

Editing Your Tax Information Via Desktop

Document 2-6.

August 6th , 2021

Purpose of Activity

To learn how to locate edit your tax information in Paylocity's Desktop application.

Background

This process is necessary in order to have your correct tax information under your personal Paylocity account.

Prerequisites

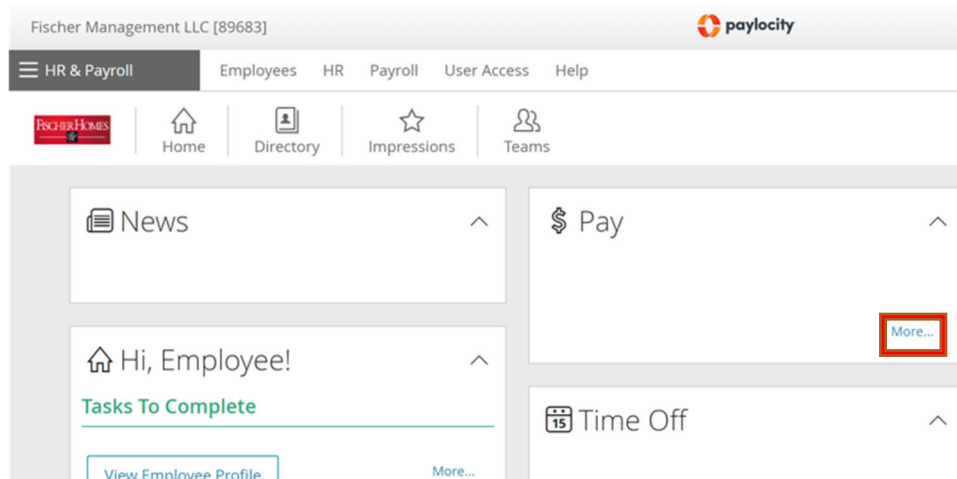
You must have downloaded the Paylocity app onto your Android device and logged into your account.

Calendar

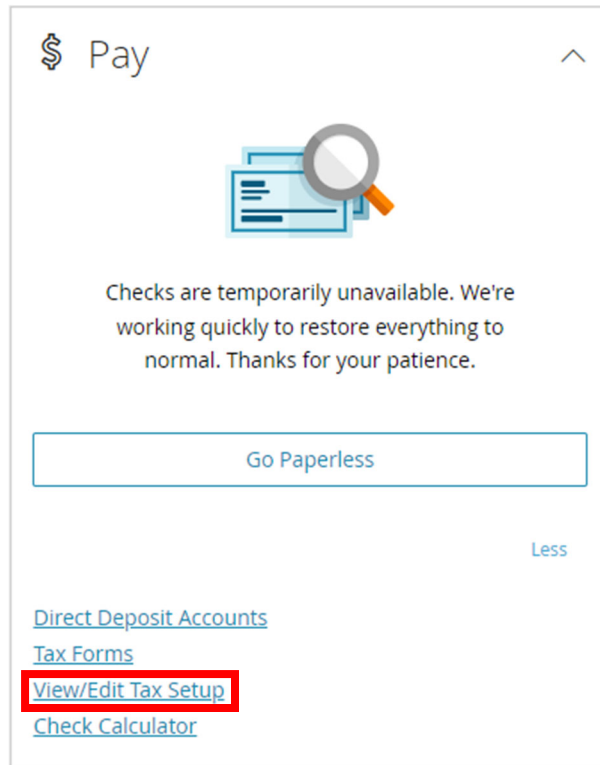
This process should be completed as needed

Process:

