allocation Reminders

Taxes

<input checked="" type="checkbox"/>	Tax Code	Filing Status	Exemptions 1	Exemptions 2	Type
<input type="checkbox"/>	FITW - Federal Income Tax	Married	1	N/A	Additional Flat
<input type="checkbox"/>	IN - Indiana SITW	Married	0	0	Default
<input type="checkbox"/>	IN-MAR1 - Marion, IN (Res)	N/A	0	0	Default

Add Delete Change State

On the Federal withholdings page, you can update Filing Status, Exemptions, and add any additional flat amount you'd like to withhold for federal taxes:

Taxes > Tax Details Employee Name

Personal Work **Payroll Setup** Pay Time Off Schedules Web Time Integration

Rates **Taxes** Earnings Deductions Direct Deposit Labor Allocation Reminders

Federal Tax Details

Tax Code FITW - Federal Income Tax

Tax Form [Blank Federal W-4 Form](#)

• Filing Status Married

• Exemption 1 1

Exemption 2 0

Notes
Valid filing status codes are Single (S), Married (M), single Non-Resident Alien (NRA), and married Non-Resident Alien (NRM).
Enter E for employee election.

• Amount Type Additional Flat

• Amount 27.00

Percentage 0

Supplemental Check Use Supplemental Tax Rate - Code

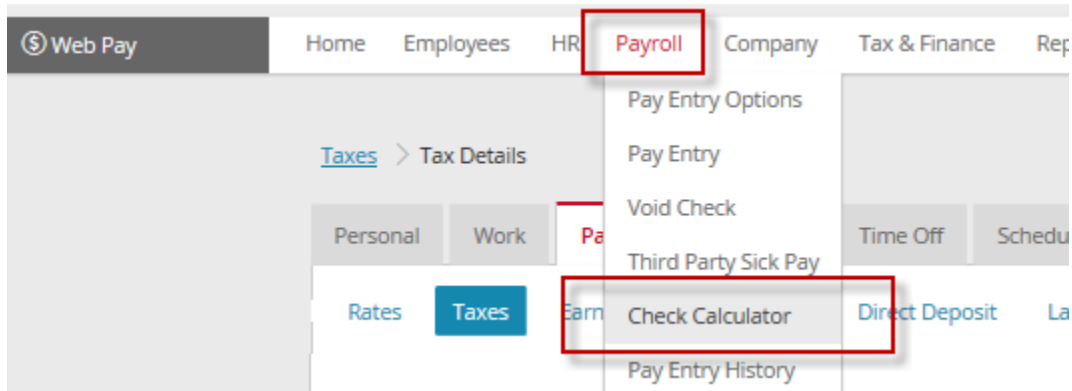
Reciprocity Code N/A

Save Save & Return Cancel

- **Use Check Calculator to determine net pay**

Select the Payroll Menu.

Select Check Calculator.



Select the Taxes tab.

Update the withholding information, then click on the Preview/Summary tab to preview how the changes will affect your net pay.