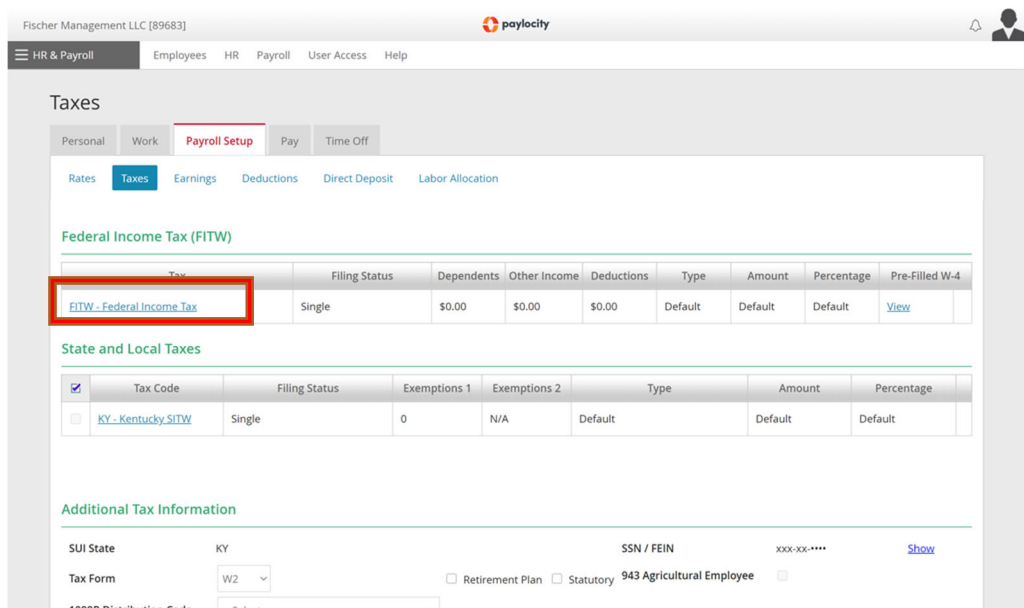
1. Expand the Pay section by clicking on More.



- In the Pay tab, click on View/Edit Tax Setup.



- To edit your tax information, click on either your Federal Income Tax or State and Local Tax form hyperlink.



- Edit the necessary fields
 - Filing status

- b. Multiple jobs
 - c. Dependents
 - d. Other income
 - e. Deductions
 - f. Extra withholding and dollar/percent
5. Click Save and Return.

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HR & Payroll Employees HR Payroll User Access Help

Taxes > Tax Details Employee Name/Id/Dept: Test Employee [2] (9999- 9999- 9999)

Personal Work **Payroll Setup** Pay Time Off

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

Federal Tax Details

Tax Code FITW - Federal Income Tax

Notes: Use the fields on this page to tell your employer how much to withhold from your pay for Federal Income Taxes. With "2019 or Prior" selected at the top of the page, the fields listed match up with the 2019 and prior Form W-4. With "2020 or later" selected, the fields listed will match up with the current Form W-4. Once you switch to the current Form W-4, you will not be able to go back to the 2019 and prior form.

W-4 Tax Form

- Filing Status: Single
- Multiple Jobs or Spouse Works (Line 2c):
- Dependents (Line 3): \$ 0.00
- Other Income (Line 4a): \$ 0.00
- Deductions (Line 4b): \$ 0.00
- Extra Withholding (Line 4c): Default Amount
- Amount: \$ 0
- Percentage: % 0

Blank Federal W-4 Form

Save Save & Return Cancel

6. Click Save and Confirm.

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HR & Payroll Employees HR Payroll User Access Help

Taxes > Tax Details Employee Name/Id/Dept: Test Employee [2] (9999- 9999- 9999)

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- Other Income (Line 4a): \$ 0.00
- Deductions (Line 4b): \$ 0.00
- Extra Withholding (Line 4c): Default Amount
- Amount: \$ 0
- Percentage: % 0

Blank Federal W-4 Form

Save Changes and Update W-4?

By clicking save, you are confirming the following: Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.

Save & Confirm Cancel

Save Save & Return Cancel





7. You'll see that your tax record was successfully saved.

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HR & Payroll Employees HR Payroll User Access Help

Taxes

Tax record saved successfully!

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Federal Income Tax (FITW)

Tax	Filing Status	Dependents	Other Income	Deductions	Type	Amount	Percentage	Pre-Filled W-4
FITW - Federal Income Tax	Single	\$0.00	\$0.00	\$0.00	Default	Default	Default	View

State and Local Taxes

<input checked="" type="checkbox"/>	Tax Code	Filing Status	Exemptions 1	Exemptions 2	Type	Amount	Percentage
<input type="checkbox"/>	KY - Kentucky SITW	Single	0	N/A	Default	Default	Default

Additional Tax Information

SUI State: KY SSN / FEIN: xxx-xx-xxxx [Show](#)

Tax Form: W2 Retirement Plan Statutory 943 Agricultural Employee